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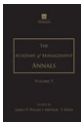

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Considering Planned Change Anew: Stretching Large Group Interventions Strategically, Emotionally, and Meaningfully

Jean M. Bartunek [a], Julia Balogun [b] & Boram Do [c]

[a] Boston College, Department of Organization Studies

[b] Lancaster University Management School

[c] Boston College, Department of Organization Studies

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Considering Planned Change Anew:
Stretching Large Group Interventions Strategically, Emotionally, and Meaningfully

JEAN M. BARTUNEK*
Boston College, Department of Organization Studies

JULIA BALOGUN
Lancaster University Management School

BORAM DO
Boston College, Department of Organization Studies

Abstract
Large Group Interventions, methods for involving "the whole system" in a change process, are important contemporary planned organizational change approaches. They are well known to practitioners but unfamiliar to many organizational researchers, despite the fact that these interventions address crucial issues about which many organizational researchers are concerned. On the other hand, these interventions do not appear to be informed by contemporary developments in organizational theorizing. This disconnect on both sides is problematic. We describe such interventions and their importance; illustrate

*Corresponding author. Email: bartunek@bc.edu

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them with extended descriptions of particular Future Search and Whole-Scale™ change interventions; summarize research on strategy, emotion, and sensemaking that may inform them; and suggest questions about the interventions that may stimulate research and reflection on practice. We also discuss conditions that may foster effective engagement between Large Group Interventions practitioners and organizational researchers. Our approach represents a way to conduct a review that combines scholarly literature and skilled practice and to initiate a dialog between them.

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Introduction

This paper discusses Organization Development (OD) practice and academic theorizing. Through it we seek to build bridges between a popular contemporary form of OD practice called Large Group Interventions and contemporary academic theorizing regarding strategy, emotion, and sensemaking.

Large Group Interventions (Bunker & Alban, 1992, 1997, 2005, 2006; Purser & Griffin, 2008; Shmulyian, Bateman, Philpott, & Gulri, 2010) have been defined as "methods for involving the whole system, internal and external, in [a planned] change process" (Bunker & Alban, 1997, p. xv). They have been used for several decades in organizational change initiatives involving strategic direction, implementation of quality and/or redesign projects, changes in relationships with customers and suppliers, and changes in structures, policies, or procedures (Bunker & Alban, 1997). They have several shared core characteristics (Bunker & Alban, 2006): they include everyone who has a stake in issues under discussion, regardless of whether they are internal or external to an organization; they intentionally search out multiple and differing perspectives; they give all participants an opportunity to influence deliberations; and they search for common ground—what participants can agree on.

Large Group Interventions are well known to practitioners around the world, but management academics are not very cognizant of them. Similarly, while many academics are familiar with theorizing regarding strategy, emotion, and sensemaking, practitioners have comparatively little knowledge of these. Our intent is to make evident the value of practice–scholarship linkages between them and to create such links. We believe that practice and theory have the potential to share much more "common ground" (Weisbord & Janoff, 1995, 2010) than is typically realized.

The approach we take is as follows. First, we provide a very brief historical overview of links between practice, research, and theory regarding OD interventions. Second, we describe Large Group Interventions as a contemporary form of OD practice. Given many academics' lack of familiarity with Large Group Interventions, we do so in some depth. Third, we summarize some contemporary theorizing in strategy, and in emotion and sensemaking, especially as these are likely to be pertinent to Large Group change efforts. We use these summaries to generate questions about Large Group Intervention

processes and outcomes. Fourth, we provide case examples of two Large Group Interventions considered successful by both the consultants leading the interventions and the participating clients (Shmulyian et al., 2010). Using these two interventions as research cases, we suggest ways the theorizing might inform them and how they might inform the theorizing. Finally, we suggest implications of our work for wider scholarly links with practice, how these links might be enabled, and what their usefulness might be.

Brief Review of Theory/Practice Links Related to Organization Development

OD may be defined as "a systemwide application and transfer of behavioral science knowledge to the planned development, improvement, and reinforcement of the strategies, structures, and processes that lead to organization effectiveness" (Cummings & Worley, 2009, pp. 1–2). Historically, there have been explicit linkages between OD planned change interventions and social psychological and organizational scholarship. Kurt Lewin (1951), considered a founder of OD, argued that there is nothing as practical as a good theory. A large number of planned change interventions have been designed over the past 40 years, starting from sensitivity training and team building in the 1950s and 1960s through the multiple types of Large Group Interventions currently (Cummings & Worley, 2009). These have frequently developed alongside related organizational research. For example, during a time when a primary focus of OD was sensitivity training and team building, there was also considerable research on these topics by organizational scholars (Cooper, 1975; Woodman & Sherwood, 1980). Similarly, during a time when a primary focus of OD was transformation, there was considerable scholarly literature on that topic (Bartunek & Louis, 1988; Tushman & Romanelli, 1985), and there were also explicit links developed between OD and strategy (cf., Jelinek & Litterer, 1988; R. Johnson, Hoskisson, & Margulies, 1990; Pettigrew, 1987; Tichy, 1983; Tichy & Devanna, 1990). OD interventions encouraged scholarly thinking, and scholarly thinking, including placing OD within a strategic context, fostered OD interventions.

The practitioner development of methods of planned organizational change continues to flourish (cf., Bartunek & Woodman, in press; Bunker & Alban, 2006; Holman, Devane, & Cady, 2007; Maurer, 2010; Shmulyian et al., 2010). OD practitioners have even started their own journals, such as *Practicing Social Change* (http://www.ntl-psc.org/). But considerable concern has been expressed in recent years that OD is no longer stimulating academic scholarship, thatthere are increasing disconnects between OD practice and academic theorizing (e.g., Argyris, 2005; Bartunek & Schein, 2011; Bunker, 2010; Bunker, Alban, & Lewicki, 2004; Greiner & Cummings, 2004).

There has also been considerable recent intellectual development in scholarly areas that touch on planned organizational change and on those who play a role in it. At the macro end, there has been flourishing in the development

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of strategizing, activities, and practice (Balogun, Jarzabkowski, & Seidl, 2007; Jarzabkowski, Balogun, & Seidl, 2007; G. Johnson, Langley, Melin, & Whittington, 2007; G. Johnson, Melin, & Whittington, 2003), an area of inquiry that extends strategic management research through a study of strategic practice, the actions, activities, and processes that constitute strategy formulation and implementation, as well as the actors involved in accomplishing it. At the micro end, there has been considerable attention to the roles and experiences of recipients of change (e.g., Bartunek, Rousseau, Rudolph, & DePalma, 2006; Oreg, 2003), including their individual and collective affective and meaning-making responses to change that go well beyond the "resistance" role often ascribed to them by scholars and practitioners alike (cf., Bushe & Kassam, 2005; Bushe & Marshak, 2009; Huy, 2002; Sonenshein, 2010; Thomas, Sargent, & Hardy, 2011).

Research that explicitly incorporates these developments is sometimes presented by scholars who align themselves with organizational change and development as an area of scholarly inquiry (e.g., Ford, Ford, & D'Amelio, 2008). But practitioners who develop planned change interventions have not been taking the recent developments in organization and management scholarship into account (Bartunek & Schein, 2011). Rather, there appear to be communities of practitioners and scholars talking past each other (e.g., Brown & Duguid, 1991), when dialogue between them could be beneficial to both sides.

Further, the Large Group Interventions that have been developed and implemented in recent years have had relatively little impact on organizational scholarship, as reflected in developments in studies of strategy, sensemaking, and affect experienced during change. For example, Shmulyian et al. (2010) recently analyzed success factors, outcomes, and the viability of several Large Group methods, but did not explicitly link them with outside scholarly literature. This is despite the fact that, implicitly at least, there are clear links: Large Group and other planned change interventions are often implemented when organizations are trying to accomplish strategically meaningful change, and when emotions are running high. We hope in this paper to create links across these areas of inquiry by posing questions that scholarly research suggests for Large Group Interventions that may help practitioners and academics understand their processes in depth and that may also inform scholarly thinking.

Large Group Interventions

Large Group Interventions are a prominent contemporary form of OD, developed over the last three decades and designed to be "whole systems" approaches to organizational change (Bunker & Alban, 1992, 1997, 2005, 2006; Holman et al., 2007; Purser & Griffin, 2008). Bunker and Alban (2006) observe that the approaches evolved out of three strands. The first was F. Emery and Trist's (1960) and Katz and Kahn's (1966) development of the understanding of organizations as open systems. The second was "a shift from

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focusing on organizational problems that are rooted in the past to focusing on the future and its potential" (Bunker & Alban, 2006, p. 5). Particularly prominent in creating this shift were Lippitt (1980), who noticed that there was much more energy generated among people when they focused on a future they preferred than solving problems, and Trist and Emery (M. Emery & Purser, 1996) who during work with a merger and acquisition asked the merging companies to "consider what kind of company they wanted to become in the future" (Bunker & Alban, 2006, p. 6). The third strand was work done by the National Training Laboratory in the 1960s in which trainers worked with large groups "by creating small groups within a larger framework" (Bunker & Alban, 2006, p. 6). These strands came together in the 1980s with Weisbord's (1987) recognition that it was possible for OD consultants to work with all of the stakeholders, both internal and external to a system, linked with particular issues an organization wanted to address.

As highlighted by Marshak and his collaborators (Bushe & Marshak, 2009; Marshak, 2010; Marshak & Grant, 2008) a fourth strand has also had a strong impact on the recent development of Large Group Interventions, and that is a dialogic approach to understanding that assumes that organizations are "meaning-making" systems (Bushe & Marshak, 2009, p. 353; Gergen, 1978; Marshak & Grant, 2008). They are not locations where objective data about problems can be "diagnosed" and organizations "fixed," an implicit assumption that was true of many earlier OD interventions. A dialogic model "starts from common aspirations and shared visions, making engagement in the change process more appealing" (Bushe & Marshak, 2009, p. 354). Also according to this model, when data are collected it is not assumed that they are representing an objective truth but rather perspectives present in a group and how group members are making sense of particular situations.

There are more than 60 types of Large Group Interventions (Holman et al., 2007). A relatively complete listing is available online at http://www.change-management-toolbook.com/mod/book/view.php?id=74&chapterid=6 (accessed January 20, 2011). They are being used globally and, according to the accounts of their designers (Holman et al., 2007), often quite successfully to help organizations and other types of systems (such as local communities, congregations, etc. cf., Alban & Mead, 2008) accomplish needed change.

The Large Group Interventions may be divided into several different types. One useful classification scheme is presented by Bunker and Alban (1997, 2006). They distinguish Large Group Interventions as to whether they are focused on proactively *creating a desired future together* rather than simply responding to what happens, *redesigning work together* as a whole system, and *whole-scale participative work* that brings "the system together to do real work in real time on [immediate] problems, issues, and agendas that need to be addressed" (Bunker & Alban, 1997, p. 155). Examples of all three types of interventions are shown in Table 1. Also included in Table 1 are sources from

which more information about each of the Large Scale Interventions can be gained. We will focus on two of these interventions: Future Search and Whole-Scale™ Change.

