Kipp Sorensen

Mike Merrill:
Hello, and welcome to the Mobile Workforce Podcast. I'm your host, Mike Merrill, and today we are sitting down with another episode with our good friend Kip Sorenson. Kip is the director of collaboration and Content management and also soon to be the chief people officer at Journey Team. In today's episode, we're going to talk about change management and the need for technological change and how to impact user adoption positively. So thanks again for round two, Kip. We appreciate having you on again.

Kipp Sorensen:
Yeah, it's going to be fun. This is a good subject.

Mike Merrill:
Yeah, I think so, too. So just at the top here, let's ask you, um, from your perspective, what is change management?

Kipp Sorensen:
Yeah, I always love our, uh, terms that we use. You've been in It spaceroom, remember? Like, uh, itill do you remember that? Oh, yeah. And I've always struggled with these things because I'm like, all right, ITIL is like the way we should do it. Says who? Right? Like some Brits said, this is the best way. Or you look at agile methodology. Right. It's the way I'm going to give you the proper definition, which is the one that just logically makes sense and it probably won't be found in some book somewhere. How's that?

Mike Merrill:
Uh uh, sounds good.

Kipp Sorensen:
So what are we talking about? Change management? We're technology guys. We work for technology companies. There's a big difference between when you guys implement tech versus the tech actually getting adopted and used correctly. Right. The investment of the software is only as good as it actually gets utilized. We can implement SAP Dynamics teams or whatever, but if only 20% of the workforce is using it, well, then we have poor change management. Right. And so if I had to summarize kind of the steps of change management, really what we're talking about here is preparing your organization or your company for some change, right? So there's kind of some pre changes coming. We're preparing you. Right. Craft the vision and the why behind why this is even happening. It kind of goes back to our previous conversation that we had on that other episode, which was get their buy in, treat them like adults and tell them the bigger vision and the purpose around what we're doing so we can get behind it. Because is change easy? No. No one wants change for the sake of change. You give me a good enough reason. I'm all about it. Right. So let's give our employees a proper reason, then we implement the change effectively, in our case, software. And then we need to embed that change into the company's culture and practices and processes. So we continue with proper adoption. And then, of course, any good change management strategy should be reviewing that and then analyzing, saying, hey, was it effective? Right. Are we succeeding at, uh, implementing that system?

Mike Merrill:
Yeah. That's great advice. So tell me this. I'm sure you've seen this many times. I know I see it all the time. Companies will say, well, we're out in the market, we're looking for a new solution, because the last one we bought, nobody really used properly, we never got it off the ground. And so they think that buying a different system is going to fix their problem. And what do you say to them? What do you think?

Kipp Sorensen:

Uh, dude, here's the deal. I've been doing SharePoint implementations for the last 20 years. I've seen companies you mentioned the word SharePoint and you think that you just swore, you know what I mean? Like, that's a bad word. We don't say that word here. People lose their minds if you mention that piece of software. And then you go over to another system, they're like, oh, SharePoint is the best thing that ever happened to us. Right. It's like, what's the difference? M proper adoption, right? Now, don't get me wrong, could we deploy the system wrong? Right. And it affects our adoption, of course. Right. And so it needs to go in line with how we deploy things. But man, I mean, how we consume and utilize the system and how that marriage to our companies is what success is, not necessarily just the software all by itself.

Mike Merrill:

Yeah, that's a great point. And there are times now, this is the other thing. If we don't do proper research and investigating solutions and we buy something because it's shiny or because we like the salesperson did a great job and we joked before this recording, and I said, uh, you know, you hear? The term out there, or we joke about it with some softwares out there. We say, well, their software was meant to be sold, not implemented. Right. That, uh, dust ware or shelfware or you hear different terms thrown around for systems that never get off the ground once you properly analyze it. This really meets our needs. What's the number one thing that you recommend companies do in order to make sure that adoption actually gets off the ground and goes up into orbit?

