

Curriculum Vitae

Peter Jay Sorenson CMC®

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Areas of Expertise

Organizational Behavior, Organization Design, Innovation, Organizational Ethics, Strategy Formulation and Implementation, Board Governance, Social Responsibility, Social Entrepreneurship, Strategic Human Resource Management, Leadership and Executive Development, Consulting, Meeting Design and Facilitation, Merger & Acquisition, The Future of Healthcare

Summary

I have over thirty-five years of experience in business, government, and nonprofit organizations with an emphasis on proactive efforts to gain and maintain sustainable competitive advantage in the marketplace. The work content has included strategy formulation and implementation, organization design, change leadership, business process redesign, information system design and implementation, (root) cause analysis and solution development, team effectiveness, conflict mediation and resolution, and executive and management development, mentoring and coaching of leaders. Each opportunity has required strong leadership, motivation, and energy to influence organizational change.

I am known for my ability to see the big picture, make sense of messes, and lead teams through the resolution of complex issues. I relate well to people from all stations of life, speak frankly, and have a practical eye for getting things done.

My consulting and coaching practice focuses on driving the creation of tangible value by building and leveraging interlocking webs of intangible assets. These intangible assets include the discovery, innovation, and new product development processes, organizational structure and processes, human resource practices, information technology systems and practices, branding and marketing strategy, leadership brand, and organizational culture. These intangible assets can be designed as foundations for and infrastructure to the development of high performing organizations and value chains.

Education & Certification

1979 – M.A., Organizational Behavior, Graduate School of Management, Brigham Young University, Provo, Utah, 1979.

1976 – B.A., Interdisciplinary Behavioral Sciences, University of Washington, Seattle, Washington, 1976.

2002 – Certified Management Consultant designation from the Institute of Management Consultants Awarded in April 2002 (See www.imcusa.org for information on the CMC® designation)

Awards

2013 – The Organization Development Network awarded Peter Jay Sorenson CMC® the “Sharing the Wealth Award” named in honor of Kathy Dannemiller. The award is given for freely sharing time, talent, energy, knowledge, and expertise with others over an extended period of time through teaching, mentoring, and coaching relationships. This extended commitment embodies the values of generosity, empowerment, and inclusion. These actions help to ensure that the next generations of organization design and change leaders and professionals will be prepared to solve the intractable messes of the future.

Professional Services, Experience, and Accomplishments

Strategic Organization Design, Inc., Dallas/Fort Worth, Texas
Consulting Firm – Strategic Organization Design, Social Entrepreneurship, & Change Leadership Consulting; Executive Coaching
July 2010 – Current

Social Entrepreneur, Principal, Executive Coach and Consultant

- Designed and conducted a strategic planning off site meeting with a not for profit organization in the healthcare sector. Dealt with the issues of turbulence and competitive threats in the market environment. Moved the senior leadership group to a position of developing an intentionally designed strategic future while building in the flexibility to respond from a strategic perspective to emerging issues and events. Dealt with the impact of Affordable Care Act provisions and exercising influence in both the legislative and regulatory environments.

- Co-revised and team-taught a course on Blow Out Preventer Downtime Reduction for an offshore drilling company. The course has been in place for 6 years (pre-dating the Macondo Incident) and is a key element in building the “Culture of Safety” being prescribed for all offshore work in the Gulf of Mexico by BSEE and the US Coast Guard.
- Delivered workshops on the transition from individual contributor to supervisor for a number of clients in a variety of industries and locations. The workshop and the feedback and development that are a part of the workshop help people make the transition in 1 to 2 years rather than the usual 5 years.
- Designed and facilitated a three day “Teams and Teamwork” workshop for an aerospace electronics organization. The purpose of the workshop was to develop a well-rounded understanding of the types of teams in the organization, the roles those teams play, and the participants roles as creators, leaders, and members of teams. This workshop used experiential exercises, lecture/discussions, small group exercises, and personal action planning methods to promote deep learning and application. It was one of a series of 12 workshops for 15 people who are predicted to have senior level responsibilities in the future.
- Led change management on the redesign of a sales process in a high technology organization striving to fully implement SalesforceDotCom and create a seamless integration between organizational units from first contact to full implementation of products and service solutions.
- Co-organized, promoted, and conducted a two day conference for 200 people with Warner P. Woodworth, Ph.D. in less than 6 weeks in October and November 2010. The conference was for Non-Governmental Organizations (NGOs) doing humanitarian work globally and bore the title “NGOs: Surviving and Thriving in Times of Economic Recession.” The conference was held on the campus of Brigham Young University and featured 4 keynote speakers and over 40 concurrent sessions.
- Conducted a two-week site visit to two work locations in Uganda to assess the operations of a non-profit organization focused on eliminating poverty and creating economic and social self-sufficiency. Coached country leaders on leadership and project management, worked side by side with volunteers on projects, interviewed and did site visits with partner NGO leaders, government and business leaders.

- Conducted a research study for a large nonprofit organization facing significant difficulty as a result of the decrease in donations due to the recession. The organization was making a significant change in strategy that required an improvement in collaboration within and outside the organization and a substantial improvement in the innovation process to bring new ideas and projects to fruition. Conducted more than 40 interviews with key leaders and prepared and delivered analysis and recommendations to the senior leadership team.
- Coaching: Over the last fifteen years I have had a steady stream of coaching clients from for-profit, nonprofit, and governmental organizations. Most of these leaders are facing complex marketplace and organizational challenges that are “wicked problems.” The coaching involves examining their role in strategy formulation, problem solving and change implementation in their organizations. Most are also struggling with the conceptual, psychological, and behavioral transition from functional leadership roles to strategic general management leadership roles. In some cases these leaders have potential de-railing characteristics that they must alter in order to succeed.

GINKGO ENTERPRISES, Dallas, Texas
 Consulting Firm – Strategic Organization Design, Social Entrepreneurship, &
 Change Leadership Consulting; Executive Coaching
 September 1995 – July 2010

Consultant, Executive Coach, Principal, and Social Entrepreneur

- A growing healthcare organization had started new ventures and acquired new units. The executive team needed to ramp up their roles to the general management level. Delivered executive coaching with “C” level leaders and conducted a structured organization design process. The coaching and design process guided them from strategy formulation to implementation by designing the organization that could ensure that the strategy would fulfill its potential.
- Conducted a series of four one-day workshops for senior technical professionals to support their transition to being internal business consultants supporting the business units in a building materials organization. These workshops addressed the issues of psychological and conceptual transition from a technical to a business perspective as well as specific competency development challenges the participants would face. The consulting process was also introduced with practical

application assignments between the workshops to serve as action learning opportunities.