Large Group Interventions (Shmulyian et al., 2010) are all significant interventions into organizational processes. They are well known by a wide variety of practitioners, including managers, consultants, community leaders, and many others across the world.

Further, although most academics are not aware of this, they all provide occasions when issues that academics are very concerned about are enacted. For example, there is a *strategic* element to the Large Group Interventions that focus on proactively creating the future together; these interventions are prime locations of strategic practices, since they are often designed to facilitate strategy implementation and wider strategic change. In addition, participants in the Large Group Interventions individually and collectively *make sense* of the interventions and have *feelings* about them. Thus it is well worth academics' while to know more about them.

It is also well worth Large Group Interveners' time to become familiar with academic research that is pertinent to these interventions. Such research provides an opportunity to "see" dimensions of the interventions that might

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Table 1 Examples of Types of Large Group Interventions (cf., Bunker & Alban, 1997, 2006) and Selected Sources for Gaining More Information about Each Type of Intervention

Examples of Large Group methods for proactively creating the future	**Examples of Large Group methods for Systemwide Work Design**	**Examples of Large Group Methods for Whole-Scale™ participative work**
The Search Conference (Emery & Purser, 1996)	The Conference Model (Axelrod & Axelrod, 2006)	SimuReal (Klein, 1992)
Future Search (Weisbord & Janoff, 2010)	Participative Design (Emery & Devane, 2007)	Open Space Technology (Owen, 2008)
Whole-Scale™ Change (Beedon & Christie, 2006; Dannemiller Tyson Associates, 1999)		Work Out (Ulrich, Kerr, & Ashkenas, 2002)
ICA Strategic Planning Process (Spencer, 1989)		The World Café (Brown & Isaacs, 2005)
Appreciative Inquiry Summit (Ludema, Whitney, Mohr & Griffin, 2003)		America Speaks (Lukensmeyer & Brigham, 2005)

otherwise not be noted. Thus we turn now to theorizing regarding strategy, emotion, and sensemaking.

Contemporary Theorizing in Strategy, Emotion, and Sensemaking

Strategy Research Pertinent to Large Group Interventions

Developments in research pertinent to OD in the 1980s were paralleled by an interest in processes of strategy development and change in the developing field of strategic management. It is this research—with its focus on patterns of strategy development and change through time, and its concern for how, if at all, new intended planned strategies of senior executives are developed and implemented to deliver change to the realized strategy of an organization—that is most pertinent to the Large Group Interventions we will discuss (e.g., Chaffee, 1985; Chakravarthy & Doz, 1992; Frederickson, 1983; G. Johnson, 1987, 1988; Mintzberg, 1978; Mintzberg, Raisinghani, & Theret, 1976; Pettigrew, 1985; Spender, 1989). We describe here some of these areas of inquiry, including some brief historical background for them.

In the 1980s, many started to argue that organizations were facing unprecedented changes in their environments and that, as result, the scale and occurrence of organizational change was increasing considerably beyond that studied by earlier OD researchers (Nadler, Shaw, & Walton, 1995). Business environments were increasingly global, competitive, and turbulent, forcing many companies fundamentally to rethink their purposes and directions (Kilmann & Colvin, 1988). Shifts in approaches in OD at that time included the early development of large-scale interventions (e.g., Bunker & Alban, 1997; Schmidt & Manning, 1998) and approaches to organizational transformation, plus an interest in the leadership of change, since this was felt to be a significant factor in the success of transformation efforts (e.g., Bartunek & Louis, 1988; Beckhard & Harris, 1987; Kilmann & Colvin, 1988; Kotter, 1996; Miles, 1997a, 1997b; Nadler et al., 1995; Tichy, 1983; Tichy & Devanna, 1990).

This research interest in transformation and leadership was mirrored in the field of strategy process research, with its particular focus on how strategic change that is "descriptive of magnitude in alteration in, for example, the culture, strategy, and structure of the firm, recognizing the second order effects, or multiple consequences of any such change" (Pettigrew, 1987, p. 668), is formulated and implemented. Early studies on strategy development and change (such as those cited above) had focused attention on the gap that often arises between the formulation and implementation of strategy (Pettigrew, 1992) and the reasons for it. The distinction captured by Mintzberg (1978) and Mintzberg and Waters (1985) in Mintzberg's notion of intended versus realized strategies was represented by a more general questioning of managerial assumptions that strategy interventions (such as corporate planning) will

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achieve a change in intended (planned) strategy and that this will result in a change in realized strategy (what the organization is currently doing). Patterns of strategic change in organizations also revealed that formulation and implementation may become hard to separate as earlier design decisions may be modified or derailed in implementation. In their search for explanations of these findings, scholars coalesced around explanations that saw strategic change processes less as outcomes of rational decision making and more to do with incremental, political, cultural, and social processes, which in turn led to strategic inertia.

Towards the end of the 1980s and into the 1990s, others started to explore these issues in more depth, resulting in the 1990s and 2000s in a particular interest in cognition and sensemaking (e.g., Balogun & Johnson, 2004, 2005; Barr, 1998; Barr & Huff, 1997; Eisenhardt, 1989; Eisenhardt & Bourgeois, 1988; Eisenhardt & Zbaracki, 1992; Gioia & Chittipeddi, 1991; Gioia, Thomas, Clark, & Chittipeddi, 1994; Maitlis, 2005). These studies augmented earlier research by focusing on the cognitive reorientation required of both senior managers developing strategy and others in the organization on the receiving end if taken-for-granted assumptions about the nature of the organization and its competitive environment, and "the way of doing things around here" were to change in the way needed to effect shifts in intended and realized strategies. They also highlighted the extent of political activity such change triggers at all levels of the organization. Different understandings of change proliferate, unexpected outcomes become the norm, and planned processes of change become more incremental as different groups seek to protect their interests.

As such, process studies raise serious questions about the capability of senior executives in organizations to articulate a new strategic intent that requires complex change, including the development of new organizational capabilities (Leonard-Barton, 1992), in response to a shift in the viable basis of competitive advantage in the external environment. They also raise questions about the feasibility of delivering such change in a revolutionary and rapid fashion consistent with the punctuated equilibrium models of change that characterized much strategy research in the 1980s and 1990s (e.g., Miller, 1982; Miller & Friesen, 1980; Miller, Friesen, & Mintzberg, 1984; Romanelli & Tushman, 1994; Tushman & Romanelli, 1985). As a result, it has been argued that to maintain competitiveness, senior managers need to foster ambidexterity, balancing exploration and exploitationin their organizations through time (e.g., Gibson & Birkinshaw, 2004; O'Reilly, Tushman, & Harreld, 2009; Tushman & O'Reilly, 1996), rather than assuming it is possible to effect a shift in strategic direction through deliberate intervention once competitiveness is in decline.

Exploration of processes of strategy development and change also focused attention on the importance of middle managers in both getting significant strategic issues onto the agenda of senior managers to influence strategic

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direction and facilitating change implementation (Balogun & Johnson, 2004, 2005; J. Bower, 1970; Burgelman, 1983, 1991, 2005; Dutton & Ashford, 1993; Dutton, Ashford, O'Neill, & Lawrence, 2001; Floyd & Wooldridge, 1992, 1994, 1997; Huy, 2002; Rouleau, 2005; Rouleau & Balogun, in press; Westley, 1990). Bansal (2003), for example, shows how individuals' championing of natural environmental issues can lead to their incorporation in the strategic agenda of an organization. An important finding in this research (J. Bower, 1970; Burgelman, 1983, 1991, 2005) is that strategic change can occur through bottom-up and emergent processes as a result of middle manager championing of new strategic initiatives, and this can reduce the senior executive role to one of creating official strategies that capture the strategy that has emerged from the activities of operational level managers. Thus different theories of strategy development and change attribute different roles to senior executives: they may act as the instigators and leaders of top-down change or, alternatively, as the shapers of the internal structural context and therefore which strategic initiatives, whether originating in a bottom-up emergent fashion or more top-down, are selected or rejected. The role senior managers play might also depend on the change context. Organizations that fail to change sufficiently to keep pace with their changing competitive environment and thus ossify may then need to implement a step change that requires top-down intervention from senior managers in a way that more ambidextrous organizations may avoid.

Finally, some scholars have focused recently on continuous, emergent models of change (Thomas et al., 2011; Weick & Quinn, 1999). The focus is switched from organizations as largely stable and punctuated occasionally by change to the ongoing actions and interactions that occur as part of everyday organizational life, altering what an organization does, maybe imperceptibly at any one point in time, from moment to moment (Langley & Denis, 2006; Tsoukas & Chia, 2002). These debates about the nature of change have led to other questions about its pace, linearity, and sequencing (Amis, Slack, & Hinings, 2004; Pettigrew, Woodman, & Cameron, 2001). Does radical change need to be rapid or not? To what extent can incremental and continuous changes occur without the interdependencies of existing domains of organizational activity to lead to more radical change? What sequencing of interventions occurs in successful radical (strategic) change? What about degrees of linearity? To what extent is change actually linear or are there frequently reversals and changes of direction?

The questions about the extent to which strategic change has to occur in an "all at once" punctuated equilibrium as opposed to more incrementally may depend on issues to do with modularity, the extent to which a system's components can be segregated and recombined, and the tightness of coupling (Rivkin, 2000; Schilling, 2000; Siggelkow, 2001). The tighter the interactions, the more a change in one component to reestablish fit between an organization

and its environment as competitive conditions shift, the more this will require accompanying changes in the other components for the system to perform optimally (Siggelkow, 2001), consistent with the punctuated equilibrium perspective. However, modularity also enables us to conceive of change as a series of organizational modifications, as long as we acknowledge a temporary performance drop during the transition stage (Siggelkow, 2001) when components are out of alignment, and as long as change does ultimately run through all parts to recreate realignment. And in fact, process researchers do find both types of change present over time. For example, Plowman et al. (2007) showed how both convergent and divergent change can occur through continuous or episodic means.

