

Ep #369: John Way - The Monkey Wrench



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## Ep #369: John Way - The Monkey Wrench

Welcome to the Dentist Freedom Blueprint, a podcast about freedom—freedom from expectations of society and the traditional path to success that has been ingrained in us from our early years, I'm joined by mavericks, renegades, and non-conformers to discuss an anti-traditional path to financial freedom, freedom of time, relationships, health, and ultimately freedom of purpose. My name is Dr. David Phelps. Let's get started.

David Phelps: Welcome everybody, this is Dr. David Phelps of the Freedom Founders Mastermind Community and Dennis Freedom Blueprint Podcast. Today, very privileged to have a conversation with a gentleman that I met through another friend. In fact, it's kind of the world we live in today. Those of you who know me, I'm a big person on connections and relationship capital. And I always look for opportunities to just find out about other people wherever I am. And just happen to be that Mr. John Way, who is my guest today. John, hi, thank you for being here.

John Way: Thank you so much for being on this podcast.

David Phelps: John and I happened to be sitting at a table at dinner, just a little over a month ago, and I'm always curious about people and what kind of businesses they're in and their experiences. Because I always learn something, if I'm inquisitive enough, I'll learn something. And we had enough of a conversation that made me say, "John, I'd like to get you on a podcast because you bring something to the table that every business owner wants to figure out." So John is the founder and chief productivity officer of pipelineapp.io. His passion is for helping people and organizations work smarter and grow faster. He has over 20 years of experience building, managing, and refining

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enterprise systems and processes, both for Fortune 100 clients and small businesses.

Through his work, he's seen every mistake under the sun and how they drain organizational resources. Growing and scaling an organization or business successfully is challenging and doesn't happen by accident. Many leaders are overwhelmed and they don't believe things can improve. And John, I'll say, that's a place that I spent a lot of years of my life when I was actually a dental practice owner. So definitely small business. I had a lot of technical training skills, so I could do my craft, but doing that craft requires a whole lot of other business machinations that school doesn't teach us. So we get out in the world and we think, well, I'm a business owner now and let me go build this thing and drive revenue and serve customers and clients and do a great job. And, oh my gosh, I feel like I'm spinning plates.

You know exactly what I'm talking about because that's who you help people with. And you also have experienced that in your own life and seeing, to the point we were talking about earlier, about the monkey wrench, the chaos monkey and how it's so important to have redundancies in businesses. So let me let you just pick up with a little bit of your background, flesh that out for us a little bit, talk about maybe pipelineapp.io and then how that's integrated into what you do with Innovative Way, Inc, today.

John Way: Yeah, sure, no worries. So pipelineapp.io, this is the product that we have at my company, which is Innovative Way, Inc. This is our product, this is our cloud-based form product, and what pipeline is is a workflow management system that helps you make sure that the business

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processes that you have in your business are actually being followed. Because let's be honest, one of the biggest, worst things as a business owner, is when you find out that the things that you thought were being done, aren't getting done at all. It makes you question everything. And that's one of the biggest reasons why I built pipeline is so that you, as a business owner, don't have to worry about that. And why I created pipeline is because I wanted transparency and accountability in all of the processes that I have with the people that I work with, employees, vendors, suppliers, all that kind of stuff. And I want everybody to be on the same page all times. And our biggest mantra that we have here in Innovative Way is that we want to get things done right the first time.

Not the third time, not the fifth time. It's because I hate rework, so that's why we created the product that we do. And that's one of the things that I challenge a lot of business owners, small business owners, entrepreneurs, stuff like that is, a lot of times as we're growing our businesses and so on, we're very caught up in the idea of, hey, let's get things done. But if you think about, how do I get things done the first time around? It really challenges how you think about work and how things get done. Because if you're building things to where it's like, oh, I only worry about getting things done. Doesn't matter how many tries it takes. It could take someone a long time to learn your business because you may have to put in all these safety guards and all that stuff to carry somebody through. And so that's why we really challenge people to think about how do you get things done right the first time around? So that's a big mantra that we believe in here.

David Phelps: So is your processes and using pipeline.io, does that also help with integrating or onboarding new hires, perhaps?

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Does it assist with that or ... It sounds like it would, to me. I mean, it just makes sense that it would, but how does that work in that capacity?