- Conducted a one-day workshop on “Coaching in a Context” for 15 people who are predicted to have senior level responsibilities in the future, their mentors and supervisors in a governmental organization. This workshop focused on how to identify and address difficult human performance, contribution, and engagement problems. Mentoring and coaching as well as other approaches were introduced.
- Conducted a half-day workshop for 100 people in a quasi-governmental organization on the topic of creating breakthrough change on an individual and organizational level. Presented multiple models that are useful in knitting together a conceptually sound, practical change process in an organization facing complex business issues that are inhibiting organizational success.
- Conducted a half-day workshop on “Level 5 Leadership” from Jim Collins research described in the book Good to Great for senior leaders in a governmental organization.
- Designed and facilitated a two day off site meeting for the board of directors of a small nonprofit organization. Addressed the issues of board roles, organizational strategy, fundraising, and operations planning.
- Facilitated deliberations of a trans-organizational team of representatives of law enforcement, judiciary, family shelters, religious, and other stakeholders involved in delivering services to families experiencing family violence. Developed a definition of the problems faced by these families and an outline of how the various stakeholders can collaborate to provide integrated solutions to families.
- Designed and conducted a series of four half-day workshops designed to support people transitioning from functional leadership roles to general management roles in a fast growing hydrocarbon related business. Addressed critical competencies that had been identified in multi-rater feedback surveys, individual development plan preparation, and interviews with key leaders regarding the future of the business.
- Created a project management process and training workshop based on best practices in business project management and best practices in community mobilization in poverty stricken areas of the world. Designed the materials with a team of non-profit leaders, prepared the

supporting materials, delivered pilot classes, and prepared supporting materials for in-country reinforcement coaching of volunteer project leaders by country directors.

- Conducted a two-week site visit to Guatemala and El Salvador to assess the operations of a non-profit organization focused on eliminating poverty and creating economic and social self-sufficiency. Coached country leaders on leadership and project management, worked side by side with volunteers on projects, interviewed and did site visits with partner NGO leaders, and interacted with small business owners who were recipients of micro-credit loans and business training.
- Worked with senior management and human resources team members to implement a talent management process to transition more than 100 individual contributors to managers in a fast paced, growing, technically driven organization. This included designing and selling the concepts, logistical arrangements, delivery of courses, follow up on development planning for the participants, and evaluation of the results of the transition activities to demonstrate positive business impact.
- Consulted to a human resources team developing a performance management process for roll out in a 2000 employee organization in 8 geographically dispersed divisions. Gathered data on current practices in the organization, best practices in the industry, designed the process, supporting forms, and integration with the newly installed HRIS system. Supported implementation by a company wide project team.
- Designed and facilitated the process for a senior leadership team in the home building industry to develop and roll out a vision, values, purpose architecture for their organization.
- Conducted a research study to identify key cultural issues in a highly successful for-profit holding company experiencing a very difficult senior management transition that had created uncertainty and conflict. Using culture survey data, interviews, and strategy discussions identified critical areas that needed to be addressed in order to restore order and align the organization around a new strategic direction created by a reorganized senior leadership team.
- Designed and facilitated a one-day off site meeting for the department members of a metropolitan city focusing on service delivery issues and customer service issues. The meeting was held in response to conflict

deriving from unclear standards, citizens seeking exceptions to building codes, and the tumultuous interaction between city officials, city council, citizens, and the press.

- Guided a senior leadership team through an acquisition assimilation process in an insurance company. Created the necessary team structure to bring members of both companies teams together around critical business issues including sales and marketing, information technology, financial and customer management, and talent management.
- Facilitated a operations team tasked with creating a new business model in a series of meetings in which they designed a Strategy Map, Balanced Scorecard, and Matrix of Initiatives to support a turnaround project in a US based equipment manufacturing company serving the financial services market.
- Designed and facilitated a three day off site meeting of US based human resource leaders, their European based corporate leader, and several external consulting team members to support a multi-site US HR Group in the transition from Operational Focus to a Strategic Business Focus. Key issues were identified, discussed, and follow up plans prepared.
- Designed and facilitated a series of three multi-day off site meetings for the top 35 leaders in a for-profit building materials business aimed at creating a “First In Class” level of performance. Assessment of market conditions, opportunities, and challenges were made and presented. Teams were formed around critical business issues to engage in problem solving and resolution planning. Work was done between meetings to push initiatives forward and create positive results.
- Designed and facilitated formation and start-up of cross-functional teams attacking intractable design and production problems in an off shore oil equipment manufacturer. Designed and delivered root cause analysis training and facilitated large-scale (60+ people) problem/issue definition and go forward planning meetings.
- Joined a four person consulting team and an NGO Board of Directors on a trip to El Salvador to visit and participate in humanitarian service projects and redesign the business and marketing strategy for the organization. Conducted four months of research and work with the board to craft and roll out a new strategic direction and new operational plans.

- Created a process for increasing inventory turn over, decreasing inventory, and increasing cash availability in a contract electronics manufacturer. Included designing a process for defining and improving materials management practices and more effective utilization of enterprise system (BaaN based) constellations to support supply chain initiatives. Designed and conducted numerous large-scale (50+ people) meetings and designed a turnkey process and practice assessment and improvement process. Inventory turns went from 3.8 to 9.8. and \$1.5 Billion USD was freed up.
- Designed and facilitated a three-day meeting for cross-functional representatives (15+ people) of various partners in a global travel business consortium. Created a model of the ideal customer experience. This model was then used by the senior marketing steering committee of the consortium to define specific strategies, policies, and practices to be developed and implemented across all of the member corporations.
- Designed and facilitated a three-day meeting for the expanded leadership team (30+ people) in an offshore insurance and investment company. The meeting was aimed at ensuring a smooth succession in the general manager role, reorienting the business brand to be a balance between insurance and investment, and redesign of the business processes and organizational structure. Formed ongoing cross-functional teams to work critical go-forward issues.
- Designed and facilitated a one-day project team integration meeting of information technology and business team members in a global industrial company. The meeting focused on creating one project team with a mission to do full integration of SAP modules between the European Headquarters and the US Based Business Unit. Cultural and perception differences that were the root cause of conflict that could sabotage the success of the project were named and dealt with.
- Served on a team providing marketing and culture change support to the rollout of web-based knowledge and skills training for all employee groups in a large governmental agency (100,000+ employees). This included the creation of video and print material to support the communication process, project management, training of local focal point people, and integration of various teams supporting improvement initiatives and highlighting potential problem issues. Continued to support implementation beyond rollout.

- Served on a team conducting a full evaluation of current teaming practices (team renewal) for a multinational chemical company. Conducted interviews, pilot interventions with teams, and benchmarking research. Also supported joint labor-management steering team interventions. Gave broad-based recommendations for full implementation of a “team-based organization” approach and integration of teaming with supply chain management initiatives.
- Designed and implemented a variety of interventions supporting a large scale (100,000+ employees) change effort in a governmental agency. These efforts included project management, business process redesign, and the design of and facilitation of meetings at several levels of the organization.
- Created necessary infrastructure (without constipating bureaucracy) to support faced paced software development in high tech software start-up businesses. Conducted project design, project start-up, project management, project integration, and project review interventions and training.
- Conducted a project assessment of an enterprise-wide implementation of the SAP software on a global telecommunications network for a pharmaceutical company. Focused on change leadership, project management, and strategy implementation aspects of the project. Made specific recommendations for improving project leadership, team interaction, line leadership and user involvement, communication, measurement dashboard creation, and training.
- Custom designed an employee climate survey process for a 500 person entrepreneurial firm in the disaster recovery business. Included survey design, administration, processing, report preparation and feedback. Resulted in structural redesign of the organization and reinforcement of the leadership development process. The project continued through three iterations.
- Designed and facilitated discussions of a team implementation steering committee for a multi-national high tech manufacturing firm. Examined the purpose of teaming, senior management support, the start-up process, and developed specific steps toward effective implementation. Resulted in numerous modifications to their approach to using teams based on their business situation. Continued to support local and international teaming strategy for over two years.