Strategizing, activities, and practices. While there remains a healthy stream of work that continues to explore processes of strategy development and change (see, e.g., studies by Burgelman), process research has become relatively marginalized in the strategy field as the interest in micro-economic approaches to strategy, and other perspectives such as the resource-based view (RBV; Barney, 1991), has increased. The growing dominance of the micro-economics tradition within strategic management has led to recent calls for a new research approach with a renewed emphasis on the "human being" involved in strategy. G. Johnson et al. (2003, p. 4) argued for an "activity based view" on strategy and strategizing, "an emphasis on the detailed processes and practices which constitute the day-to-day activities of organizational life *and* which relate to strategic outcomes." They argue for the opening up of the "black box" of organizational activity, which process research shows the importance of yet has largely left unopened. This has led to a field of research based on an interest around Strategizing Activities and Practices, or Strategy as Practice (SAP). The field is united around an interest in the advancement of knowledge and understanding of strategy as something people *do* and not just something organizations have, and therefore the work involved in doing strategy and strategizing (Jarzabkowski et al., 2007; G. Johnson et al., 2007; Whittington, 2006). Empirically the focus is on the day-to-day-work, activities, and practices of strategists, with an interest in how this work socially accomplishes a wide range of individual and organizational outcomes, and how it is also embedded in and relates to broader institutionally accepted practices and trends. The focus on "strategists" also brings individuals beyond senior and middle managers, such as consultants, into the research frame.

While SAP has an interest in a wide variety of strategic activity, the SAP perspective encourages us to explore the implementation of strategy as a "translation into collective action" (Mintzberg & Waters, 1985). In other words, effecting strategic change is about translating strategic thinking into strategic acting by adjusting the current realized strategy of an organization to meet the requirements of the intended action. This in turn requires changes

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beyond structures and systems to the patterns of behaviors and interactions within an organization, and requires a focus on the detail of actions, activities, practices, and systems, including those of leaders (Balogun & Floyd, 2010; G. Johnson, 1988). Such an approach is consistent with scholars (e.g., Burgelman, 1983, and those researching ambidexterity in organizations) who argue that the role of top managers is to set a guiding context that enables change. The new capabilities and competencies an organization requires cannot be imposed top down nor imported through adding a few new individuals, since an organization's capabilities are embedded in the ways people behave, interact, talk, and negotiate (Leonard-Barton, 1992).

Strategy process and SAP research therefore suggest several questions that can guide examination of the case examples of Large Group Interventions in ways that can throw light on current thinking about strategic change.

- *Complexity of change*: To what extent do Large Group Interventions address change of the complexity, scale, and scope that characterizes strategy process research? Can they be considered to represent attempts to change both the intended and realized strategy of an organization, or do they typically represent more incremental changes within an existing strategic direction?
- *Relationship between intended and realized strategy*: In the instances when large-scale change interventions can be considered to represent attempts to effect change in the strategic direction of an organization through the development of a new intended strategy and its implementation, is there evidence that they succeed in doing so? What is the relationship between decisions made during Large Group Interventions and what is eventually implemented? Can we compare examples of successful and less successful Large Group Interventions as in strategy process research to understand if, when, why, and how (or why not) intended change processes resulting from the interventions become derailed?
- *Social, political, and cultural processes*: What kinds of roles do political, cultural, and social processes play in the design and enactment of Large Group Interventions and their implementation? How and why do changes occur?
- *Timing*: Many Large Group Interventions are designed in ways that assume "short bursts" of major change within facilitated by two to three day events, similar to punctuated equilibrium models. What are the timing issues before and after the short bursts? How does the apparently intentional, linear character and rapid pace of the designed changes compare to the pace, linearity, and sequencing of the changes that result? Are there patterns in the sequencing of actions that lead to successful change? What kinds of changes are top down? What kinds are bottom up, unexpected, and emergent?

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- *The whole system and modularity*: Large Group Interventions are designed to get the whole system in the room. But is there actually modularity there? Do interdependent subgroups form to carry out planning and implementation in ways that do not require very much interaction with others? Are there linking activities present that ensure that all organizational components are realigned? What kinds of overlap issues occur during implementation of change?
- *Activities, patterns, and relationships*: Consistent with the focus within SAP on the detailed actions and activities, how are shifts in patterns of behaviors and interactions within an organization effected as a result of Large Group Interventions, and what is actually occurring within and between the different sets of stakeholders involved in the design and enactment of interventions to explain the patterns of change delivered? How are the activities, roles, and discourses in the Large Group Interventions connected to and embedded in taken-for-granted industry practices? To what extent does this structure and legitimate the interventions and to what extent does it limit and constrain the activities and participants? What are the different roles of the multiple actors involved in the Large Group Interventions?

The Emotional and Cognitive Experiences of Change Recipients

From the early part of the twentieth century, beginning with the Hawthorne studies (Mayo, 1946; Roethlisberger & Dickson, 1939), scholars have explored social dynamics and their psychological effects on organizations (Scott, 2007). Early OD research and practice similarly emphasized humanistic values in the workplace, often focusing on the social relationships and personal needs of workers (e.g., French & Bell, 1995; Friedlander & Brown, 1974; Walton & Warwick, 1973). However, beginning with Lewin (e.g., Coch & French, 1948; Lewin, 1951), the primary affective experience that many authors have emphasized was resistance. This emphasis, and the importance of "overcoming" resistance, became more pronounced with the development of transformational change interventions in the 1980s (Kilmann & Colvin, 1988). Authors have often assumed that change recipients are inherently resistant to organizational change, and investigated ways to manage and mitigate it (e.g., Ashford, 1988; Diamond, 1986; Reger et al., 1994; Sagie & Elizur, 1985). This approach assumes a management-oriented, top-down perspective on organizational change, without full understanding of change recipient perspectives (Ford et al., 2008; Meston & King, 1996). For example, scholars have presumed that organizational change is always necessary and appropriate, taking the "change agents know everything" approach (Ford et al., 2008; Meston & King, 1996; Powel & Single, 1996), and that there always exists the optimal, objective solution for organization that employees are currently missing (cf., Bushe & Marshak, 2009).

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Since the 1990s, academic interest in the cognitive and emotional processes of individuals in organizations has increased (e.g., Bernerth, Armenakis, Feild, & Walker, 2007; Lines, 2004; Piderit, 2000). Studies of sensemaking (e.g., Gioia & Chittipeddi, 1991; Maitlis, 2005; Weick, 1995) and emotion (e.g., Barsade, 2002; Seo, Barrett, & Bartunek, 2004; Seo, Bartunek, & Barrett, 2010; Staw, Sutton, & Pelled, 1994) have become more prominent. Studies of sensemaking, which generally refers to the interpretive process through which people assign meanings to their experiences (Weick, 1995), have offered rich explanations of how people socially construct the experience of external cues, exploring their dialogues, narratives, identity, and identification (e.g., Maitlis, 2005; Weick, 1995, 2001). Similarly, studies of positive and negative emotions of individuals as consequences of external cues and as antecedents to their attitudes and behaviors have broadened the understanding of reasons individuals behave as they do (e.g., Schwarz, 2000; Seo et al., 2004; Staw et al., 1994).

The range of studies of sensemaking and emotion is wide (e.g., Gioia & Thomas, 1996; Huy, 2002; Kiefer, 2005; Luscher & Lewis, 2008; Maitlis, 2005; Maitlis & Sonenshein, 2010; Sanchez-Burks & Huy, 2009; Vince & Broussine, 1996). We will focus only on studies that are likely to be directly pertinent to the experiences of participants in organizational change efforts such as Large Group Interventions.

Emotional experiences of change recipients. In recent years, the view that the default reaction of participants to change is resistance has been challenged (cf., Dent & Goldberg, 1999; Ford et al., 2008). It has begun to be recognized that change recipients do not automatically react negatively to change, that resistance might sometimes be quite appropriate and helpful (e.g., Maurer, 2010), and that change recipients may experience positive emotions during organizational change, including happiness, pride, enjoyment, and enthusiasm (e.g., George & Jones, 2001; Huy, 2002; Kiefer, 2002, 2005; Spiker & Lesser, 1995; Stanley, Meyer, & Topolnytsky, 2005; Sullivan & Guntzelman, 1991).

When change recipients perceive the support, trust, and fairness that are antecedents of positive emotions (e.g., Ashkanasy, Hartel, & Daus, 2002; Eisenberger, Stinglhamber, Vandenberghe, Sucharski, & Rhoades, 2002; Fisher, 2000; Murphy & Tyler, 2008), they experience pleasant and happy feelings, which lead to cooperative attitudes toward change (Kiefer, 2002; Kim & Mauborgne, 1998; Lines, Selart, Espedal, & Johansen, 2005). Moreover, Liu and Perrewé (2005) argued that change recipients experience highly positive emotions when they perceive organizational change as congruent with their personal goals and as having a high potential for success and growth.

There has also been more awareness in recent years of how uncertainty plays an important role in emotional experience. Organizational change is an uncertain process for both change leaders and change recipients, particularly in its beginning stages, when change recipients cannot estimate the likelihood

of a certain event, lack information about the situation, and typically cannot predict what the outcomes of change-related decisions will be (Berger & Calabrese, 1975; Bordia, Hunt, Paulsen, Tourish, & DiFonzo, 2004; Milliken, 1987). Uncertainty is generally experienced as aversive, and elicits negative emotions such as anxiety, threat, and fear (Bordia et al., 2004; Schuler, 1980) because it makes people feel vulnerable and insecure about the situation (DiFonzo & Bordia, 2007). Recipients may often be more sensitive to uncertainty than to organizational change itself.

Change recipients may also experience negative emotions because of inappropriate change management by change leaders (Balogun, Bartunek, & Do, 2010). Ford et al. (2008) and other scholars emphasize change agents' contributions to the occurrence of resistance, such as broken agreements, the violation of trust, and communication breakdowns. For example, change recipients experience anger, anxiety, and disappointment when they perceive injustice and unfairness on the part of change agents, and are often skeptical about management during organizational change (Bernerth et al., 2007; Folger & Skarlicki, 1999; Stanley et al., 2005).

Neither positive nor negative emotions are fixed states that change recipients always experience in the same way. Emotions are transient and evolve over time, so emotion literature has focused not only on between-person differences but also on within-person differences over time (Fisher, 2000). For this reason, scholars have suggested that one's emotional experiences in a certain point of time should be understood as part of a process that embraces a continuous variance of emotions, not as a cross-sectional, single state (e.g., Folkman & Lazarus, 1985; Frijda, 1993; Gross, 1998; Lazarus, 1991). Organizational change involves multiple events over time, during which recipients' feelings and thoughts evolve. For example, at the beginning of a change, its recipients tend to perceive a higher level of uncertainty than at the middle or end of the change process, so their early emotions may differ from their later emotions.

Collective emotions also emerge among organizational change recipients. As change unfolds, change recipients typically share similar experiences that have emotional components. Emotions are contagious under these conditions, as individuals unconsciously mimic others' emotional expressions and come to experience the emotions that mimicking represents (Elfenbein, 2007; Hatfield, Cacioppo, & Rapson, 1994; Laird & Bresler, 1992). They are also contagious when people perceive others' emotions as appropriate and desirable for the given situation (e.g., Adelmann & Zajonc, 1989; Schachter & Singer, 1962; Sullins, 1991). Finally, emotions also become contagious during uncertainty; when change participants perceive a lack of information and high uncertainty about their situation, they become more receptive and sensitive to emotional signals from others (Hatfield, Cacioppo, & Rapson, 1993).