John Way: Yeah. So as an example, so one of the big things that we ask people to really think about is, you have to have absolute clarity when you think about assigning tasks or process or something like that. Absolute clarity on who is doing what, by when, and how. So those four components, you absolutely have to have because a lot of times ... Let's say hypothetically I was asking somebody, "Give me a report on year to year sales," and then there's no clarity on when that's supposed to be done. Where am I supposed to be pulling that data from? What data am I supposed to be looking at? And a lot of times, you're going to have mismatched expectations.

And so, when you have clarity on who is doing what, by when, and how, if you have a brand new person joining your team, your brand new new-hire, if you have those four components they can actually hit the ground running really quickly without somebody having to go through and say, "Oh no, no, no, no. We use this template over here. Oh, you need this tool over here. Oh, we only care about these KPIs over here." So if you have all of that stuff written down, to guide a new hire through their day to day task, they don't have to have all these questions that they constantly stop to have to ask somebody. So yeah, absolutely would help a brand new hire onboard into a team.

David Phelps: So as a business owner, this sounds like would solve a lot of my problems. But now, also I'm thinking, what's the friction for getting this done? How much am I, the business owner, going to have to be involved in? Do I

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need to have a team already and a culture, John, that meets certain metrics? I guess the question back to you would be, how do vet clients that are ready and right and will definitely benefit from what you help them do? Maybe go from that standpoint.

John Way: Yeah. So I can tell you, so this is a true story that actually happened to me, which actually helped me catapult this particular idea. So it actually came about because I had an employee, a key man employee, leave my business, resign, quit with two to three weeks to go on the project that he was leading. So imagine that. Imagine the mad scramble, everybody burning the midnight oil to figure out what it is that he was involved with, how to get it across the goal line. And this just didn't happen to me once, this happened to me twice. Twice, this happened to me. And so it was a huge disruption, and because of that, that's one of the reasons why I was like, okay, this will never happen again. And so, I want to make sure that my business can withstand somebody, a key particular person, especially in today's time. People are hopping, leaving for jobs, all that kind of stuff, all the time.

And so, how do I sustain my business without having to worry that that particular person's going to leave? So that's how I started. And when you have a business where you're ... If you're a business owner and you're worried about that, you're worried about, I have this one key person and I'm worried that they're going to leave or something like that. That is probably the time to start really thinking about how to establish something like this in place. Because A) you're probably going to potentially replace that person. And B) you're going to have to onboard somebody into that position really, really quickly. There is no transition period. And that's one of the things

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that you said in the intro here, these things don't happen by accident. You're going to have to put proactive thought into this. And so, when you have that lead time, you have that person here take that time to get that knowledge, and therefore you systematize that and put that into a business model.

David Phelps: John, I assume that, through your company Innovative Way, that you provide a consultative approach to integrating pipeline into a company. That what would help. So is it a consulting agreement? I assume it's a subscription to pipeline ongoing, but again, how do you interface with me, the business owner, and my company? What are the first steps if I want to learn more, I guess is really what I'm going. Because I am very personally interested in what you do and this will help other people who are listening to see, well, is this a fit for my company or not?

John Way: Yeah. So you generally have a consultative, discovery, initial phase that we go through. Where we start mapping out some key processes and so on. Now, we have a lot of industry standard processes that every business has to follow, so stuff like sales, marketing, operations, that type of stuff. Events or whatever kind of stuff. We know what the industry best practices are so we can see, okay, do you fit those industry best practices? Or are you doing something very unique to your business? And if it's very unique, then we do a deeper dive to see how you particularly do it. If you follow an industry best practice, then we have the skeletons and we map in, okay, so we know what the general steps are. So who on your team is responsible for all of those things? And what systems do you integrate with in order to make that happen?

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So I'll give you a super simple example that I experienced because of what happened to me. So the reason why I started pipeline was because people left. My key men left with two weeks ago. So most companies have some type of off-boarding, for a lack of a better word. An off-boarding process. And it's usually two weeks, because employees give their two week notice. So we take a look at that and it's like, okay, so in your two week off-boarding process, what do you do? And I can tell you that a lot of business owners were like, "Well, I don't really have a plan for that. I don't really have anything thought through." And I was like, okay, well, even if you're going to do it yourself, without talking to me or using a system, this is what you need to do.