PERSONNEL DECISIONS, INTERNATIONAL, Las Colinas, Texas

Consulting Firm — Assessment-Based Development of Organizations and Leaders
May 1995 – September 1995

Consultant, Organizational Effectiveness Practice Leader

- Served on a team that created an assessment and selection system for a high-tech, startup organization. This included strategic job modeling, creation of system components, and training people to use the process. The organization quickly hired over 200 people to meet facility startup lead-time requirements.
- Conducted outdoor experiential exercises to illustrate key leadership principles and processes for a high-tech organization in the midst of a major organizational transformation. Facilitated dialogue sessions to ensure application of learning to the organizational context.
- Served as Project Lead to create a process for assessing, selecting, and developing future high-tech manufacturing facility leaders. This included creation of a future-oriented strategic performance model to define job roles, activities, and competencies in leadership, business, organizational, and technical aspects of the job.

BOEING DEFENSE & SPACE - IRVING, Irving, Texas
Manufacturing Electronics Equipment for Boeing Commercial Aircraft
April 1992 – May 1995

Organizational Design Administrator

- Facilitated realignment of all improvement initiatives to support the implementation of enterprise resource planning software (BaaN) in the business. This included making tradeoffs on priorities, resource allocation, initiative project shutdown, integration of initiatives, and start up of the new project.
- Led senior managers through a strategy formulation and macro organizational design process that focused on developing sustainable competitive advantage. The emphasis was on aligning core business processes with one another, the strategy, and the marketplace.
- Redesigned the organization to be a process- and product-focused organization to support strategy implementation. Organized people into cross-functional teams around the core business processes rather than traditional functions. Designed the macro organizational structure, micro organizational structures, and supporting systems.

- Diagnosed and confronted problems in the “New Manufacturing Process Design and Implementation Process” on the Boeing 777 Project. This led to numerous corrective action projects that cut across all organizational functions within the Irving and Seattle electronics design and manufacturing communities.
- Designed and conducted large-scale meetings (60 to 100 people) to accomplish a variety of organizational purposes. This included high levels of participation and interaction to get input and buy-in to the redesign process.

GINKGO ENTERPRISES, Dallas, Texas
 Consulting Firm – Strategic Organization Design, Change Leadership Consulting
 & Human Resource Development; Executive Coaching
 November 1990 – April 1992

Consultant, Principal, and Entrepreneur

- Designed a customer service assessment and measurement system for a staff service group within a large multinational oil company. The system focused on defining customer requirements and tracking how well requirements were being met.
- Design team member on the overhaul of a successful management development course. The course is designed to help participants understand and develop skill in performing their role in mentoring and influencing organizational members to improve their personal contribution and the flow of their career. Also served as a trainer for course delivery.
- Conducted a benchmarking process between a large multinational oil company and a recognized world-class organization. The effort included interviews, briefings, and a site visit. This process altered the point of view of the task force members and influenced the design of several organizational systems.

ROCKWELL INTL., SWITCHING SYSTEMS DIVISION, Downers Grove, IL
 Design, Sales, Manufacture, Installation and Service of Telephonic Computer
 Systems and Switches
 December 1989 – November 1990

Manager, Organizational and Human Resources Development

- Diagnosed organizational problems with an employee survey and a careful evaluation of customers, markets and competitors. Developed a process to involve a large cross-function, cross-hierarchy group in designing and implementing a strategy-driven organizational redesign.
- Researched, developed, and implemented a new and very different business strategy. This strategy gave a new sense of purpose to members of the organization and provided the guiding thread needed to weave together the business processes and functions. The product development and product delivery processes were redesigned. Time-to-market, quality, and cost measures improved.
- \$600,000 of unnecessary overnight delivery costs led to a redesign of the sell-make-deliver-install business process. A 60% improvement in installation time and a 53% savings in installed cost yielded a projected \$4,000,000 in annualized savings.
- Designed and implemented a data gathering and mediation process to resolve design disputes between marketing and engineering. Focus groups with end users and customers identified requirements and preferences for product features. A small start resulted in the redesign of the product development process.

GENERAL DYNAMICS, FORT WORTH DIVISION, Fort Worth, Texas
 Design and Manufacture of the F-16, F-22, and their Manufacturing Processes
 February 1988 – December 1989

Production Specialist, Manufacturing Development

- Diagnosed presenting problems for the business and developed a conceptual framework and eleven point plan of action to mobilize and coordinate improvement initiatives.
- Designed and lead the key production leaders through a strategic planning process to proactively respond to major market and internal changes. Identified dreadful barriers to progress.
- Laid the groundwork for implementing a total quality management initiative by guiding the Production Management Team through a values clarification and articulation process. This resulted in an expressed desire to move from an authoritarian style of management to one that is more consistent with the principles of TQM and high performance systems.

- Designed and implemented a comprehensive assessment, selection, and development process for 600 first-line supervisors with a capacity to select and prepare 150 new supervisors each year.
- Designed, organized, orchestrated and followed up on numerous large-scale management (1st level to VP) meetings for groups of 50 to 800 people. High levels of participation and interaction made the meetings excellent working vehicles for changing the organization's strategy, culture, and business processes.
- Facilitated a cross-functional team charged with implementing an innovative, technically sophisticated measurement technology on a new aircraft project. This technology was vital to meeting the exacting contractual quality requirements. Members of the team came from four separate functional areas with a history of tacit and open interpersonal and political conflict.
- Facilitated a cross-functional team working on a critical part with a high cost of quality and a high rejection rate. Design changes in the part and the manufacturing process reduced the scrap rate to zero in a four-month period of time. The team also implemented a statistical process control measurement system to monitor the manufacturing process in a tense union setting.
- Facilitated a cross-functional quality SWAT Team with a new team leader. Confronted and mediated conflict with hostile customer in-plant representatives. Problems with the measurement tracking system and the reporting process were solved so that manufacturing process problems could be corrected.
- Implemented a behavior modeling style management training program based on sound values and principles that was aimed at improving cooperative behavior of the work force. Rigorously designed and validated research data showed that subordinates and bosses of first line supervisors saw improvement in supervisor behavior. Union representatives also commented favorably about the improvements.
- Lead a Technology Director and team through a strategic alignment process that included team building, task force work, and training for 250 people.

PETER JAY SORENSON, Big Flats, New York
 Consulting Firm – Strategic Organization Design & Change Leadership
 Consulting; Executive Coaching

April 1987 – February 1988

Organizational Consultant

- Taught statistical process control (SPC) in a community college sponsored small business training program.
- Led a successful manufacturing organization through a re-evaluation and integration of their total quality management, just-in-time, and cellular manufacturing processes. Changed the leadership focus, organizational structure, and personnel in key positions.
- Served as a shadow consultant on strategic alignment for a director of human resource development in a world-class innovative organization.