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Thus change recipients are likely to experience common, collective emotions, and these in turn have been shown to impact group-level thinking, behaviors, and performance (Barsade, 2002; Van Zomeren, Spears, Fischer, & Leach, 2004; Weiss & Brief, 2001). The collective emotions of change recipients influence their actions, such as collective turnover if they are very upset about poorly managed change processes (Balogun et al., 2010)

Cognitive processes of change recipients. Scholars have focused on the sensemaking of change leaders more than of change recipients (Maitlis & Sonenshein, 2010). For example, Gioia and others (Gioia & Chittipeddi, 1991; Gioia & Thomas, 1996) focused on senior managers' sensemaking and sensegiving during organizational change. Balogun (2003) and Balogun and Johnson (2005) explored the sensemaking of middle managers, who serve as a change recipients and as mediators between senior managers and employees. But sensemaking processes of change recipients who directly carry out organizational change are critical in the implementation of the change (Maitlis & Sonenshein, 2010; Sonenshein, 2010). In the following, we aim to give more concrete shape to change recipients' sensemaking by summarizing recent approaches to sensemaking and its implications.

Organizational members often share interpretive schemes or schemata (Bartunek, 1984), common ways of understanding important aspects of their organizational experience. However, organizational change, particularly radical change, often requires new schemas (Bartunek, 1984; Ranson, Hinings, & Greenwood, 1980), what strategy researchers refer to as cognitive reorientation. Thus change recipients are likely to experience dissonance between new and old schemata (Harmon-Jones, Brehm, Greenberg, Simon, & Nelson, 1996; Harmon-Jones & Mills, 1999). In particular, in situations in which schemas are in transition, change recipients are likely to be in an unstable state containing multiple options, alternative meanings, or courses of action without enough understanding of any of them (McKinley & Scherer, 2000). They tend to be in more conscious and less automatic sensemaking modes, as they try to understand what is going on around them (Balogun & Johnson, 2004; Frijda, Manstead, & Bem, 2000; Liu & Perrewé, 2005).

As change recipients make sense of organizational change, they do not merely shift to or accept new ideas wholesale but interpret them according to existing schemas and then gradually develop new understandings (Balogun & Johnson, 2004; Fiske & Taylor, 1991). As Weick (1995) argued, sensemaking is retrospective and grounded in identity. Thus sensemaking about organizational change happens neither by abandoning old schemas nor switching to new ones, but connecting new schemas to their current and past experiences. Thus many studies view organizational change as a continuous sensemaking process in which participants perceive and interpret organizational events by

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combining with their preexisting cognitive and emotional states (Gioia, 1986; Huy, 1999).

This sensemaking process forms the groundwork for appreciating change recipients' perspectives on organizational change. As organizational change unfolds, there is ongoing sensegiving from change leaders and sensemaking by change recipients, through which the recipients construct the meaning(s) of the change for themselves (Gioia & Chittipeddi, 1991; Maitlis, 2005; Sonenshein, 2010). As they construct their meanings of organizational change, change recipients experience decreased cognitive dissonance (Liu & Perrewé, 2005), and shape their commitment and engagement to the organization and its change (Holbeche & Springett, 2004; Milliman, Czapleurski, & Ferguson, 2003).

Sensemaking is also a collective process among change recipients. As individual change recipients strive to make sense of change situations, they seek new information in interactions with others (Kramer, Dougherty, & Pierce, 2004). Corresponding to the conversational and narrative nature of sensemaking, change recipients share their information, opinions, and experience about organizational change (Corley & Gioia, 2004; Gioia & Chittipeddi, 1991; Isabella, 1990), engaging in a collective sensemaking process. Their interactions, and who the interactions are with (change agents, particular sets of change recipients), not only facilitate the sensemaking of individual recipients but also help to develop collective, shared meanings among all those interacting with each other (Morrison & Milliken, 2000). Collective sensemaking facilitates the construction of intersubjectively shared meanings, perceptions, and interpretations (Balogun & Johnson, 2004; Walsh & Ungson, 1991). It is consistent with the concept of 'objectification' that Bartunek, Huang, and Walsh (2008) noted, through which certain perceptions and meanings become a socially constructed reality within a group (Berger & Luckmann, 1966; Zucker, 1977).

However, shared meanings of organizational change constructed by change recipients may or may not be identical to what change agents intend (Sonenshein, 2010; Weick, 1995). This is especially the case when recipients' organizational experiences are dissimilar from change agents' (Bartunek et al., 2006; Dawson & Buchanan, 2005; Sonenshein, 2009), so their context for understanding what is going on is radically different. This lack of shared understandings is a reason that many scholars and practitioners have reported unpredictable or unintended results of strategic change, such as inter-divisional tensions, turnover, and so on (e.g., Balogun & Johnson, 2005; Bartunek et al., 2006). Thus there is recognition of the importance of trying to achieve similar understandings of change on the part of change leaders and change recipients, and this is a reason that Ford and Ford (2008) have emphasized the importance of ongoing conversations between change agents and recipients.

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Positive emotions, positive meanings, and practices. Attention to positive emotions and positive meanings has increased in recent years, primarily led by Positive Organizational Scholarship (POS; e.g., Cameron, Dutton, & Quinn, 2003; Dutton & Glynn, 2008). Scholars have suggested the facilitating effects of positive emotions and meanings of change recipients on their implementation of the change.

When change recipients experience positive emotions, they are more engaged, innovative, and creative (Rock, 2009; Rock & Tang, 2009). They are also more likely to interpret organizational change as favorable than when they experience negative emotions because people tend to make judgments that are consistent with their emotions at the time of judgment (e.g., E. Johnson & Tversky, 1983; Mayer, Gaschke, Braverman, & Evans, 1992), as well as selectively accept information that is congruent with their current positive emotions (Forgas, 1995). For this reason, people experiencing positive emotions are more likely to interpret organizational change positively, focusing on hopeful and encouraging information regarding the change. They are also more likely to interpret change processes as challenging rather than threatening because positive emotions heighten the self-confidence of change recipients (Bandura, 1982; G. Bower, 1981; Staw et al., 1994).

Positive emotions facilitate sensemaking and lead to the construction of positive meanings (Fredrickson, 1998, 2001), which broaden thought-action repertories and help to build physical, social, intellectual, and psychological resources (Aron, Norman, Aron, McKenna, & Heyman, 2000; Boulton & Smith, 1992; Fredrickson & Branigan, 2005). Thus positive emotions help change recipients make sense of organizational change by broadening possible alternatives to explain particular situations, as well as by maintaining an open approach to problem solving during a change process (Avey, Wernsing, & Luthans, 2008; Baumeister, 1982). Such positive sensemaking has important implications. Sonenshein (2010) showed how change recipients who construct positive meanings of organizational change voluntarily strived to make the change successful by sensing and rectifying problems in the change process.

Academic investigations of change recipients' emotions and sensemaking suggest several questions that can be asked about Large Group Interventions. These include:

- *Experienced emotions*: What are the various emotions experienced by planners and participants in Large Group Interventions prior to, during, and after the Large Group events? How are these positive and negative emotions guided or managed during the events? Then how do they, in turn, influence their attitudes and responses to the change aftermath?
- *Emotional contagion*: How are emotional contagion and collective emotions manifested during and after the interventions? How do change agents work with these?

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- *Occasions for sensemaking*: What are the occasions in Large Group Interventions in which participants typically "make sense" of what is happening? Does their sensemaking evolve beyond the intervention, and if so, how?
- *Interactions between sensemaking and sensegiving*: How do sensegiving and sensemaking interact during and after the interventions? What is the nature of the storytelling triggered by the interventions and what is the importance of this in facilitating the change process?
- *Positive emotions and positive meanings*: How do positive emotions and positive meanings arise during the Large Group events? How are they related to participation in intervention? How do they affect the outcomes of the intervention and change?

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Case Examples of Large Group Interventions: Future Search and Whole-Scale™ Change

We will address in depth two examples of Large Group Interventions—Future Search and Whole-Scale™ Change—including their underlying frameworks and extended examples of how they have been used. Both of these interventions fall into the category of methods for proactively creating the future together (Table 1), and both of them contain strategic components. Further, both of them have been used all over the world and are important because of the large number of consequential situations in which they have played important roles. We do not claim that these are representative of all Large Group Interventions. But they are representative of Large Group Interventions that have been used widely over several years and, according to their participants, successfully (Shmulyian et al., 2010).

First we will describe each intervention in some depth and give an example of its use. Next, we will use the questions we have presented above to highlight aspects of the interventions that link with strategy, cognition, and emotion research, and make these links more explicit.

Future Search

Future Search (http://www.futuresearch.net/) is a future-oriented planning conference developed in the 1980s by Marvin Weisbord, Sandra Janoff, and their colleagues (Weisbord & Janoff, 1995, 2010). Its purpose is to "explore possible agreements between people with divergent views and interests and to do consensus planning with them" (Bunker & Alban, 1997, p. 43). Future Search is based on theories and principles derived from action research regarding problem solving and planning. The core principles that are most important to it are getting the whole system in the room, a global context for local action, focusing on the future and common ground rather than problems and conflicts, and self-management and responsibility for action (Weisbord & Janoff, 2010, p. 47).

Future Search usually takes place in three-day conferences that are preceded by extensive planning and then succeeded by several months of implementing plans developed during the conferences. Designers recognize that despite the fact that the most intense time occurs during the conference, there must be planning time and implementation time scheduled for before and after the large group event for the Future Search conference (or any of the large group methods) truly to be a success (Bryson & Anderson, 2000).

As Bunker and Alban (1997) and Holman et al. (2007) note, Future Search conferences are highly participative; they include the full participation of a wide range of stakeholders who can contribute to an issue and/or have a stake in it, from within and beyond the organization. The average size of Future Search conferences is approximately 60–80 people (Weisbord & Janoff, 2007b).

Six major tasks take place during the three-day Future Search conferences (http://futuresearch.net/method/methodology/index.cfm). The first task is for participants to focus on the past with regard to the Future Search topic and other events. They individually create timelines of key events in the world, in their own lives, and in the history of the Future Search topic, and then, in small groups of diverse participants, look for themes or create a story about one of the decades on the timelines.

The second task is to focus on the present. The whole assembly makes a "mind map" of trends currently affecting the Future Search topic and identifies the trends most important for it. Third, the participants form stakeholder groups in which they discuss what they are doing now about these key trends and what they want to do in the future. Stakeholder groups report what they are proud of and sorry about in the way they are dealing with the Future Search topic.

Starting on the fourth step, they focus on the future. Diverse groups imagine and describe their preferred future as if it has already been accomplished. Fifth, based on hearing the preferred future, the groups post themes and discuss and agree on the common ground for everyone. The sixth and final step is action planning. After action plans are developed, volunteers sign up to implement them over the coming months.