You need to have very, very quickly, you need to know what is it that they do every single day, everyday tasks that you need to do. What are the weekly tasks? What are the monthly tasks? And what are the quarterly tasks? Those four things you have to know immediately, within the two weeks. And you can probably get all of that down within a couple of hours, talking it through with that person. Number two, you need to figure out who that replacement is going to be. Clearly somebody's got to do that work. And then number three, you have to have that person, whoever it is going to pick up that work, shadow the person while they are here to do all of those tasks. That way, when the person is here, they can say, "Oh no, no, don't use this system. Use this one. Don't use this template, use that one."

Because I had some, again, somebody leave ... We recently had an operations manager leave, in my company, to leave for another opportunity. Great opportunity for her. But I shadowed, so I was picking up



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her responsibility, so I shadowed her and I was like, "Okay, what is it that you do? I'm going to do it and you're going to tell me where it is I did wrong." So after she left, in two weeks, I was able to do everything with 80, 90% efficiency of what she was doing it. And imagine having that structured process there, it really gave me the comfort to know that, hey, I was able to pick up all the balls, spin all the plates that she was spinning, and know that it's going to get done right. So that's an example of a process that a lot of companies and business owners should think about and put into place.

David Phelps: And because, if somebody does leave, as you said, typically two week notice and then they're gone. If you have this already set up in advance, probably unless you are really proactive about having a bench of candidates that you could draw from, in today and this world we have today, that's probably not even present today. Because there's been so many shifts in the world of labor with COVID. But having this in place with a good team, you know what the functions of this person have been. And it'd be relatively easy to check the boxes to make sure things, projects, items, whether it's daily, weekly, quarterly, aren't being dropped. So in the interim, before you on the person who will ultimately take over that position again.

John Way: Exactly. And because you have it structured down, daily tasks, weekly tasks, monthly tasks, quarterly tasks, then when the new hire comes on, you know the exact training procedure that you need to bring that person up to speed. Because you have it already broken down; daily, weekly, monthly, quarterly. And so therefore, when they need to be brought up to speed, if they were able to transition ... The person that was leaving able to transition it to you

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within two weeks, you should be able to transition to the new hire within two weeks. Not take six months. Some of these companies, when they transition onboard a new person, they're onboarding for months. People tell me, true story, I had a client tell me, "John, I am really in a bind right now because my business is growing, all this kind of stuff, but I can't hire."

I was like, "Why can't you hire?" He said, "It takes somebody two years to understand my business." I'm like, two years? I mean, you're going to have to hire for your bench two years before you have a surge. That's crazy. And I was like, you can't have an onboarding that takes that long. And a lot of businesses, I mean, they may not take two years, but it takes months. Three months, usually. Six months is average. I'm like, you need to be able to figure out if that person's going to work for you in two weeks, because I don't know about you, there are a lot of business owners who use recruiters to bring on people. And recruiters, guess what, they would say, "I'm willing to replace a candidate if they don't work out within two weeks, usually."

And so you have to know, can that person fit and do the job in two weeks? And so how are you going to be able to do all of that in two weeks and get that notification? And so that's why I'm like, having a very structured off-boarding leads into a very structured onboarding, so you can make a quick decision as to whether or not that person it fits in your firm, where, can they do the job? And if they can't, if you're a hiring recruiter, then you still have that window to replace that person and make that decision quickly. And you're not suffering through somebody who's not a good fit.

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David Phelps: So John, what do some of your clients that have been with you, business owners who have been with you for any period of time, whether they're in their first year or maybe they've been a client for multiple years. What's been the change in their feeling? Not just numbers and hardcore metrics, but I mean, what kind of sense of relief or peace of mind ... I'm just throwing words out there, but what do you hear? What's the story they give you back about having this in place?

John Way: One of the biggest things, and I know personally, myself as well, one of the biggest things that they have the feeling of, I can delegate without having to worry. That is their biggest feeling. I know I've had that issue before, where I feel like ... Again, it's a self-perpetuating cycle because it's like, oh, I don't know if I trust this person so I'm not willing to delegate. And when I'm not willing to delegate, I'm either A) micromanaging ... Either I'm micromanaging or I'm taking on their task, which means that I'm eating up my time doing their job. And then eventually that person's going to feel micromanaged or they're going to feel like you're a bad boss and they're going to leave. And then now this cycle just perpetuates. I've had that.