CORNING GLASS WORKS, Corning, New York
Taking Materials Sciences Technology Ideas from Research and Development into the Marketplace
December 1985 – April 1987

Senior Consultant, Information Services

- Employed “socio-technical” analysis techniques to diagnose changes needed in a manufacturing plant. Helped integrate the total quality, just-in-time, and productivity improvement team processes from a business systems process perspective. Minimum annual cost savings on one manpower allocation recommendation was \$150,000.
- Redesigned a company wide (15,000 employees) climate survey to support the implementation of the total quality process. Included working with outside consultants, vendor selection, instrument design and validation, feedback process design, and the design of supporting documents. The survey has been used to guide major cultural change.
- Facilitated the quality improvement team (QIT) in the Controller’s Division and a system design sub-team creating the “Method Improvement Recommendation” (MIR) process. This process has become very successful and has been a model for similar suggestions systems throughout the company. It has also been a significant influence in the decision to create an high performance administrative profit center for Corning.

- Facilitated the quality improvement team for the top management administrative assistants (QIT-TM). This is the only QIT amongst a top management support group in the Fortune 500. This team did the following:
 - Created a simplified purchase order system that saved \$50,000 per year.
 - Created a centralized system for handling unsolicited resumes. The team decided that these people were customers too, and deserved dignified treatment. Each person sending an unsolicited resume now receives a personalized response.
 - Annual planning time was decreased from two days to two hours per year.
 - A development plan of guest speakers, benchmarking trips and seminars was established.
 - New technology solutions were proactively sought. New hardware, software, and a network linking the team members resulted in significant redesign of their work processes, interactions, and problem solving behaviors.
 - Annual meetings with administrative assistants down several layers in the organization were started. Briefings, training, and problem identifying and solving were on the agenda.
 - This group became a highly interdependent, proactive team rather than the isolated assistants to key executives.
- Teamed with a co-project leader with a technical background to design and implement an e-mail system (hardware, software, and network), including appropriate work design and leadership changes, in a start up new product division.

PETER JAY SORENSON, Houston, Texas
 Consulting Firm – Strategic Organization Design, Change Leadership Consulting
 & Human Resource Development; Executive Coaching
 February 1985 – November 1985

Organizational Consultant

- Conducted public and client sessions and certified instructors for Problem Analysis and Decision Making and Managing Participation Courses for Kepner-Tregoe, Inc.
- During this period of time my first wife and infant son died. These events resulted in a major rethinking of my future in light of having become the single parent of four children.

TENNECO OIL EXPLORATION & PRODUCTION, Houston, Texas
Oil and Gas Exploration and Production
October 1982 – January 1985

**Senior Employee Relations Administrator
Project Specialist, Corporate Administration**

- Directed a company-wide, 1000 person white collar quality and productivity project. Developed work measurement systems using participative methods. Reduced inventory of drilling equipment 60% (160MM to 70MM) and time for reconciliation of drilling project expenses 50% (6 to 3 months).
- Led strategic planning sessions for a Division General Management Team. Refocused the division strategy to a market and customer orientation. The long range plan, organization design and budget and measurement systems changed. Led the management team through a smooth internal succession process.

PHILLIPS PETROLEUM COMPANY, Bartlesville, Oklahoma
Oil and Gas Exploration, Production, Refining, and Marketing
June 1981 – September 1982

Management Training Senior Representative

- Developed a competency-based promotability and potential evaluation system, which has been used for selection, development, and succession planning in several companies.
- Coordinated company wide administration, instruction, and follow up for all Corporate Professional Development Courses. Included Kepner-Tregoe Problem Solving and Decision Making (Apex and Genco) and Participative Leadership (Telos) Courses. Also served as an instructor.
- Coordinated administration and delivery of the Levinson Institute Course “On Leadership” for High Potential General Management Candidates. Delivered by Harry Levinson, Ph.D. and Ralph Hirshowitz, MD.

PETER JAY SORENSON, Solon, Ohio
Consulting Firm – Strategic Organization Design, Change Leadership Consulting

& Human Resource Development; Executive Coaching
August 1979 – June 1981

Organization Consultant

- Managed survey diagnosis and facilitated data feedback and problem solving activities. Organizational structure and personnel changes were implemented. Began a program to counter technical obsolescence.
- Planned and conducted feedback sessions following up an organizational survey that was designed to assess the impact of several years of significant change. Developed a strategy and process of leading and managing future change to help decrease resistance and increase the effectiveness of change.
- Conducted a benchmarking research study of the available literature and current organizational practices of various comparable firms. These data were used in policy-making discussions and decisions regarding human resource systems and practices to support the organization's marketplace strategy.
- Conducted an intensive evaluation of top level managers' management skills using competency-based instruments and interviews. Profiles of individual strengths and weaknesses and individual development plans were constructed from the data gathered.
- Consulted to and Coach the Senior Human Resources Officer in redesigning his organization to more effectively integrate human resource services across 8 manufacturing facilities and the corporate organization.

STOUFFER FOODS CORPORATION, Solon, Ohio
Design, Sales, Manufacturing, & Distribution of Frozen Food Products
April 1979 – August 1979

Management & Organizational Development Specialist

- Designed and conducted a twelve-week management trainee program for new college graduates. This rotation and training process gave a broad exposure to the organization and helped participants get up to speed quickly. Retention rates improved.

- Developed and implemented a manpower planning and continuity system which supplied managers with timely, accurate data about employee performance and potential. This data was used for assessment, selection, and development purposes.

CLARK EQUIPMENT COMPANY, Battle Creek, Michigan
 Design, Sales, Manufacture, & Distribution of Industrial Trucks (Fork Lifts)
 January 1978 – April 1979

Employee and Organizational Development Supervisor

- Facilitated the redesign of an assembly line to solve productivity and quality problems. A team management structure was developed using participative techniques. Improvements included 7% reduction in quality defects, an 11% reduction in downtime, a 13% reduction in unit cost, and a 53% reduction in model changeover time.
- Managed an assessment center process for selecting and developing supervisors. Selected 32 supervisors in 14 months with a 20% improvement in performance.
- Conducted an organizational analysis survey for the Information Services and Product Engineering organizations. This included administering the survey and conducting feedback and action planning processes. This process surfaced critical organizational issues that had never previously been dealt with on a constructive basis.

Academic Teaching Experience

University of North Texas – Dallas, Dallas, Texas
 Division of Urban and Professional Studies
 January 2011 – Current

Adjunct Instructor

- Business 4940 – Business Policy
- Management 3880 – Business Ethics & Social Responsibility
- Management 3820 – Management Concepts
- Management 3720 – Organizational Behavior
- Psychology 3520 – Organizational Psychology

Western Michigan University; Kalamazoo, MI

School of Business
September 1978 – May 1979

Adjunct Instructor

- Management 300 – Fundamentals of Management
- Management 358 – Personnel Management

Brigham Young University; Provo, UT
Department of Organizational Behavior, Marriott School of Management
January 1977 – May 1977

Graduate Assistant

- Organizational Behavior 321 – Introduction to Organizational Behavior

University Guest Lecturing:

Pete has been a guest lecturer at The University of North Texas at Denton, The University of Texas at Arlington, The University of Texas at Dallas, Southern Methodist University, and Brigham Young University.