Weisbord and Janoff (1995, 2007b) recognize that Future Search conferences may bring a range of emotions, both positive and negative. They comment (2007b, p. 321), for example, that "We experience the conference's peaks and valleys as an emotional roller-coaster ride… swooping down into the morass of global trends, soaring to idealistic heights in an ideal future. Uncertainty, anxiety, and confusion are necessary byproducts; so are fun, energy, creativity, and achievement." They add that "Commitment builds as we encounter chaos together, hang on despite our anxiety, and come out the other side with some good ideas, people we can trust, and faith in our ability to work together. In short, we uncover buried potential that already exists" (p. 323).

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Future Searches have been used successfully in a large number of organizations. For example, Boeing used a version of it in the design of its 777 aircraft (Bunker & Alban, 1997). IKEA used Future Searches that started with a single product (a sofa) and that led to a review of the entire system, a new strategic plan, and the eventual use of Future Search processes for other purposes, including improving supplier relationships and developing sustainability initiatives (Weisbord & Janoff, 2005, 2007b, 2010). A Future Search intervention helped 3M carry out union-management joint planning (http://www.futuresearch.net/method/applications/world/north_america/3m.cfm).

A Future Search Case: Future Search and the Federal Aviation Administration

Weisbord and Janoff (2006) give an extended illustration of how Future Search was used with the United States Federal Aviation Administration (FAA) to address a crisis situation. "Air traffic patterns over the United States … had become an interlocking web," where "delays anywhere in the system could ground planes thousands of miles away" (p. 178). The FAA decided to use a Future Search to see if they would find a way around this conundrum, to rethink "airspace design and traffic control" (p. 178), and they contacted Weisbord and Janoff to lead the gathering. Other planning approaches had not succeeded; they had simply generated political controversy. The hope was that a Future Search meeting could enable airspace users to "agree on a set of 'minimum critical specifications' to avoid gridlock" (p. 178).

The planning group for the meeting included representatives of multiple stakeholder groups, including the National Business Aviation Association, FAA representatives, airline industry representatives, air traffic controllers, and others concerned about airspace. This group listed more than 90 stakeholders, including national and regional airlines, other types of flyers (such as the military), and customers. Representatives of all these stakeholder groups were invited to participate in the Future Search conference.

Ultimately, 60 stakeholders accepted the invitation to participate in the conference. They represented a good cross-section of the stakeholder groups that had been identified. The FAA Administrator gave an opening talk at the conference and agreed to be present for action plans. She urged participants to accept responsibility for collaborative decisions and made clear to them how serious the issue was.

The conference used a standard Future Search approach. Individual participants began by writing key points on three posted timelines covering personal, global, and air traffic system issues. Groups composed of diverse stakeholders were assigned a timeline to study and brought to the entire assembly the implications of the timeline for the work. For example, the group studying the global timeline noted trends towards globalization, advanced technology, higher security concerns, cyclical conflicts, and fluctuating fuel costs.

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Next the participants identified present trends affecting air traffic operations. Recorders listed these on a large mind map that all the participants were facing, and everyone had a chance to contribute to the list of trends. After the list was completed, the individual participants placed colored dots on issues they felt ought to be considered.

Next stakeholder groups created their own maps that showed connections among the key trends of greatest concern to them. They also added to the maps what their stakeholder group was doing about the trends and what they were not doing but wanted to do. The assembly then shared this information together, and as they discussed it they realized that it was essential to accomplish something that no one had yet been able to do: "problem solve in a spirit of collaboration and interdependent support from all stakeholders" (p. 182).

The stakeholder groups then described what they took pride in about they own behavior and what they were sorry about, including "parochialism and turf protection—internally and externally" (p. 183). This sharing, which was deep and important, led to a pivotal dialog, as people "began voluntarily to soften adversarial positions" (p. 183).

Next participants returned to the diverse groups in which they had originally worked. Here they were asked to imagine a future situation in which there would be an air traffic operations system that was technically feasible, would benefit society, and be personally motivating. They were asked to describe what this might look like and what actions they had taken that would help accomplish it.

They created several scenarios as part of this exercise. Afterwards, they wrote down what they considered "common ground" for everyone present, what everyone agreed on, and, after discussion, developed several areas of shared agreement. One issue—financing—could not be agreed upon. It would require further work beyond the conference.

Finally, on the last morning of the conference, groups selected "common ground themes to translate into policies, programs, procedures and structures" (p. 185). Five groups formed to develop action plans around issues they were interested in working with, and they continued their work after the conference ended.

Weisbord and Janoff (2007a) noted that this work was very successful. It led to a new system access plan that enabled the FAA to relieve congestion based on system-wide data, an express lane strategy to be used when airports experienced 90-minute delays, and elimination of a first come first served policy of routing airlines by enabling air traffic controllers to make systemic decisions. This substantially assisted in achieving the FAA's goal for the conference, and was certainly much more successful than any prior planning effort had been. An FAA press release called the outcomes of the conference a minor miracle (http://www.futuresearch.net/network/activities/index-58284.cfm)

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Whole-Scale™ Change

Whole-Scale™ Change (http://www.wholescalechange.com/), which was developed by Kathy Dannemiller, Robert Jacobs, and others (Dannemiller Tyson Associates, 1999; Jacobs, 1994; Vonofakou et al., 2008), has been used for a variety of applications, including strategic planning, work design, re-engineering, training, and culture change (http://www.dannemillertyson.com/ferranti.php). It is a registered trademark of Dannemiller Tyson Associates. One of the distinguishing features of the approach is its flexibility in dealing with large and small groups and in addressing a wide variety of systems issues. Whole-Scale™ thinking can be used to unite and mobilize people in organizations and communities around nearly any kind of convening issue.

An adaptation of Gleicher's formula for change (Beckhard & Harris, 1987), $D \times V \times F > R$ (DVF), guides the Whole-Scale™ Change approach (Bunker & Alban, 1997; James & Tolchinsky, 2007; http://www.wholescalechange.com/methodology.html). This rubric posits that if an organization wants to accomplish system-wide change, it must work with a critical mass of the organization to uncover and combine member dissatisfaction (D) with the present state, uncover and combine yearnings for their Vision (V) of the future, and take first steps (F) towards reaching the vision. The values of D, V, and F all need to be greater than zero in order to be greater than people's resistance (R) to change.

For Whole-Scale™ Change to be conducted successfully, there must be a clear purpose to be accomplished. In addition, a core leadership team must be committed to accomplishing this purpose, an event planning team whose members are a microcosm of the planned meeting must prepare the Whole-Scale™ event, and there must be a logistics team. There must also be participation on the part of large numbers of organization members who are willing to work with other members they may not originally know.

James and Tolchinsky (2007, p. 168) describe the Whole-Scale™ Change process as a "never ending journey, a continuing cycle" of several steps. In brief summary, during Whole-Scale™ Change, these steps include building a common database of information, determining what the data mean for the organization, agreeing on change goals, committing to specific actions, and taking time to check and measure what was agreed upon. The steps are accomplished through a "series of small and/or Large Group Interactions … Through microcosms, groups representing the range of stakeholders, levels, functions, geography, and ideas in the organization, Whole-Scale processes simultaneously work with the parts and the whole of the system to create and sustain change" (James & Tolchinsky, 2007, p. 165).

The assumption of Whole-Scale™ Change is that while emotions may be difficult at first, they will, as a result of the process, end up being very positive.

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For example, James, Carbone, Blixt, and McNeil (2006) described a Whole-Scale™ intervention aimed at integrating two education unions in Florida in which initially, and during early parts of the process, there were conflicts and a lack of trust. As a result of the Whole-Scale™ Change, however, intergroup trust increased considerably and energy became high. Whole-Scale™ Change was also used to help five predecessor organizations create a high-performing health organization within the UK National Health Service (Beedon & Christie, 2006). James and Tolchinsky (2007) state that that one common outcome of Whole-Scale™ Change projects is that organization members feel more and more empowered as they see that their voices can be heard, so much so that they may end up feeling euphoric (Dannemiller Tyson Associates, 1999).

Whole-Scale™Change has been used in other settings, including the U. S. Central Intelligence Agency (M. Johnson & Tolchinsky, 1999); Covenant HomeCare, a comprehensive home care services organization (James & Tolchinsky, 2007); Ferranti-Packard Transformers, an Ontario, CA, manufacturing plant that was a subsidiary of Rolls Royce (http://www.dannemillertyson.com/ferranti.php); and Ford Motors, where the method was first developed (Bunker & Alban, 2006). We will present an extended example of its use at Best Friends Animal Society (http://www.bestfriends.org/). This example is summarized briefly on the dannermillertyson. com website, http://www.dannemillertyson.com/clients.php#bf. Al Blixt, a senior partner at Dannemiller Tyson Associates, described it in detail to Jean Bartunek in October 19, 2010. The following description is taken from his account and the Best Friends website.

A Whole-Scale™ Change Case: Whole-Scale Change with Best Friends Animal Society

The founders of Best Friends Animal Society (http://www.bestfriends.org/) came from England to North America in the 1960s. Their aims for the work they wanted to do were humanitarian and altruistic, and after trying different ideas, they became more and more certain that they wanted to work with animals. In 1984, they were able to purchase land to create an animal sanctuary at Angel Canyon in Kanab, UT, and began their sanctuary, Best Friends, there. As they state on the Best Friends website, one of their main aspirations is to place dogs and cats who are considered "unadoptable" into good homes and to reduce the number of unwanted pets through effective spay and neuter programs so that over time no animals will be euthanized due to there being no place for them to go.

The sanctuary began with about 18 people (the founders) and with only basic means of gaining funding. Over time, however, it started to build a more effective marketing campaign and many more people joined the founders in working at Best Friends. By 2004, there were 300 people working there, caring for close to 2000 animals.

The founders had had no management training; Best Friends was purely mission driven. Further, by the early 2000s, most of the founders were in their 60s. They realized that Best Friends desperately needed more structure and professional management, but feared that it would not be possible to accomplish this without losing their mission. They contacted Dannemiller Tyson associates because of its work in the non-profit sector and asked them to help serve as consultants.

Three Dannemiller Tyson associates, Al Blixt, Sylvia James, and Mary Eggers, consulted with Best Friends. They met with the leadership team (eight founders and two additional leaders) in December 2004 concerning its desire to create a more structured organization with a mission plan and accompanying strategy along with some type of (non-hierarchical) organizational structure and an external board of directors. With the help of the consultants, the leadership team developed an interim solution to these issues, a draft organization design, along with a high-level strategy and strategic goals.

They then convened a large-scale event for early January for 50 people who were in some type of leadership position. Following the standard model for Whole-Scale™ interventions, the 50 people sat in mixed tables of approximately six people each.