Kipp Sorensen:

Yeah, I actually think it's the workforce that utilizes the software they need to get on board. So I'll give you some insights in regards to what we typically do is probably different. I'm sure it's different for different technology. How we roll out change management adoption on a CRM solution is going to be different than, uh, a solution that only affects finance and accounting versus the entire.org okay, but I'll use what's familiar to me. Let's say we're rolling out an.org wide solution, uh, that affects every employee. And how that software gets used is slightly different based upon the different departments that you work

in. Right. So if we look at like, a CRM solution, how cells interacts with that solution is from a different persona than that of marketing or that of, uh, maybe professional services or accounting and et cetera. Okay, fair enough. One of the most effective ways now let me pause for saying, can we roll everybody into the implementation of the software and bring the whole company? No, it's not going to work that way. Right. There's a lot of noise. That's huge cost, et cetera. So what do you do? You implement a champion program. You have subject matter experts. Anyone that's been in it as long as I have been in it. We know the right employee that, uh, I'm about to talk about it's the employee in the department that's technically sound. They latch on the software really, really well and they understand their business or their department's needs really well. They become your champion for that software implementation. You identify who your champions are and you bring them in really early into the project. Right? Like, literally, we're kicking off this project. You've identified as the champion. We want to get you into the initial meetings about what we're trying to address, the needs that we need to address, and then you're testing that. Is that true? Is there gaps and things that we should be aware of within the sales department that we may have overlooked? By implementing this said, uh, system? They now become your department's representation. And then what happens is we bring them along with us through the project implementation. And now what happens when their department gets up? We have an evangelist in that department that's like, no, this offer is going to be so great, guys. Man, this is going to save us time here, here, and here. I understand the backstory. I was involved in the project I represented, I bought in. My reputation is even on the line a little bit in regards to us using it. And I can marry our department needs to the software. And now they're guiding the rest of their department on how to best use that tool. And they almost become like this light tier one support as well. Right. Because when sales rep I'm confused, the quote stuck or whatever. It's like, oh, uh, I'm going to talk to contact Jake. Right? Because Jake, he was the subject. He's a champion for the CRM solution, and he understands this, like, in and out and he bam, bam, addresses everything. Right. And we saved that support to the It help desk that doesn't even understand the sales process and can't really help them anyway.

Mike Merrill:
Well, yeah. What you're talking about is the actual user level issues that users are going to encounter that may or may not be in the manual, may or may not be common to another organization, but in their application of that solution, it's a real world challenge that probably ten of the other people are going to hit if they don't address it. Now.

Kipp Sorensen:
Yeah. And it's usually and it's usually like a lack of knowledge, right. Not the system has a bug or anything. I'm not sure how to do this.

Mike Merrill:
It's a people problem, not a software problem. Right?

Kipp Sorensen:
Yeah, totally. Yeah.

Mike Merrill:
That's great. When it's time to do that. I mean, I love how you laid out involving them early. And I would submit potentially, depending on the software, depending on your dynamic and your culture, maybe even introducing certain key people in the sales cycle, maybe even pre purchase, so that you say, hey, we've narrowed it down to these three that fit within our budget. And we feel good about, but we really need to help you understand and you to help us understand which of these three is going to meet your needs the best. And then have a scorecard, have a process mapped out again. So even earlier they helped decide they bought this because I needed them to get it. Because I need those three things. So now I have to make those successful. Right?

Kipp Sorensen:
Totally. Yes, I totally agree. Um, I'm all about just disrupting our flow of conversation here, Mike. Okay. I just thought of like the perfect analogy. You know what change management is? It's the difference between the people that buy the book and then their life doesn't change. So they buy another book. Okay, still struggling. I'm going to buy another book. When

all they needed to do is actually implement what they learned in the first book that changed manual.

Mike Merrill:
Yeah, that's great.

Kipp Sorensen:
What do you think? That's good, right?

Mike Merrill:
Well, it's the same thing I think about with podcasts. It's like if you're not just listening to three more podcasts on the same topic from different perspectives, are uh, going to mean anything to you if you don't do it, might confuse you, might actually be worse. You should just listen to the one again and take a note. Right. And then have an action plan.

Kipp Sorensen:
Yes. Tell me.

Mike Merrill:
Well, the key is change. Right? You said change management. Well if you're not making any changes, then what are you doing?

Kipp Sorensen:
You're not managing nothing.