Research Interests

- Action Research and Service Learning as Tools to Create Successful NGOs and Social Entrepreneurs:
 - Creating Economic, Social, and Cultural Self-Reliance in Individuals, Families, and Societies
 - Elimination of Poverty and Conflict in both the Developing World and Developed World
 - Economic and Social Development in African Nations
- Creation of Strategic, Intentional Organization Design Models and Processes that Match the Circumstances found in the 21st Century
 - Designing Webs of Intangible Assets to Create Thriving Organizations
 - Building Organizational Structures and Processes that add value and do not create monolithic, ossified, constipated bureaucracies
 - Crafting a Toolkit for Successful Merger and Acquisition Creation and Integration
 - Creating a Successful Healthcare Industry for the 21st Century
 - Organizational Ethics

Volunteer Nonprofit Board Experience

Dallas Fort Worth Organizational Development Network

- Planning Team Member – 1993 – Current

HELP International (Global Humanitarian Service)

- Member of the Board of Trustees – 2006 – 2011
- Consultant to the Board – 2002 – 2006

Institute of Management Consultants, USA:

- Member of the Board of Directors – May 2007 – May 2010
- Vice Chairman of the Board – May 2008 – May 2009
- Member of the Ethics Committee – April 2011 - Current

Institute of Management Consultants, USA, Dallas Fort Worth Chapter:

- Chapter President – 2002 – 2004
- Member of the Board of Directors – 2000 – 2009 & 2013 – Current
- Steward of the Consultants' Workshop – A 2 Year Monthly Series on Marketing and Selling Consulting Services – June 2013 - Current

Socio-Technical Systems Roundtable (STS-RT)

- Member of the Board of Trustees (Stewards) 2005 – 2010
- Member of the International Conference Planning Team 1994, 2001, & 2016

Speaking Engagements & Conference Presentations

2016:

- Opening Up Your Silos & Detecting Weak Signals, (City of Dallas, Dallas, TX, January 2016)

2015:

- Organizational Fracking: Opening Up Your Silos, (DFW OD Network, Dallas, TX, July 2015)
- Deliberately Designing Innovation into Your Organizational Fabric: The Corning Example (Festival of Connecting: International Workshop on Teamworking, Advanced Workplaces for Advanced Businesses, and Socio-Technical Systems Design Roundtable, 11 September 2015)

2014:

- Moving Towards Shared Prosperity in the Hydrocarbon Energy Sector: Innovation Required (Overcoming Barriers and Dismantling Filters, and Designing Innovations) (LERA 66th Annual Conference, Portland OR, 29-31 May 2014)

- Organization Design: By Intentional Design or By Default? (DFW OD Network, Dallas, TX, July 2014)
- Inter-Organization Design – Off Shore Oil & Gas Example (Socio-Technical Systems Design Roundtable, 19 September 2014)
- The Joys and Sorrows of the Fracking Mess! The Collision of Climatology, Geopolitics, Innovation, Technology, Shared Prosperity, Social Justice, and Public Policy (Pecha Kucha Presentation at the Socio-Technical Systems Design Roundtable, 19 September 2014)

2013:

- Successful Consulting (Institute of Management Consultants, USA, DFW Chapter Practice Development Workshop, January 2013)
- Measuring Organizational Performance with the Quintuple Bottom Line (Financial, Environmental, People, Legal & Ethical, and Technology & Innovation) (Institute of Management Consultants, USA, DFW Chapter Quick Start Workshop, February 2013)
- Silos! Glorious and Beloved Silos! (Fort Worth / Mid-Cities ASTD Chapter Meeting, April 2013)
- Contributing Value Clients Want to Pay For! Getting Paid for That Contribution! (Institute of Management Consultants, USA, DFW Chapter Practice Development Workshop, May 2013)
- Senior Practitioners' Forum: Being Consultants to the Consultants (DFW OD Network, Dallas, TX, August 2013)

2012:

- Eyes, Ears, and Questions – The Discovery Approach to Breakthrough Solutions (Institute of Management Consultants, USA DFW Management Consultants' Forum, January 2012)
- The CIO's Contradictory Mindsets: Balancing the Organization's Opposing Needs (TechExecs Dallas CIO & IT Leadership Forum, March 2012)
- Disturbing the Status Quo: Doing Innovation (Pecha Kucha Presentation - 20 Slides with 20 Seconds per Slide - Fast Targeted Information)(AMCP - Association of Change Management Professionals, Global Conference, Las Vegas, NV, April 2012)
- Innovation: The Missing Ingredient in Rethinking and Resetting (ASP, The Association for Strategic Planning, 2012 Annual Conference, Chicago, IL, April 2012)
- Expanding Your Horizons: Collaborating with Clients and Colleagues (Institute of Management Consultants, USA DFW Practice Development Workshop, July 2012)
- Is Managing Change the New Organizational Development? What's the Connection and Who Cares? (DFW OD Network, Dallas, TX, February 2012)

- How to Fuel Your Business with New Ideas (Small Business Seminar, The Oak Cliff Chamber of Commerce at the University on North Texas - Dallas, October, 2012)
- DFW OD Network Program Planning for 2013 (DFW OD Network, Dallas, TX, November 2012)

2011:

- Successful Consulting (Institute of Management Consultants, USA, DFW Chapter Practice Development Workshop, January 2011)
- When 70%+ Fail – How Do You Make Mergers Work? (DFW OD Network, Dallas, TX, February 2011)
- Me & the Organization & How I Contribute (CapitalOne Project Managers' Forum, Plano, TX, May 2011)
- Contributing Value Clients Want to Pay For! Getting Paid for That Contribution! (Institute of Management Consultants, USA, DFW Chapter Practice Development Workshop, June 2011)
- Innovation: It's About How You Think & What You Do! Part 1 (DFW OD Network, Dallas, TX, August 2011)
- Innovation: It's About How You Think & What You Do! Part 2 (DFW OD Network, Dallas, TX, September 2011)
- How to Fuel Your Business with New Ideas (Small Business Seminar, The Oak Cliff Chamber of Commerce at the University on North Texas - Dallas, October, 2011)
- Making Teams & Teamwork Work (TASSCUBO - Texas Association of State Senior College & University Business Officers, Frisco TX, October 2011)
- Google and Innovation (SMU Engineering Class, ME 5-7369, Managing Technology and Innovation, October 2011)
- Disturbing the Status Quo (ASTD Mid Cities, Fort Worth, TX, November 2011)
- Innovation in the Face of Adversity (American Airlines Organizational Change Management Network, Fort Worth, TX, November 2011)

2010:

- TAIL AND DOGS: Who's Wagging? The Inversion of "Technical Conversion Processes" and "IT Technical Systems" in Designing Organizations (LERA - Labor & Employee Relations Association Annual Conference, Atlanta, GA, January 2010)
- Crafting a Personal Approach to Leading and Influencing People and Organizations (Posey Leadership Institute, Austin College, Sherman Texas, February 2010)
- A Dialogic Approach to Designing Organizations (DFW OD Network, Dallas, Texas, March 2010)
- Coping with the Changes Implicit to Aging: Aging is NOT for Wimps!