And so when you have really good clarity, unlike what they're supposed to do, how they're supposed to do it, you have transparency and accountability in your processes to where you can see that. Then when you delegate, it's like, I need this stuff to get done. This report, sales report, year over year, you know it's going to be done right. There is no mismatched expectations. And that's the freedom that you have, it's like, oh, I can actually, quote/unquote, "I can truly hand this off to my second Lieutenant," or this person or that person and it's

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going to get done right. I mean, that is a very freeing feeling. I can tell you, a very freeing feeling.

David Phelps: Listen, I totally get it. How many times do we, as CEOs and owners, feel like we're carrying the weight of everybody? Even though we have staff, employees, and processes and systems in place, we think they're all good. But, to your point, if we really feel like we cannot delegate and feel confirmed that what we've delegated is going to get done, we still carry that load. And it keeps us from being able to be creative and visionaries we're supposed to be. It bogs us down in that process.

John Way: Exactly. And one of the things that I appreciate about your podcast, where you talked about, The Freedom Podcast, you need to have freedom with your time. Who wants to work 100 hours? Work on the weekends? As we talked before, one of the biggest things that I want owners to be able to do, remember I was on a cruise and they were trying to call me. I have all these owners that tell me, "I have workcations." They have to take their phone, they have to take their laptop. I mean, my biggest thing is, you want to be able to have a vacation without your phone going off, without you having to check email, without you having to do all that. So how do you get there? That's the key, how do you get there? And part of it is, I can tell you, part of it is also this ink blot test for owners as well. Because the big question, when we talk about being able to delegate without worry, is that insightful question that you ask yourself ... what do I need to see so that I don't have to worry about this anymore?

What do I need to see? And I know a lot of owners, they've never themselves that question before. Let's say I'm putting an event together, or let's say that I'm doing

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some event for my customers or something like that. And I want to be able to trust my second lieutenant to be able to pull that off. What do I need to see that this is, A) progressing, and that this is going to get done right? And a lot of owners don't have that clarity. And when they don't have that clarity in your head, that means that you're going to be micromanaging. And so when you ask yourself that upfront, and get that clarified, then A) you can delegate without having to worry. And B) that person who's doing it knows that, oh, I know exactly how to meet John's expectations. Or I know exactly how to meet David's expectations. Because every everybody's clear and knows what the expected end result is. That's super, super helpful.

David Phelps: Really, really great information, John. And the questions that you pose back are, yeah, I think most business owners don't think about those. And just posing those questions, and developing answers or solutions to those, would solve a lot of the conundrum and the dissonance that we tend to carry. Let me ask you this then, is there a minimum client, company size? Is it by revenue? Is it by number of employees? How do you evaluate if, again, if your services at pipeline.io would be transformative for a company. What's the frontline vetting you would do there?

John Way: Yeah, so basically we take a look at a company and obviously we're not looking for solopreneurs. I mean, obviously solopreneurs could potentially use pipeline, but they don't really get the true benefit of it. Once you start becoming a team of, let's say five or something like that, then that's where you start taking advantage of something like pipeline. Because now you have to delegate, there are people on your team. And usually we try to work with small businesses. So businesses that are under 250,

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those are the types of business that we have. We usually concentrate on various departments. Departments that are a few people, like five people, 10 people or something like that, and we go department at a time. Because those small teams generally need the most amount of help and those are the people that we tend to work with.

David Phelps: Very good. So best way for people who are interested in learning more about what you do, John, and about pipeline.io. What's the best way to connect with you?

John Way: Definitely look us up on our website, pipelineapp.io. There's a contact us form that we can definitely initiate a contact with us, reach out to us. You can also find me on LinkedIn, so look for John Way on LinkedIn and make a connection, shoot me a message. I love to have conversations with other like-minded business owners and stuff like that, to have conversations and so on.

David Phelps: Well, I can definitely say, John, I enjoyed our conversation. That's why I brought you back, you are easy to talk to. I felt like we had a lot of synergy, commonalities right out the gate, and that's what gave me the feeling that you definitely have figured some things out that other business owners would certainly be open, and should at least take a look at for consideration. So I really want to thank you for your time today and sharing the insights and experiences that you have learned. And also now bringing solutions to many who are trying to scale and grow their businesses.

John Way: Awesome, it was a pleasure. I'd love to be on again. Thank you so much.

David Phelps: We'll do it.

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