Mike Merrill:
Alright, so that's great. So I love that. So we're communicating with the team. Here's the plan. Here's. Why I'll even submit? We had, uh, one customer. In fact, I recorded a podcast with them earlier today. They've been a customer for about twelve years. They um, adopted fingerprint technology on like horizon. Netbooks. This is like Palm Pilot era. Pre BlackBerry, pre iPhone, pre Android. Those didn't exist. They were getting fingerprint clock in and out by their field workers drywall in the state of Texas. And they were an early adopter, they were an innovator. And I remember when that company decided to purchase our system and to partner with us, the It director that

was making the purchase and he shared this with us. It was like uh, 13 slide, uh, PowerPoint that he was presenting back to the management team and to the owner that assigned him with the task to go and find a solution to fix their problem. So he shared that with us and it was amazing because it was almost like he was reselling what he was buying back to the owner, and the last slide said, why are we doing this? And it says because Mr. So and So, the CEO of our company tasked me with the assignment to go find a solution that will help us address this problem. And this is that solution. And it was like, wow, these guys have it together, and they're still innovating. They're on the leading edge of technology adoption for construction and for other I mean, even I would say, ahead of other industries in how much they really buy into this stuff. So I think there's correlation there.

Kipp Sorensen:

Totally, for sure. Another fun correlation, if you don't mind me, uh, sharing, there's a lot that we bring to the table with some of our clients, and they're like, well, what's the ideal state? And I usually say it depends. If one company's like, hey, Kip, we're using file servers today, right? So, like, uh, us just getting files up into some cloud storage is like, going to rock people's world, right, versus another company. It's like, hey, we've been digital for a while. We're going down the path of records management, sensitivity, labels and governance and all this other stuff. Well, they can do that, right? So you got to understand where your user base is. And kind of back to your point earlier about, like, construction companies, right? You kind of have to know your user base and meet them where they're at and change management success may look different based upon your culture. I remember one of the first software implementations I did way back when, it was actually in Phoenix as well. This was before tablets. And do you remember the Comp? Uh, it was compact, had a touch screen laptop. Do you remember those?

Mike Merrill:

Oh, yeah, absolutely. We had customers.

Kipp Sorensen:

They didn't even call them tablets because they weren't tablets at that point. It's just like a laptop. It was a weird laptop.

Mike Merrill:

I think they call them networks, maybe netbooks or something.

Kipp Sorensen:

Yeah, I think so. I think so. And I remember I was working for a large construction company, and we implemented these in their trucks as like, oh, we're going to revolutionize you guys, right? We're going to bring you into the 21st century and have all this amazing stuff, or whatever. And I remember I was teaching these, um, field reps, and, um, at one point, I said, now click on the X on the top, right? Or whatever. And these weren't touchscreens. You had to use a stylus, right? Remember? And a bunch of guys were like, it's not working, it's not working. I look at the table, and they're all hitting the screen with their finger, right? Yeah. Uh, and I'm like, okay, you know what? My training is not set up for you. I'm assuming all of this preliminary knowledge of something. And then I remember in that training, I paused and I was like, really quick, who all has a computer at home? No hands went up. Right. And I'm like, okay, we're dealing with way different than I expected, and change management for them look differently. Right. Because I understood the persona of that workforce better, of course, a little after the fact, but we pivoted and adjusted accordingly.

Mike Merrill:

Yeah, that's well, and I love that you found that out by asking a good question, because some people could get upset and tell them again, but louder, no, not that. And rebuke them where, again, your question figured out. Oh, they don't know anything about computers, essentially, or they definitely don't interact with them every day. Um, uh, and this kind of goes into something

else I really wanted to talk about. Um, we think of marketing as a sales tool to drive new business, to bring in revenue, to gain new customers. What's your stance on internal marketing within the company, where you're selling the adoption of a solution, you're selling the value for their role as opposed to just the company, we're going to make more money. We're going to save more money. We're going to be more profitable so that I can sit my ivory tower and build it taller and look down upon you. All right. As opposed to sharing the value that it means to their position. I mean, how important is that? Have you seen it work that way? And maybe when it should have been implemented if it wasn't?

Kipp Sorensen:
Yeah, dude, such a great question. So, uh, have you read the book, story brand? Have you heard of it?

Mike Merrill:
I have not, but I'm going to make a note of it.