- (Aging in America 2010 Conference - National Council on Aging, American Society on Aging - Chicago, IL, March 2010)
- Thinking and Acting Strategically (ASTD Fort Worth-Mid-Cities, Fort Worth, Texas, April 2010)
 - Stop Fighting Fires . . . Start Preventing Them: Balancing Strategy and Tactics (DFW OD Network, Fort Worth, Texas, April 2010)
 - Pull Sword from Rock: The CIO's Wrestle to Become Strategically Relevant (DFW TENG Meeting, Dallas, Texas, April 2010)
 - Stretch Yourself! Improving Your Strategic Agility (IMC USA DFW Practice Development Workshop, Dallas, Texas, August 2010)
 - Designing Knowledge Work and Knowledge Driven Organizations (DFW OD Network, Dallas, Texas, August 2010)
 - Uganda! Africa! Overcoming Challenges! Fulfilling Potential! (DFW Religious Communicators Council, August 2010)
 - Designing Knowledge Work and Knowledge Driven Organizations, with an Eye on Sort, Type, and Stripe (DFW Association for Psychological Type, Dallas, Texas, September 2010)
 - Tails & Dogs: High Consequence IT Systems Have Us By the Throat! (STS Roundtable Conference, Vancouver, BC, Canada, September 2010)
 - Value Consulting Clients Want to Pay For (IMC USA Confab, Reno, Nevada, October 2010)
 - Using Open Space to Determine the Way forward (Dallas ASTD Chapter Meeting, Dallas, TX, November 2010)
 - Africa! Overcoming Challenges! Fulfilling Potential! Life Cycles in NGOs and Action Research: A Quest for Economic, Social, Environmental, & Cultural Self-Reliance & Sustainability (MBA 539, Third World Development, Marriott School, BYU, Provo, UT, November 2010)
 - So You Want to Be a Knowledge Worker! (OB 321, Organizational Effectiveness, Marriott School, BYU, Provo, UT, November 2010)
 - Using Open Space to Create Self-Organizing Discussion Groups (Conference: "NGOs: Surviving and Thriving in Times of Economic Recession," BYU, Provo, UT, November 2010)
 - Integrating and Concluding Comments (Conference: "NGOs: Surviving and Thriving in Times of Economic Recession," BYU, Provo, UT, November 2010)

2009:

- Drop the Keel! Set the Sail! Steer the Rudder! A Leaders Guide to Breakthrough Change (NISH National Training and Achievement Conference, Atlanta, GA, May 2009)

2008:

- College/University Partnerships with Microcredit Funding Organizations: A Social Entrepreneurial Workshop On Fighting Poverty (Panel Discussion,

- United States Association for Small Business and Entrepreneurship Conference, San Antonio, TX, January 2008)
- Strategic Talent Management (Panel Discussion, IMC DFW Management Consultants Forum, Dallas, TX, February 2008)
 - Informed Improvisation - Discovering What Works: Action Research in Today's Organizations (DFW OD Network, Richardson, TX, March 2008)
 - Making a Silk Purse Out of a Sow's Ear: Transforming Culturally Based Viscous Cycles into Virtuous Cycles (DFW OD Network, Richardson, TX, May 2008)
 - Get It All in the Harness! Aligning Firm Brand, Leadership Brand, & Personal Brand to Achieve Breakthrough Results (DFW OD Network, Richardson, TX, July 2008)
 - I Will Bring You To Your Knees! The Hard Realities of Organizational Change (Marriott School of Management, BYU, Provo, Utah, September 2008)
 - Discovering What Works: Participatory Action Research in NGO's in Developing Countries and Communities (Marriott School of Management, BYU, Provo, Utah, September 2008)
 - Participatory Action Research: Praxis in Doing Global OD (Co-Presented with Warner P. Woodworth, Ph.D. of The Marriott School, BYU)(National OD Network Conference, Austin, TX, October 2008)
 - ROI from HRD: Demonstrating the Tangible Value Contributed by Intangible Assets (ASTD Dallas Chapter, Dallas, Texas, October 2008)
 - Managing the Life Cycle of Your NGO: What is the Next Step? (Co-Presented with Warner P. Woodworth, Ph.D. of The Marriott School, BYU)(11th Annual Economic Self-Reliance Conference, Provo, Utah, November 2008)

2007:

- What is Successful Consulting? (Practice Development Workshop, IMC DFW Chapter, Dallas, TX, January 2007)
- Socio-Technical Systems (STS) Theory & Practice: A Way to Workplace Democracy & High Performance – Concepts & Case Study (A Team Presentation at the LERA Annual Conference, Chicago, IL, January 2007)
- What is Consulting? Starting and Succeeding (IEEE Dallas Section, The Consultants Network, Richardson, TX, April 2007)
- ~~Pricing Strategies~~ – Creating Value Clients Want to Pay For (Practice Development Workshop, IMC DFW Chapter, Dallas, TX, June 2007)
- Action Research and Service Learning as Longitudinal Approaches to Poverty Eradication, Economic Development, and Human Development (Co-Written and Presented with Warner P. Woodworth, Ph.D. of The Marriott School, BYU)(Work Research Institute Action Research Conference, Oslo, Norway, September 2007)
- Using Action Research to Create Better Results (Economic Self-Reliance

Conference, Building Economically Self-Reliant Families, Economic Self-Reliance Center, BYU Marriott School, Provo, UT, November 2007)

2006:

- Where Did These Blossoms Come From? Digging into the Rootstock of our Organization Design and Organization Change Practices -- Reflections on Socio-Technical Systems Theory and Practice (DFW OD Network, Dallas, TX, February 2006)
- Doing the Intangible Asset Tango to Avoid a Mucked Up Merger Mess (Paper and Presentation 2006 Association for Strategic Planning Annual Conference, Long Beach, CA, February 2006)
- ROI Part 1: Demonstrating the Tangible Value Contributed by Intangible Assets (ASTD Mid-Cities Chapter, Hurst TX, May 2006)
- ROI Part 2: Demonstrating the Tangible Value Contributed by Intangible Assets (ASTD Mid-Cities Chapter, Hurst TX, July 2006)
- Being Anxiously Engaged in Humanitarian Work (HELP International Annual Fundraiser & Reunion, Provo, UT, September 2006)
- Organization Development as Social Entrepreneurism: Interventions for Building Socio-Economic Justice (Co-Presented with Warner P. Woodworth, Ph.D. of The Marriott School, BYU)(DFW OD Network, Fort Worth, TX, August 2006)(National OD Network Conference, San Francisco, CA, October 2006)

2005:

- Why Do Good People Do Bad Things? The Impact of Culture on Individual and Organizational Action (Panel Discussion at the Association for Practical and Professional Ethics – APPE – Fourteenth Annual Meeting, San Antonio, TX, February 2005)
- Pondering the Breadth of Our Lives and the World Around Us, (Six Sigma Black-belt Conference, Bell Helicopter Textron, Hurst TX, February 2005)
- Doing the Intangible Tango! Creating Tangible Value with Intangible Assets (Dallas Area Industrial & Organizational Psychologists Group, Plano, TX, March 2005)(GFOAT Finance Directors Roundtable, Dallas, TX, April 2005)(State National Insurance Company Client Conference, Carefree, AZ, April 2005)
- (Marriott School of Management, Brigham Young University, Provo, UT, March 2005)

2004:

- Doing the Intangible Tango: Creating Tangible Value with Intangible Assets (DFW OD Network, Richardson, TX, March 2004)
- The Consultants Balancing Act: Promoting Brand, Selling Services, Doing Work (IMC USA DFW Practice Development Forum, Dallas, TX, March 2004)

- Should We Be Surprised by the Abuses at Abu Ghraib? (Dallas Area Industrial & Organizational Psychologists Group, Plano, TX, May 2004)
- Learning to See & Lead . . . in a Powerful Setting . . . The Dallas Museum of Art (DFW OD Network, Dallas, TX, July 2004)
- Doing the Intangible Tango: Organizational Capabilities and the Social System (Socio-Technical Systems Roundtable, Scottsdale, AZ, October 2004)
- Being Effective in the Consulting Roles and Process (Master of Market Research Class, Graduate School of Business, University of Texas at Arlington, Arlington, TX, December 2004)

2003:

- Promoting Brand, Selling Services, & Doing Work: A Consultant's Balancing Act (IMC USA National Conference, Shaping the Future, Chicago, IL, May 2003)
- Sources of Power in Governing and Changing Organizations (University of Texas at Dallas, MBA Program, Richardson, TX, May 2003)
- If Change is So Good Why Does It Hurt So Much? (Hanson Aggregates South Central Leadership Team Off Site – Dallas, Texas, August 2003)
- Building a Business Case for Change – An Airline Industry Case Study (DFW OD Network, Fort Worth, TX, October 2003)
- Tuning Up the Supply Chain – Getting Results from Enterprise System Constellations & Materials Management Common & Best Practices (Graduate School of Business, University of Texas at Arlington, Arlington, TX, October 2003)
- A New Definition of Leadership: Achieve Results, Build Extraordinary Leaders, & Create Intangible Value (Dallas ASTD OEP SIG, Dallas, TX, October 2003; Marriott School of Management, Brigham Young University, Provo, UT, November 2003)

2002:

- Can I Get Change for a Dollar? No! Not Even Close! (Marriott School of Management, Brigham Young University, Provo, UT, January 2002)
- Participative Consulting for Technology Projects: How to Get User and Executive Buy-In (Panel Discussion at DFW IMC Chapter, Management Consultant's Forum, Dallas, TX, January 2002)
- Influencing Changes in Leader Thinking and Behavior (Panel Discussion at DFW IMC Chapter, Management Consultant's Forum, Dallas, TX, March 2002)
- Pornography . . . Campaign Finances . . . Terrorism . . . Enron: Dissolving Intractable Organizational Problems (Messses) (MOB Conference, Brigham Young University, Provo, UT, April 2002)
- In Quest of an Integrated Knowledge Strategy & The Role of Communities of Practice (Graduate School of Business, University of Texas at Arlington,

- Arlington, TX, July 2002)
- Let the Business Results Dog Wag the Teamwork Tail (13th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 2002)
 - Thinking Your Way Out of a Wet Paper Bag (IMC Confab, Reno, NV – October 2002)
 - Hooking Up Pipes & Wires: Integrating Human Resource Systems with the Business (HR Southwest, Fort Worth, TX – October 2002)
 - Sustainable Supply Chains, the 3rd World Perspective (Panel Discussion at STS Roundtable – New Orleans, LA – October 2002)
 - Being Effective in the Consulting Process and Role, (Masters of Market Research, Graduate School of Business, University of Texas at Arlington, Arlington, TX, November 2002)

2001:

- Being Effective in the Consulting Process and Role, (Fall Alumni & Advisory Board Meeting, Masters of Market Research Program, Graduate School of Business, University of Texas at Arlington, Arlington, TX, October 2001)
- I've Got the...Inventory...Inventory Turnover...Cash Flow...Materials Management Practices...ERP/IT...Supply Chain...Blues!!!! (Graduate School of Business, University of Texas at Arlington, Arlington, TX, November 2001)
- Being Effective in the Consulting Process and Role, (Masters of Market Research Program, Graduate School of Business, University of Texas at Arlington, Arlington, TX, November 2001)

2000:

- “Morphing” Cross-Functional Teams (MCFT) – Go Ahead! Move My Cheese! Make My Day! (DFW Chapter, ISPI, Dallas, TX, January 2000)
- The Team Renewal Process: Achieving Higher Levels of Performance (Panel Discussion, 11th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 2000)
- Peer Review Process at Deluxe Check (Panel Discussion, 11th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 2000)
- Networking for ROI (11th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 2000)
- An Approach to Improving Inventory Turns
- The Wizardocracy Leadership Brand and/or a Process for Attracting, Motivating, & Retaining Knowledge Workers (Panel Discussion with Holt Sorenson and his colleagues from Counterpane Internet Security)(IEEE-USA 11th Biennial Careers Conference, Utilizing & Retaining Technical Professionals in Today's Marketplace, San Jose, CA, November 2000)

1999:

- Some Ideas: The Transition from Graduate School to the Job Market and the Consulting Role, (Industrial and Organizational Psychology Program, University of North Texas, Denton, TX, April 1999)
- Being Guided by Music: The Symphony & Jazz Metaphors in Organizing (Individual, Team, & Organizational Effectiveness Conference – 7th Annual Symposium Sponsored by the Center for the Study of Work Teams, University of North Texas, Denton, TX, May 1999)(DFW OD Network, Fort Worth, TX, October 1999)
- Weaving the Whole Cloth: Creating and Sustaining Team Based Organizations (Achieving Organizational Outcomes through Teaming and Employee Involvement Conference, Center for the Study of Work Teams, Newport Beach, CA, June 1999)
- Consulting Skills for Knowledge Workers: Getting Your Expertise Used
- “Morphing” Cross-Functional Teams (MCFT) – Making Your Day by Moving Your Cheese
- Thinking About and Fixing Cause
- Why Are You Here? How to Get the Most from Your Conference Experience, (10th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 1999)
- Is it My Imagination, or Do Organizations Suck? Interconnections, Thinking Skills, Conspiracy, and Immorality in the Organizational Landscape (Brigham Young University, Provo, UT, October 1999)

1998:

- Preventing the Ambush: The Impact of Dysfunctional Teams & Groups on the Consulting Process (North Texas Association of Professional Consultants, Dallas, TX, April 1998)
- Dilemmas and Learnings ... Large Scale, Cross-Functional Information Technology Projects: Why They Fail, How They Succeed (Navigating Large Scale Change Conference, University of Texas at Dallas Executive Education, Richardson, TX, May 1998)
- Dilemmas and Insights . . . Large Scale, Cross- Functional Information Technology Projects: Why They Fail, How They Succeed: The Case of Enterprise Wide Software Projects (Baan, PeopleSoft, SAP, Oracle, and Others) – (The Ecology of Work Conference, Louisville, KY, June 1998)
- Networking Group: How to Get the Most from Your Conference Experience ROI (9th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 1998)
- Getting a Grip on Critical Thinking
- Leadership in a Re-Engineered Environment (9th Annual Conference & Career Expo, NSHMBA, Dallas, TX, October 1998)

1997:

- Implications: Strategy Formulation and Implementation as an Organization Design and Change Process (DFW OD Network, Fort Worth, TX, April 1997)
- Dilemmas & Insights . . . Large Scale, Cross-Functional Information Technology Projects: Why They Fail, How They Succeed (Panel Discussion, 8th International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 1997)
- Why are You Here? Increasing Your Conference ROI (8th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 1997)

1996:

- Seeing Whole Systems (Effective Work Teams Conference, Center for the Study of Work Teams, University of North Texas, Dallas, TX, March 1996)
- Increasing the Return from Your Conference, Site Visit, and Bench Marking Investment (Panel Discussion, 7th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 1996)
- Teams from the Business Perspective: The General Management View (Panel Discussion, 7th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 1996)
- Thinking Determines Outcomes: The Elements & Processes of Well-Founded Thinking
- Creating Sustainable Competitive Advantage: A General, Simple Organization Design Model

1995:

- Large Scale, Fast Cycle Time Events and Change Processes (DFW OD Network, Richardson, TX, May 1995)
- Why Teams Fail – Panel Discussion (6th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 1995)
- I Can Feel This Change Happening!!! Poise in Handling the Pain, Rage, Delight, and Terror in Transition (6th Annual International Conference on Work Teams, Center for the Study of Work Teams, Dallas, TX, September 1995)
- Multitudes of Models: Thinking About Organizations So that They Make Sense

1994:

- Pitfalls in Thinking About and Doing Change (Symposium on Work Teams, Center for the Study of Work Teams, Dallas, TX, February 1994)

1993:

- If Change is So Good . . . Why Does It Hurt So Much? Description and Prescription for Helping Things Go Better (4th International Conference on Self-Managed Work Teams, Center for the Study of Work Teams, Dallas, TX, September 1993)
- Gainsharing: A Live Case Presentation
- Core Teams: Delivering Technical Support to the Manufacturing Process
- Cross-Functional Teams: Delivering Technical Support to the Manufacturing Process

1991:

- Retrieving Discretionary Effort and Initiative After a Crisis: Putting Humpty Dumpty Together Again (IEEE 7th Biennial Careers Conference, Change & Competitiveness & Careers, Denver, CO, October 1991)

1985:

- A Process for Improving White Collar Productivity (NASA Quality & Productivity Improvement Conference, Houston, TX, November 1985)

1984:

- Learning to Juggle as Learning About Learning Process (Organizational Behavior Teaching Conference, Boise, ID, May 1984)
- Productivity Improvement: Organizational Behavior in the Bunkers and Revetments of the Organization (Organizational Behavior Teaching Conference, Boise, ID, May 1984)

Writing

- Forthcoming: Sorenson CMC®, Peter Jay, Thinking Your Way Out of a Wet Paper Bag, December 2016.
- Forthcoming: Sorenson CMC®, Peter Jay, Organizing! Deliberate Design, March 2016.
- Gamble, Ph.D., Doug, Nina Gregg, Ph.D., Pam Posey, Ph.D., Peter Jay Sorenson CMC®, “Movement Toward Shared Prosperity: Overcoming Barriers, Dismantling Filters, and Designing Innovations,” Proceedings of the 66th Annual Meeting, LERA (Labor and Employment Relations Association, May, 2014).
- Sorenson CMC®, Peter Jay, “Silos! Beloved and Glorious Silos,” Unpublished Manuscript for use in Client Workshops, August 2010.
- Posey, DBA, Pamela A., and Peter Jay Sorenson CMC®, “Tails & Dogs:

Who's Wagging? The Inversion of 'Technical Conversion Processes' and 'IT Technical Systems' in Designing Organizations," Proceedings of the 62nd Annual Meeting, LERA (Labor and Employment Relations Association, 3-5 January, 2010, Pages 138-144.

[<http://leraweb.org/sites/leraweb.org/files/publications/Proceedings/Proceed2010.pdf>]

- Posey, DBA, Pamela A. and Peter Jay Sorenson CMC®, "Organizational Change: Using a Unique Fabric of Intervention to Tackle Complex Dilemmas" in Perspectives on Work, Published by the Labor and Employment Relations Association (LERA), Summer 2008.
- Woodworth, Ph.D., Warner P. and Peter Jay Sorenson CMC®, "Action Research and Service Learning as Longitudinal Approaches to Poverty Eradication, Economic Development, and Human Development," 29 September 2007, International Action Research Conference Sponsored by the Work Research Institute, Oslo, Norway, "Making the 'Practical Turn' Practical: Collaborations Across Nationalities, Professions, and Varieties of Action Research," Oslo, Norway, 10-12 September 2007 (Posted on the Web at: http://stsrroundtable.com/wiki/Reference:Action_Research_Approach_To_Poverty_Reduction)
- Sorenson CMC®, Peter Jay, "Doing the Intangible Asset Tango to Avoid a Mucked Up Merger Mess," Proceedings, ASP (Association for Strategic Planning) 2006 Annual Conference, February 2006, Long Beach, CA.
- Sorenson, Peter Jay, "Information and Knowledge, Book Review of Information Ecology by Thomas Davenport," Newsletter, Center for the Study of Work Teams, University of North Texas, Denton, Texas, Spring 1998.
- Sorenson, Peter Jay, "Increasing the Return from Your Conference Investment," Newsletter, Center for the Study of Work Teams, University of North Texas, Denton, Texas, Fall 1997.
- Sorenson, P.J., "Putting Humpty Dumpty Together Again or Retrieving Discretionary Effort After a Crisis," Careers Conference, 1991. 'Change & Competitiveness & Careers'. Conference Record., 1991 IEEE Seventh Biennial IEEE-USA
- Sorenson, Peter Jay, Linda R. Fisher, and Rose L. Kennedy, "The Two Faces of Change: It's a Choice!" Proceedings of the National Communications Forum, Volume 44, October 1990, page 80.

- Sorenson, Peter Jay, “A Process for White Collar Improving Productivity” – Written September 2004 to support a university based course on productivity and presented in September 1985 at an Industrial Quality and Productivity Conference at NASA in Houston Texas – based on white-collar productivity work at Tenneco Oil Exploration & Production.
- Sorenson, Peter Jay, “Parasite, Prostitute, and Patsy: A Social Scientist’s Adventure in a Complex Organization,” Internship Report, Department of Organizational Behavior, Marriott School of Management, Brigham Young University, February, 1978.
- Sorenson, Peter Jay, “The Helping Relationship,” Senior Thesis, General Studies 493, University of Washington, Spring 1976

Memberships

- Association of Change Management Professionals (ACMP)
- Association for Strategic Planning (ASP)
- Association for Professional and Practical Ethics (APPE)
- American Society for Training and Development (ASTD)
- American Society for Training and Development, Fort Worth/Mid-Cities Chapter (ASTD FW/MC)
- BYU Management Society
- Institute of Management Consultants, USA (IMC USA)
- Institute of Management Consultants, USA, Dallas/Fort Worth Chapter (IMC USA DFW)
- Labor and Employee Relations Association (LERA)
- OD Network (ODN)
- OD Network of Dallas Fort Worth (DFW ODN)
- Social Enterprise Alliance of North Texas (SEA-NT)
- Society for Human Resource Management (SHRM)
- Society of Petroleum Engineers (SPE)
- Socio-Technical Roundtable (STS RT)