At the beginning of the two-day event, each person had a brief period of time to consider some of their own experience with Best Friends, what they would most want out of the two-day gathering, and then introduce themselves to their group. Together they listed common themes, significant differences, and outcomes their table wanted. Each table reported these to the whole assembly. Then they listened to panel presentations by a range of stakeholders of Best Friends who each described the value that Best Friends creates and why they cared about it. The tables discussed what they heard and their reactions, and then posed burning questions for the panelists.

Next individuals brainstormed about what made them glad, sad, and mad when they thought about Best Friends during the prior year. They divided these into specific themes (communication, employee morale, etc.). The tables were then assigned the tasks of organizing all the comments about one of the themes for the whole assembly. These were posted, and individuals were asked to note the most important sads, glads, and mads for themselves.

After lunch, the transition leadership team presented a draft strategy, and tables discussed their reactions to it and asked questions of the transition leadership team. Next the tables discussed what they agreed with in the strategic plan and what they would like to change and why. They posted this for all to see. Finally, at the end of the day, they noted how strongly they agreed with each recommendation. The leadership team met in the evening to consider this information and to make changes as necessary.

The next morning, the leadership team distributed a new plan along with specific strategic goals and told the assembly what they had heard from the

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groups about what should be changed. They described what they changed and why and what they didn't change and why. The groups discussed this presentation until everyone reached consensus.

Next the consultants introduced the DVF rubric, and individuals brainstormed their own vision of success in terms of each of the strategic goals. The groups agreed on statements for the future and brainstormed everything they saw going on at Best Friends that would make it easier to get to their preferred future and more difficult to get to it. Based on this brainstorming, they agreed in tables on the most important actions that could help them move toward their preferred futures and posted these for the whole assembly. After this, individuals registered which posted actions were highest priority and which were lowest. These were then presented, and the groups then moved into transition planning for the new structure. The leaders agreed on next steps in the development of the structure.

A month later, during the first week of February, 2005, this process was repeated twice: once for the first half of all the employees at Best Friends, and then for the second half of the employees. (It would have been ideal to have one session for all 300 employees, but it was not possible to leave the animals uncared for.) It was out of these large group meetings that arose the conviction that Best Friends wanted to be more than a sanctuary; they wanted to change attitudes about animals and make it non-acceptable not to neuter them. Also at the meeting and then more fully after it, the participants developed a new circular organizational structure, one that included people working together in teams.

At the February meeting, the participants also developed a "rapid response" team, one that would be able to mobilize quickly to respond to emergency situations. When Hurricane Katrina hit the U. S. Gulf Coast less than seven months later, in August 2005, the rapid response team was mobilized, and through its initiative, Best Friends was able to save close to 1000 pets (http://mlmiller.myweb. uga. edu/project/tylertown/rainbow. htm; http://news. bestfriends.org/index.cfm?page=specialreports&mode=cat&catid=04061773-bdb9-396e-9001ef6ec01318a4). The response, which involved 100 of the employees, slowed down the full implementation of the new structure, and work on the restructuring had to be renewed in 2006, after the last of the employees returned from the Gulf region. In 2008, the rapid response group also enabled Best Friends to rescue 22 pit bulls seized from the property of Michael Vick that had been part of his dog fighting ring (http://www.bestfriends.org/vickdogs/).

Similarities and Differences between These Large Group Interventions

There are both similarities and differences between these two Large Group Interventions. On the surface, they appear to have much in common, but they are not identical, and the differences between them are central to their designers' conceptions.

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Both interventions include short, intense, and carefully planned meetings of two to three days, preceded by considerable planning and followed with implementation tasks. Both incorporate the perspectives of external stakeholders, although Future Search more explicitly includes external stakeholders as participants in the planning process while Whole-Scale™ invites them to make presentations. Both take the past into account, as well as incorporating what participants are glad or sad (or mad) about. However, Whole-Scale™ Change focuses on the past year, while Future Search focuses on a longer time horizon. Future Search begins with a focus on the past, while Whole-Scale™ Change begins by focusing on current experiences.

Both approaches include individuals working in "mixed," diverse groups. Future Search explicitly alternates diverse group experience with individuals working in similar stakeholder groups. This may or may not happen in Whole-Scale™ Change, depending on the type of issue being addressed.

Future Search events are very democratic. Thus leaders need to decide in advance what is on the table for discussion or not. In Whole-Scale™ Change, there is more opportunity for lower-level organizational members to interact with leaders, but this interaction is consultative rather than decision making

Planning takes place in both types of interventions. However, in Future Search the whole group develops something new, while in Whole-Scale™ Change a leadership group develops draft plans to which the whole assembly responds and the leadership group has final say.

There are careful logistics in both groups, but the logistics for planning are more spelled out in Whole-Scale™Change. The optimum size of the group is 60–80 people in Future Search, while Whole-Scale™Change can handle 1000s of participants at once.

Both incorporate multiple hierarchical levels of participants and enable them all to affect planning, though the impacts of lower-level participants are less in Whole-Scale™ Change. Both developed originally in the 1980s and 1990s, and some details of their approaches have evolved since then, though the major frameworks have not. The developers of Future Search have introduced a method for planning meetings, as well as for Large Group Intervention activities (Weisbord & Janoff, 2007b). Finally, both focus implementation on what participants (come to) basically agree on. There are not major conflict resolution steps incorporated in them.

The similarities and differences between these two approaches suggest some of the multiple design decisions that need to be made about any one of these change efforts, and how the design must cohere in several areas in order for the intervention to succeed. They also make evident that planning interventions requires considerable skill and experience.

Sometimes, because the steps of the interventions are published, readers may be under the illusion that these interventions are easy to accomplish following a kind of "by the numbers" approach. However, there is considerable

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skill and artistry involved in implementing these interventions successfully (Shmulyian et al., 2010). Rote carrying out of the steps leads to very poor interventions.

Scholarly Questions Applied to the Large-Scale Changes

Designers of the Large Group Interventions appear to be developing ingenious solutions to dilemmas of change and doing so in many crucial contexts. Furthermore, it appears that, at least from the designers' and participants' perspectives, these interventions often succeed (Shmulyian et al., 2010). They do so to the extent that they develop shared commitment to change across stakeholder groups, shared visions that participants find exciting and engaging, and shared understanding of what needs to happen in the organization if the vision is to become a reality. In addition, the interventions provide sets of solid and tangible lists of actions that can form the basis of an implementation plan.

At the same time, despite the many reported successes of Large Group Interventions, it is evident that organizational change often runs into problems, especially when it is major. Many put failure rates at around 70% (Axelrod, 2010; Beer & Nohria, 2000). Further, there is evidence that Large Group Interventions sometimes fail. Shmulyian et al. (2010) suggest that failure is particularly likely if only some of the important stakeholders participate, if autonomous units with no interrelated tasks participate together, if there is inadequate organizational sponsorship for change, and if change agents are not skilled.

The research we discussed above raises other important issues about how change occurs and what inhibits and facilitates it. The conclusions generated by strategy process and emotion and sensemaking literatures suggest many questions that advocates of Large Group Interventions may find helpful to consider to be able to explain why it is that their Large Group Interventions are successful (or not) and how they solve typical problems encountered during organizational change.

From an organizational scholarship perspective (rather than other conceptual perspectives that inform change agents such as neuroscience, cf., Axelrod, 2010), the large scale changes are "under theorized." That is, while the change processes are very carefully designed and scripted, they also include ongoing processes that are not explicitly acknowledged by Large Group Intervention designers, but that almost certainly have impacts on the course of the interventions. Many of these processes can be illuminated by scholarship such as we have presented, and the interventions may, in turn, illuminate scholarship in these areas. Thus we will now revisit the questions we raised above, this time from the perspective of the interventions.

Revisiting Questions About Strategy

The strategic questions we have posed above, in conjunction with the description of the Large Group Interventions, raise issues regarding their scope of

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change, the relationship between their formulation and implementation, and the experiences associated with various types of roles and timing issues. Some of the questions that arise are for the Large Group Interventions, while others are for strategy researchers.

Complexity of change. We begin with questions about the extent to which Large Group Interventions address strategically complex change such as that studied by strategy scholars and, therefore, can throw light on issues of interest to these scholars. How do they, if they do, overcome problems identified with such change, for example, cognitive reorientation, politically driven agendas, and the development of new organizational capabilities?

Certainly it would seem that the FAA Future Search intervention was operating at a strategic level and did require some cognitive re-orientation towards a willingness to cooperate. Yet it is not clear whether the changes agreed upon represented a shift in strategic direction for the organizations involved. The Best Friends Whole-Scale™ Change intervention seemed to require some level of questioning of fundamental assumptions and beliefs about the mission and how it could be delivered; at least some of the stakeholders, if not all, came to agree that some type of organizational structure was not necessarily antithetical to mission.

It would be helpful to know in more detail how the interventions aimed to and accomplished this. Clearly the sharing of "prouds" and "sorries" in the FAA Future Search intervention had an impact. What was it about this sharing that made the difference, and was the sharing enough in itself? The initiatives described here hint at significant change, and make it evident that they are important for scholars to learn about. Yet without some detail about the inner and outer strategic organizational context, it is hard to gauge the extent of change actually required of different stakeholder groups and how this relates to the overcoming of political interests and the development of new organizational capabilities.

Relationships between intended and realized strategy. There are also questions about the implications of Large Group Interventions for what scholars know about the possibility of planned interventions effecting shifts in both the intended and realized strategies in organizations, particularly given that the examples suggest that they put primary emphasis on formulation, on dialogic issue appraisal (cf., Marshak, 2010) and solution design, with implementation as a subsequent phase. Even if these interventions do lead to the formulation of a new planned strategy, how does this overcome the formulation/implementation gap? The interventions do embody "best practice," as advocated in much prescriptive literature on change regarding how to ensure implementation follows on from formulation. They include careful planning and buy-in at the large group event. Further, they often include features such as implementation

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subcommittees to ensure carrythrough after the large group events, and additional sessions to involve those not present in the large group sessions and get their feedback and engagement (Axelrod & Axelrod, 2006). In addition, Weisbord and Janoff (2010) suggest several practices that should help foster success in following up, including frequent reports and newsletters, get-togethers, and review meetings.

Social, political, and cultural processes. Yet the use of these methods may not on its own account for how they prevent change processes being derailed, diverted, or morphed by, for example, political activity. Involvement, consultation, and participation are not panaceas. Some research (e.g., G. Johnson, Prashantham, Floyd, & Bourque, 2010; MacIntosh, MacLean, & Seidl, 2010) suggests that strategy workshops are often meaningless, that there is little that changes in the organization because of them. But the Large Group events, which are forms of such workshops, are described as having considerable impact. What makes the difference? Is it that those interventions require particular skill sets or particular conditions of senior executive readiness? It would help considerably to have examples of both successful and unsuccessful interventions that enable depth of understanding of linkages through time in terms of context, content, process, and outcomes.