Kipp Sorensen:
Good book, especially from a marketing perspective. And in story brand, I'm going to paraphrase and price slaughter it for those that have read it. But I'll attempt. So the premise is, when we market, we don't market ourselves as the superhero, okay? We market that our ability to allow our client to be the superhero. Who wants to hire the superhero? Who doesn't want to be the superhero? Like, we all want to be the superhero, right? Like I want to be Luke Skywalker. Obiwan Kenobi. Right. And so we need to approach marketing. First of all, outside of your question, I'll get to your question, but let's celebrate the right people. So I'll give you a perfect example because it's on my mind. Every single morning I go to the gym. So I go to the gym, and they have these TVs up, right? And they're like, employee of the month. And I'm like, who the heck is that? I didn't know who that is. The employee. I come to the gym to celebrate the employee. Really? Now you flip that sign and you go, gym member of the month. Dropped £40, killing it. Now, do you think I'm valued a little bit more by that gym?

Mike Merrill:
Interesting.

Kipp Sorensen:
If I see that they're celebrating me and the other gym members as the heroes, and they're there supporting us in our hero's journey, big difference. Right. So what's aligned that to your question, Mike? We're inputting the company Internet. It's going to save the company so much money, blah, blah, blah. What does that have to do with me?

Mike Merrill:
Right. With them.

Kipp Sorensen:
Right. But if I switch that and that internal marketing is like, hey, we're going to implement the system. And by doing so, Mike, I'm going to free up, uh, all this noise and wasted time that you have to deal with on a regular basis. So your best talents that your godgiven doubts that you have can be brought to bear on this solid work. And we're going to eliminate the noise and allow you to shine as an employee. It's like, thank you. Get the noise out of my way. Let me be great. And we're here to support you in being great, not make us great. And you should hop on the train of making others great. Right. Like, let's actually focus on the workforce, how they're going to benefit, and how do we have them, uh, be the superhero. And what we're implementing is to allow them to do that.

Mike Merrill:
Yeah, I love that. Uh, in fact, we have one of our first I think it was our 6th podcast we did, um, that was the topic was talking about being the superhero of the job site. Uh, and it's interesting that you bring that. In fact, that the gentleman that I had on as the interview, um, we brought on just a couple of months ago as our new CRO. So now he's a part of our team and he's helping, uh, to share some of that perspective with the way that we're marketing externally as well. So it's, uh, an interesting flip of things from what we would traditionally see or hear in the past. Right.

Kipp Sorensen:
Yeah. And there's so much here. Uh, I don't know, we could go all kinds of different things. Sorry.

Mike Merrill:
Well, no, you're good. That's what we wanted to have is a nice, thoughtful conversation. We're talking about marketing internally to your people and marketing for them. We're selling efficiency. Uh, we're going to take your burdens. We're not going to add something to your plate that you now have to adopt. And it's going to be a pain in your butt. We're going to actually get something for you that we're investing in to take three things off of your plate and make your life easier. And so that's just such a different message. And as m an employee of a company, I'm going to feel a lot better about that new assignment to learn this new system if I feel like it really is going to benefit me in the end. And I think we're in perfect alignment, uh, with our approach to that message. So have you found instances where companies didn't deal with that messaging properly and it backfired on them and they had to pick up the pieces and try and do something different?

Kipp Sorensen:
Yeah, totally. I mean full transparency as consultants. Um, our natural behavior as consultants is to solution. It's a common phrase where we're at that we're like, stop. Solutioning.

Mike Merrill:
The same in marriage, right. Your wife?

Kipp Sorensen:
Yes.

Mike Merrill:
I just want you to listen.

Kipp Sorensen:
It's a no. We want a solution. And let's be honest, what do we solution with? With what we know. Right. So it's like, I got a problem. Oh, let me grab the technology that I'm an expert in and find a solution constantly. Uh,

humans, we're humans. We're not cogs in a process, in a wheel. If we don't see the value, if employees don't see the value of what they're doing, if they don't see the bigger picture of what they're doing, then you're going to get tissue reject. I use this analogy. Um, we talked about this actually a little bit earlier, but there are levels of commitment. There's a big difference, Mike. If I do something out of compliance, right? So let's say you're my boss and you say, hey, you got to use this system even though you hate it. I don't give a crap. Be disciplined. Use X system and have discipline and do it. So, um, I'm like, fine, you know what? You're not listening to me. I'll be compliant. What happens the first time I reach a roadblock? I knew it. Systems a piece of crap, I'm out. And then I'm going to collude. I'm going to go around the office and complain, oh yeah, don't you think this system boosts the crap? And everyone's like, oh yeah, I totally agree. And I get justified, right, in regards to my ability to fight against this thing that I was never bought into in the first place. Right. But if we treat employees like adults and not children and actually allow them to see the bigger picture of what we're trying to accomplish, they can get behind that and they can go, hey, you know what? The system sucks. But you know what? I understand what we're trying to do. Maybe we need to get some reps into this thing. So I'm going to step up my game. I'm going to test more. I'm m going to give some good feedback because we need to address the desired outcome, the bigger picture, the strategic focus, not just use the system.