Timing. Both of the case studies illustrate episodic assumptions associated with punctuated equilibrium models of change; both of them build up to intense short events and then include implementation that derives from the events. There also appear to be assumptions of linearity in these change processes; there will be follow through on the plans developed at the major event. Further, consistent with standard OD expectations (Cummings & Worley, 2009), there seems to be an assumption that what people help to create they own and will implement faster. Is this always enough? Are the attempts to build in shared learning as implementation takes place (cf., Axelrod & Axelrod, 2006) and periodic additional events adequate to support momentum? Is the resulting change process really linear or are there (often) reversals, diversions, and delays in the journey? That certainly seemed to be the case with the Whole-Scale™ intervention at Best Friends. The Gulf Coast hurricane was clearly an unexpected event that slowed down restructuring.

Alternatively, perhaps Large Group Interventions are successful because they are modeled on punctuated equilibrium notions of change, but actually embody concepts consistent with more continuous change. Weick and Quinn (1999) suggest that notions of continuous change reverse the Lewinian model of unfreeze, move, and refreeze. Instead, in constantly changing organizations, it is necessary to freeze first—bring everyone together around where the organization is currently. The power of the Large Group events could be that by bringing together different stakeholder groups and voices, they are able to achieve this.

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The whole system and modularity. Does the approach of putting the "whole system in the room" discourage appropriate questions about modularity and interdependencies and what should be changed first? Perhaps, consistent with Amis et al. (2004), there are hidden within successful Large Group Interventions certain sequences of actions that correspond to notions of changing high-impact systems first that keep the change moving in a certain direction. The Large Group event might occur all at once, but perhaps the subsequent implementation develops in a more incremental and evolutionary fashion, in a way that would support notions of modularity and more continuous notions of change.

Activities, patterns, and shifts in behavior. Furthermore, strategy scholars typically have to research change as it is designed and implemented by managers in the organizations they gain access to. While strategy researchers might argue that strategic change cannot always be separated neatly into formulation and implementation, many senior executives and the strategy consultants they work with still operate in a dualist epistemology that splits strategy into thinking (largely done by senior executives) and doing (largely the preserve of others). And many executives might argue that when organizations need to undertake a step change in strategic direction, which represents a break with the past, this is a necessary approach. The Large Group Interventions may offer an opportunity to research a different change context. The success of Large Group Interventions may reside in the fact that they are more consistent with a constructionist epistemology in which thinking, talking, and acting co-occur, bringing formulation and implementation simultaneously into the room. This seemed to be the case more with the FAA than with Best Friends, where senior managers still retained most of the formulation of the structure and the emergent hurricane event had an impact on success.

The Large Group Interventions we have discussed intentionally involve all key stakeholder groups, including senior and middle managers and lower-level employees. The nature of the involvement differs in different types of Large Group Interventions, as was indicated in the two examples we presented. The senior managers at Best Friends took a fairly active top-down role in the structural redesign in the Whole-Scale™ Change effort. Everyone played apparently equal roles in the Future Search FAA Intervention, though the types of roles they played during implementation of the change are less known. Thus there is still much that is not known about how the roles of seniors and middles (and others) are juxtaposed and changed in these interventions.

Research in SAP is starting to reveal more about the roles of some stakeholders. Scholars know, for example, that informal interactions between different stakeholder groups outside of the formal meetings may be as important, if not more important, than formal meetings (Hoon, 2007; Sturdy, Schwarz, & Spicer, 2006). Indeed, both interventions show significant levels of behind the

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scenes interactions. A growing body of research also shows the importance of influencing through skilled practice by those without the formal authority held by senior executives (cf., early work by Dutton and colleagues and more recent work by Balogun and others referenced above). In addition, strategic discourses in which individuals, such as middle managers, are embedded can limit in taken-for-granted ways how they conceive of their roles (Mantere & Vaara, 2008). How do the large group events either incorporate or change these findings? Are roles different during implementation than they are during the Large Group events?

Finally, the interventions described above are shaped by what could be considered to be "best practices," such as stakeholder involvement, good communication, leadership, and so on. These practices seem critical in the success of the interventions described. Yet information is not presented regarding how shifts in patterns of behaviors and interactions within an organization occur as a result of Large Group Interventions, and what is actually occurring within and between the different sets of stakeholders involved in the design and enactment of interventions to explain the patterns of change delivered. Nor is it easy to appreciate the extent to which the incorporation of best practices is important in legitimizing the interventions or, alternatively, constraining them in different circumstances. Again comparison between successful and less successful interventions would be helpful.

Revisiting Questions about Sensemaking and Emotion

The questions about emotion and sensemaking that we have posed address a variety of the experiences of change recipients. These include the types of emotions they might experience, the impacts of these emotions, and the degrees to which the emotions are shared. The questions also address the participants' sensemaking, including how it evolves over time and how it comes to be shared. Again, while some of these questions are particularly pertinent to Large Group Interventions, others are particularly pertinent to research concerning emotion and cognition.

Experienced emotions. First, there are questions of the relationship between Large Group Interventions and change recipients' emotions, particularly the way the interventions generate, influence, and benefit from their participants' emotional experiences. At some points, the interventions stimulate the public expression of both positive and negative emotions. Whole-Scale™ Change participants list "glads, sads, and mads," Future Search participants describe prouds and sorries, and these clearly have an impact; they were a major turning point during the FAA Future Search event. Large Group approaches expect that participants have a multitude of feelings in relation to any planned change effort and offer an opportunity to express those feelings authentically. They view that feeling good about the past does not necessarily

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mean something negative about particular change processes, consistent with scholars' recent suggestions (Ford et al., 2008; George & Jones, 2001).

However, it is not clear how these experienced emotions are changed and managed during the interventions, and in turn how they influence recipients' attitudes, responses, and emotions afterwards. Oels (2002) noted that participants experience considerable mood swings from anger and frustration to pride and positive energy over the course of a Future Search Conference; in the FAA example, the emotional response was like a roller coaster. What do change agents do to enable such a roller coaster, but manage it in such a way that it becomes productive for change? For example, if negative emotions are likely to lead to disengagement, what is done during Large Group Interventions and during implementation phases to re-engage participants emotionally? The effects of emotional experiences are unclear as well. How do emotional experiences change the recipients during and after the intervention? How do they, if they do, influence recipients to overcome uncertainty or to perceive management support or capability for change? For example, how did brainstorming about what made them glad, sad, and mad influence participants' responses toward the change in Best Friends?

Emotional contagion. Large Group Interventions involve an intentionally diverse and large number of people. Sometimes it seems likely that some stakeholder groups (but not others) share common emotions, as was the case in the Florida Education unions (James et al., 2006). Some type of emotional contagion was apparently also generated as a result of the "prouds and sorries" exercise in the FAA Future Search intervention. How are emotional contagion and collective emotions stimulated and manifested during and after change efforts? What aspects of the interventions (such as, perhaps, times for sharing emotions) increase their collectivity? Also, how do these collective emotions in the interventions influence recipients' participation and commitment to the intervention and their collective attitudes and responses toward the change? How do change agents work with collective emotions, especially if the shared emotions are not what would seem most desirable? This is not clear from the descriptions of the interventions.

Occasions for sensemaking. Similarly, the interventions enable occasions in which participants make sense of particular events, such as the opening sessions in which they discuss the past or present state of affairs regarding the topic they are addressing. To the extent that they involve a cognitive reorientation, which seems to be the case in the interventions we addressed, how do they accomplish it from a sensemaking perspective? How do Large Group Interventions contribute to decreased cognitive dissonance between old and new schemata? What, in addition to shared emotional experiences such as those experienced at the FAA Future Search, leads to change in sensemaking?

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For example, in the case of Best Friends, participants ended up making sense of the change to the new structure in the direction the leadership team intended, even though many started at a very different space. How did this occur? What is the relationship between sensegiving and sensemaking in Large Group Interventions? Are there typical times—for example, such as the sharing of prouds and sorries—in which participants typically make sense of the change? How do such experiences relate to storytelling in and around the event? What happens during these times, and the narratives they generate, could be key to the success or failure of the interventions and organizational change.

There has been relatively little discussion in descriptions of these interventions of when groups or subgroups come to share the same sensemaking and meanings. In Future Search, collective sensemaking seemed to be presumed when "common ground" was built during the interventions. However, little has been explored about how fully "common ground" is agreed upon in Large Group Interventions, how it influences development of action plans, and how it is maintained or not throughout implementation. Do participants actually attach the same meanings and therefore implications for action to the shared language they develop in the interventions? Also, how do interventions integrate (possibly) separate shared meanings of change between top management and change recipients, leading the "common ground" for every participant in different subgroups?

Sensemaking and sensegiving. It is noteworthy that the Large Group Interventions involve all stakeholder groups, including senior, middle managers, change agents, and change recipients. However, neither of the cases illustrated how interactions and communications with managers and change agents influenced recipients' emotions and sensemaking. How and what kind of communications across hierarchical levels and stakeholder boundaries influence how recipients make sense of the change? Do shared meanings of change emerge among participants through an iterative process between sensemaking and sensegiving? If so, how? Also, how do emotional experiences interact withsensemaking and sensegiving? Many scholars have noted negative impacts of low quality or breakdowns of communications between change agents and recipients (e.g., Ford & Ford, 1995; Ford et al., 2008; Qian & Daniels, 2008). Exploring recipients' emotions and sensemaking throughout change and in interaction with various other participants would be useful in understanding how communications among stakeholders affects the success of change.

Positive emotions and positive meanings. The interventions focus on the positive emotions among participants and positive meaning of change. They take several steps to generate positive emotions and meanings that energize

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change recipients to implement organizational change, such as clarifying goals and stimulating hope that the goals can be achieved (Holman et al., 2007). In the Future Search example, the discussion of the prouds and sorries, a staple of the Future Search method, helped accomplish a radical shift toward a more positive tone. Whole-Scale™ Change is designed so that participants come to feel more empowered over time, thus developing greater trust. In fact, something like this is a cornerstone of virtually all of the Large Group Interventions (e.g., Holman et al., 2007). Accomplishing these outcomes is "designed in" to these interventions; combining positive meaning and emotions is intended to boost the positive energy of change recipients, which will lead to successful change implementation. Does this happen as research on positive emotions such as Fredrickson's (2001) predicts? Or are there some complicated emotional sequences?

Comment on the Theoretically Based Questions about Large Group Interventions

As we conclude this section, we recognize that the material we have presented here may seem critical of the Large Group Interventions and how they are practiced. It is not intended to be; the descriptions are not written as theoretical accounts. Rather, we are arguing that the theoretical material we have included opens up a number of questions about the strategic processes accompanying the change efforts and the affective and sensemaking experiences of participants in them. Reflecting on them has the potential to inform the scholarly understanding of the processes we have addressed. It also has the potential to inform the design and implementation of the interventions by making explicit several aspects of their designs and implementations that appear to be tacit.