Mike Merrill:
Yeah, it's more the why. Not just a why. And employees need to understand the why if they're going to adopt the company's vision of getting better. Right.

Kipp Sorensen:
Especially if you don't want to move past a command and control culture, you're going to have to do it. Right? I saw this from Ryan Mickler, right? He used this analogy of like kids cleaning your room, right? It's like, why do you want your kids to clean your room? Do you want them to clean the room so it's clean just for the next 4 hours? Or do you want them to clean the room because you want them to appreciate the room to take care of their things. Okay, well, the change management strategy around that is different than the

change management strategy of just get your room clean or you're grounded.

Mike Merrill:
Yeah, that's when you throw the stuff under the bed, right?

Kipp Sorensen:
Exactly. And then what you have to do tomorrow, command control, full disclosure.

Mike Merrill:
So, I mean, my brothers, I learned it probably from them, too. I definitely taught it to the younger ones. But literally, when my dad would say, your room better be cleaned before I get home, I kid you not. As soon as we heard the garage door open, run, and it was tossed everything as fast as you can, and almost never before that moment before he was actually in the driveway did anything happen, because it was exactly what you're saying. He wanted to come in and see that we had done what we were told and, uh, that we were obedient way more than he really cared if our room was cleaner. I think as an adult now, looking back, that was how he was trained, that's how he trained me. I had to break that cycle and say, oh, no, we're not doing it because of that. Right?

Kipp Sorensen:
Yeah, totally. There you go. We're dressing parenting, Margaret, on this, uh, podcast. Technology, change management and parenting.

Mike Merrill:
Well, it all applies, right? They say, uh, I love this phrase, uh, how you do one thing is how you do everything. And I personally think of that every day because I'm trying to be better. There's things that I don't do as well as I'd like or that I intentionally don't do them well. I don't put enough value on it. And then I think if I don't, I say this one all the time, too. If I'm not going to care about this in five years, I'm not going to spend five minutes on it. That's it. If it doesn't matter in five years, I'm not going to spend five minutes. And so at least to prioritize. So, um, I think we're really onto something

with again, how are we going to better manage our employees? Not only their behavior and their expectations, but their contentment, their fulfillment, their happiness, right? Happy employees help build a happy company, right? Content employees help build a great company. That's how you're going to get a great company. You got to have great culture. You're going to get great culture by helping your employees be great and knowing what great looks like to you and feels like to them.

Kipp Sorensen:
And I know someone's listening going, yeah, but Mike and Kit, you don't understand my workforce, right? You don't understand these people, right? Like, these guys are like children. I got to treat them like children or whatever, right? That might be true. However, then I would maybe even suggest that you have the wrong employee. Do you want an organization by which you have to micromanage and have a command and control culture to force everyone to do their jobs despite the fact they're adults? Or is it better to have an organization where people are self directed and empowered to do their jobs well and you support them?

Mike Merrill:
Very thoughtful question, and, uh, I think great advice for us, uh, personally, right? Aside from our organizations and our teams.

Kipp Sorensen:
And by the way, Michael, I think it goes against human nature. I do it right now all the time. We do this at Journey Team all the time. We have a problem, right? I don't know. I'll make something up. I'm nervous about making something up. So some of them think it's, like, real. Okay, so let's say we have a dress code policy, okay? So command and control is what? Well, we need to implement a dress code policy, right? We're going to write up some document. We're going to spend countless man hours fine tuning this beautiful document that's just going to just lay the groundwork and transform our culture in such a positive way. And then we're going to enforce it on our people. They're going to be bought in, and we're never going to have a problem again with someone not following the dress

policy. Really? Or you could. And here's the deal. That's the natural behavior. Like, that's my natural behavior. Oh, we got a problem. Let's process the crap out of it. Let's implement policy restrictions. Restrictions, restriction. Or you just go talk to that employee and say, hey, can you make sure that you're dressed professionally when we're meeting with clients? Okay, awesome. Which one makes the employee feel better, too? Oh, I work in this environment. I have all these policies I have to follow. If I don't follow someone's breathing down my throat, right. And I have so much red tape, I can't even get my job done because, uh, some executives in another conference room is command and controlling us and treating us like children. Man, that's exhausting. Yeah.