Discussion

We have suggested some ways in which organizational research and Large Group Intervention practice may be linked much more fully than is usually the case. We have discussed how theorizing might stimulate questions that are helpful for Large Group Intervention practice (e.g., about modularity, collective emotion, and sensemaking), and how the practice may inform theorizing (e.g., by stimulating new scholarly questions such as about impacts of short change bursts). We have accomplished this by discussing two specific interventions and three specific types of theorizing, not simply by issuing a general call for the importance of links between theory and practice.

These issues are important. At the same time, it is evident that accomplishing ongoing interactions in which scholars and practitioners can pose questions for each other and respond to each other in productive ways is not at all easy. There are multiple overlapping dimensions to this issue, including the different communities of practice (Brown & Duguid, 1991) that scholars and practitioners belong to, different languages they speak, different reward systems, and so on (cf., Rynes, Bartunek, & Daft, 2001). Addressing these fully is well beyond

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the scope of this paper. In this discussion, we will simply discuss two intertwined dimensions pertinent to these links. One has to do with ways academics and practitioners might engage with each other with regard to scholarly interests and important practices. The other has to do with the role of the SAP interest group and ODC division in the Academy of Management. These are important organizational contexts for such links.

Academics and Practitioners Engaging with Each Other

To many academics, it would be an obvious next step in the relationship between Large Group Interventions and academics for academics to study the effectiveness of Large Group Interventions. This has rarely been done, and it has not been done comprehensively at all. Such research would almost by definition represent what academics—although not practitioners—would see as engaged scholarship, especially if it is collaborative in some way (Van de Ven, 2007). But Large Group Intervention practitioners have not, by and large, shown interest in having the effectiveness of their interventions assessed by, or even in collaboration with, outside researchers. This is because, in part, it is not at all evident to them how academic research on their interventions would be helpful, and in part because their design methods do not always map neatly onto causal models (Bartunek, 2007). Thus we suggest stepping back from a research focus and instead developing relationships between academics and Large Group Intervention practitioners that might lead to research and practice that both sides experience as beneficial.

Bartunek (2007, p. 1328) recently suggested from an academic perspective some of what would be necessary for such relationships to be productive. This would likely include as attitudes "willingness to learn from those on whom we hope to have an impact, as well as bringing one's whole self to an engagement with others, being genuinely interested in their experience, demonstrating trustworthiness, and seeking feedback from them." Or, to use the model that Axelrod (2010) has developed from skilled practice, what is necessary is that both academics' and practitioners' voices count in their conversations, that both are attending to the big picture that they are about, that there is a sense of urgency in their conversations, and that there is fairness in their exchanges. These suggest a significant reworking of research practice (Balogun, Huff, & Johnson, 2003; P. Johnson, Balogun, & Beech, 2010).

Axelrod (2010, p. 28) suggests that it is important first to "widen the circle of involvement" so that everyone's voice counts. This is more likely to spark creativity and distribute accountability across groups. We have taken a first step toward both practitioner and academic involvement in this paper by inviting practitioners to discuss their interventions and both practitioners and academics to comment on the paper. A second step might be joint academic–practitioner forums (Bartunek, 2007). Perhaps, as Emily Axelrod (personal communication, October 30, 2010) has suggested, a type of Large Group

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Intervention would be appropriate for such a forum. Such an intervention might take place within the ODC division or SAP interest group at an Academy of Management meeting and/or in a more practitioner-oriented setting such as an NTL or OD Network conference. The intervention should be facilitated by skilled practitioners.

Third, it is important to connect individual practitioners and academics with each other. This might be done by helping them build personal relationships with each other, something that has been shown in other contexts to be beneficial (Paolini, Hewstone, Cairns, & Voci, 2004). Such relationships help people learn more about the broader context in which each other works, and also learn who they can contact in the "other" group with questions.

Fourth, it is important to create joint academic–practitioner communities for action, and to have a sense of urgency about them with respect to joint goals. This implies groups of academics and practitioners working together on tasks that they view as consequential, urgent, and capable of having positive impacts. Simply "talking" together will not create any sense of urgency.

Fifth, it is important to make sure that academic–practitioner interactions are fair, that one "side" does not have unjust advantages. We noted above that perceived justice has important impacts on participants' positive emotions. If practitioners feel that academics disrespect them, or if academics feel that practitioners aren't really interested in what they have to say, it will be difficult for them to work together productively. However, if steps are taken so that both sides feel treated equitably, progress in their relationship is very possible.

Even with these conditions, true dialog between academics and practitioners regarding change will not necessarily be easy. There are clear boundaries between the two groups, and avoiding stereotypes about the other group (Davidson & James, 2007) is not always easy to accomplish. Further, the groups are not homogeneous. There are vigorous disagreements within academia about rigorous versus relevant research (Anderson, Herriot, & Hodgkinson, 2001), and junior faculty are more likely to be punished than praised for collaborating with practitioners. Further, some practitioners may find themselves disapproved of by colleagues who do not see particular value in their partnership with academics, or feel threatened by the need to share and unpack both successful and less successful Large Group Interventions. Even with these difficulties, however, the work we have presented here suggests that relationships across the groups have the potential to be productive.

Potential Roles of the Strategy, Activities, and Practice Interest Group and Organization Development and Change Division

Empirically the focus of SAP is on the day-to-day-work, activities, and practices of strategists, with an interest in how this work socially accomplishes a wide range of individual and organizational outcomes. While the development of this field was indeed due in part to the desire to "rehumanize" strategy and focus

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on the work involved in strategizing, there was also a recognition that focusing on the *work* of strategy encourages research into the *practice* of strategizing, what people in organizations were actually doing. Existing research did not (1) explore what strategists in organizations actually did, and (2) the research that did have an interest in what people did (the strategy process research) was at an organization level and thus not getting close enough to what strategists/senior executives were doing. As such, the SAP agenda encouraged an engagement by scholars with not just the detailed activities within processes of strategy development and change (e.g., Ambrosini, Bowman, & Burton-Taylor, 2007; Balogun & Johnson, 2004; Jarzabkowski, 2008) and the activity of strategists other than senior executives (e.g., Rouleau, 2005; Sturdy et al., 2006), but also increasingly common, but relatively ignored, organizational strategic practices, such as strategy workshops (G. Johnson et al., 2011) and meetings (Jarzabkowski & Seidl, 2008), strategy tools (Hodgkinson, Whittington, Johnson, & Schwarz, 2006), and strategy talk and discourse (e.g., Rouleau & Balogun, in press; Samra-Fredericks, 2003).

The SAP field has drawn on the popularity of the practice turn (Whittington, 2006) to help develop a theoretically driven research agenda. The practice turn encourages a focus on individuals, their actions and practices, but also how their actions and practices are embedded in and driven by more widely (institutionally) accepted practices, such as in the field of OD that "participation is a good thing." Jarzabkowski et al. (2007) argue that this approach helps to drive questions that can inform research in the field. So, for example, focusing on practice forces researchers to ask the question of who is the practitioner? A focus on practices encourages researchers to understand the accepted practices managers are drawing on, and also appreciate how they go beyond, for example, the use of strategy workshops, to include things like a taken-for-granted use of PowerPoint presentations to capture strategic thinking and the impact this has (Kaplan, 2010), or, in the case of Large Group Interventions, the less scripted implementation phases that may stretch out over extended periods of time.

There is also some disconnect between scholars and practitioners in the ODC division of the Academy of Management. For example, a designer of one of the Large Group Interventions attended the 2010 meeting of the Academy, and wrote afterwards to one of the authors that the meeting was "eye opening for me. I went to a session where the leadership and ODC folks were talking about beginning to do some work together. I learned that they didn't and as a practitioner I couldn't understand how you did not take both into consideration. Lots of learning for me."

The ODC division might draw from the SAP model by having researchers focus on the daily activities of change agents and recipients of change. This is one way of addressing the concerns we raise up front in this paper-that OD interventions are not interacting with academic research as much as

was the case in the past, and that OD is no longer stimulating new academic scholarship.

Given the wide involvement of consultants and practitioners in the ODC division at places such as the Academy of Management, creating connections between scholars and practitioners may be more easily achievable for OD than the strategy field. As with the SAP field, it is then possible to build an initial agenda. Who are the ODC practitioners, for example? This category almost certainly includes consultants, specialist in-company OD or change management people, and HR people, but also senior executives and middle managers and probably others. So scholars need to be researching all of these practitioners. Second, what do these individuals do? They do things like Large Group Interventions, change workshops, communication, and many other activities that scholars could fruitfully be studying to achieve a greater understanding of more or less successful practices associated with organizational change. Scholars should also be working to understand wider ODC industry practices and assumptions that drive what individuals within the field do, and questioning them when they appear to be self-limiting (see growing debate about appropriateness of the concept of resistance to change; Ford et al., 2008). And scholars should then be connecting findings back to understand how what we find out can inform the broader questions we are asking. Equally, scholars should also be researching activities that practitioners are not consciously intervening in but may in fact be stimulating, such as processes of more emergent change, and using their findings to inform practice. Research agendas should not be driven solely by things the practitioners know. What is important, though, is that both groups need to build on their own strengths rather than dilute them.

Practitioners should also engage researchers in addressing issues about which they have questions but for which there might be applicable scholarly evidence. They should also feel free to challenge researchers if some of researchers' "new" questions, for example about relationships between leadership and change, are not particularly novel.

Conclusion

As we noted at the beginning of this paper, we have not simply conducted a review of literature in the area we are exploring. Rather, we have tried to conduct a review that combines scholarly literature and skilled practice.

There are not many models for conducting this type of review. We have tried to construct one by summarizing scholarly literature, posing questions for practice from it, summarizing skilled practice, and suggesting how the questions posed originally, when combined with descriptions of practice, open up new areas of inquiry that may be pertinent to both practice and scholarship.

We have carried out our review using scholarly literature concerning strategic practices, emotion, and sensemaking, and two exemplars of Large Group

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Interventions. These are important areas of potential overlap. Nevertheless, they represent only three out of a wide range of conceptual perspectives and one out of many areas of skilled practice. Potentially, at least, there are many more theory–practice overlaps in which a method like ours, or one that builds on it, may be used.

In taking this approach, we have not resolved any issues and we have not made clear-cut conceptual contributions. Hopefully, however, we have provided a way to open up connections between theory and practice that are often closed, and, by posing and building on scholarly questions about very important practice, we have shown at least a small space they share.

Further, in the discussion section of our paper we have suggested some means—some possible practices—that may facilitate the implementation of the connections we have presented. While we recognize that the work we have suggested is just a beginning, we hope that use of the ideas we present can re-invigorate links between research and practice in ways that are beneficial to both and to the larger society, and in which both play important roles.

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