Mike Merrill:
Ah, that's a great analogy. And that's something that can apply to all of us. Right. It's a pretty neutral thing that I think we all have to address. And I think, uh um, my wife, she's a manager at an oral surgeon's office. And, um, when she started this job, just maybe a year and a half ago, she likes to dress professor. She likes to dress up to go to work. She was getting outfits and things for work that aren't dental specific. But it's like she looked like a professional businesswoman going into this office every day. And over the course of time, the employees started migrating that direction, and pretty soon, everybody is more aware, and pretty soon, her boss is saying the oral surgeon is like, man, I really like how professional. You're so professional. And it was like he just thought professional, classy, all these things would come to mind when she would walk in to work every day. Well, that affected the way that she's treated, and that affects. The level of respect that people have for her and even patients. Uh, when you dress for success, you're commanding respect that it's unspoken, but you're going to get that back without having to say anything. So I think it's a great analogy in the way we show up. Right?

Kipp Sorensen:
Yeah, totally.

Mike Merrill:
Well, uh, another fun conversation. I've really enjoyed it. Again. Kip M, tell me this, uh, or share with the listeners what is just in closing, I mean, two things. First, um, what would you have them take away from this conversation, particularly?

Kipp Sorensen:
I think it goes back to the pitfall that we brought up earlier where we think, like, oh, that software wasn't the right software, and we're going to go look at the grass on the other side of the fence and think, oh, well, it's just green over here. But little did we realize that there is some intentionality to make that grass green. Right. So just the intentionality around. How do you plan to allow your employees to get involved on the implementation of the software and focus on the benefit to them? And I would argue if it's not beneficial to them, maybe you shouldn't be implementing it. Right. I would really challenge that. Make sure it's valuable to your team. Be intentional about a change management strategy. Make sure that they're bought into it. And if you do that, they're going to use this solution if it's beneficial and you communicate it appropriately.

Mike Merrill:
Love that, uh, great advice and very well stated. Um, last thing, uh, what's something that you are most grateful for in your personal life that helps make Kev Sorenson who he is today?

Kipp Sorensen:
Probably opportunities. I've gotten really present to the fact that, um, opportunities don't exist. Like, they don't exist outside of relationships, period. And we even do that as a consultant sometimes will say the client was happy. No, Bill, that human is happy. Or the client signed a project with us. No, Trish signed the contract with us. Right. Like, we have a tendency to lose our humanity in some of our interactions with in the professional world. We do this to our workforce. No, like, is it benefiting Mike and Kip on those teams? Right. Like, they're humans. They're trying to get their jobs done. I failed in the past to really I've been selfish with my idea that opportunities present themselves because of me. When reality know every opportunity I've ever gotten, it was because someone believed in me or I had a relationship with someone and sometimes they saw something that I didn't see. Um,

or maybe they did see something through my hard work, but nonetheless, that opportunity existed because of another human. And so, um, something that I'm just really present for of late is just grateful for the relationships that I have and for all the people in my life that kind of, at one point, believed in me well enough to create opportunity for me. Whether it's in my current employer with Ryan, even, uh, you right. This isn't possible for me beyond here unless you created it, and so I need to be more grateful for those relationships.

Mike Merrill:
Well, I'm grateful for your friendship and the relationship that we have, uh, even if it's been digital, uh, so far. Uh, we'll find an opportunity to get out together on a run or do something fun, uh, here coming up. But thanks for sharing your wisdom and being so gracious with your time. I know that our listeners will deeply appreciate you're going to impact lives through this and their, uh, lives that you probably weren't going to reach otherwise. So very much appreciated.

Kipp Sorensen:
Yeah. Thank you.

Mike Merrill:
All right, brother. We'll catch up with you later.