General Session 5:
The Yin and Yang of Remote Employees

Panelists:
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Our Firms

- **DWC** – Entire workforce is remote.
- **Summit** - Blend of dispersed and in-office staff and people who do both, i.e. some are local but sometimes work from home rather than come to the office.
- **Pinnacle** – Blend of employees completely remote, employees in a second office, and the remaining team is in one main office, but nearly all administrators work remotely at least 1-2 days a week
“Remote” Employees

• Why do we even use this term?
• You just have employees. Why define them differently?
• Treat your remote employees the same as your on-site employees with respect to:
  – Flexibility in work schedules
  – How you measure success
  – Rewards and incentives
  – How/what you communicate internally.
  – Do you do anything extra to ensure the success of a remote worker that you do not do for your on-site employees?
Why Remote Employees?

• Technology has allowed it.

• Employer Benefits:
  – Access to expanded talent pool (versus your narrow geographical area)
  – Lower turnover
    • Less turnover due to employee geographical relocations.
    • Several studies show turnover is actually decreased with a remote workforce
Why Remote Employees?

• Employee Benefits:
  – No commutes
  – Increases flexibility
    • Allows employees to manage family situations more easily for example getting kids to school, sports etc.
    • Allows employees flexibility to manage non-work interests
  – Less expensive for employees (no dress code or vehicle costs)
  – Many employees love it.
Technology Requirements

• Robust IT structure
  – DWC
    • Works with an outside IT consulting firm
  – Summit
    • Outsources to an outside IT firm who provides infrastructure and managed support.
  – Pinnacle
    • Shares an IT team of 5 full time employees with parent CPA firm

• High Speed Internet
  – All remote employees must have high speed internet.
  – Decision to make: Do you pay for it?
Technology Requirements

• Paperless office
  – You must have a fully paperless office with archival and retrieval capabilities.

• Phone System
  – VoIP phone system
  – Challenging with a large remote staff.
  – Integrated screen sharing, conference calling, IM
Technology Requirements

- Various opinions on remote desktop arrangements:
  - DWC
    - All software is the same.
  - Summit
    - Everyone must work the same way regardless of in-office or remote location.
  - Pinnacle
    - If it is more efficient for our in-office folks to not work on remote desktop, they are not required to do so
Technology Requirements

• Hardware
  – Summit
    • IT staff sets up and sends hardware to remote employees.
    • Protocols in place to track hardware inventory and have returned if employee leaves.
  – DWC
    • Bring your own device model - hardware belongs to the employees.
  – Pinnacle
    • IT staff sets up and sends hardware to remote employees.
    • Employees sign equipment agreements so there are clear processes in place to track hardware inventory and have returned if employee leaves.
Technology Requirements

• **Workflow Software**
  – **DWC**
    • Cloud-based workflow system to track deliverables, deadlines, workloads, etc.
  – **Summit**
    • Uses Microsoft Office task manager to manage workflow.
  – **Pinnacle**
    • Cloud-based workflow system to track deliverables, deadlines, workloads, etc.
Server Considerations

• Where are servers housed?
  – On site or in the cloud?

• What happens if server site is compromised?
  – Establish back up systems.
  – How fast can you be up and running if your server site is destroyed in a disaster?
  – What is the worst that can happen and how are you equipped to handle that?
Security

• DWC
  – Access through VPN
  – Two-factor authentication and complex passwords
  – Screen saver with password lock
  – Ransomware triggers embedded in all drives
  – Employees are subject to confidentiality clauses
  – No information can be stored locally
  – All reports have SSNs masked
Security

- **Summit**
  - Nothing can ever be saved on a remote computer
  - All information must be always on main server.
  - “Thin client” computers to force this.
  - Shredders at all remote locations so anything printed out is shredded.
Security

• Pinnacle
  – Procedures are the same for all staff members, regardless of location.
  – Shares a full-time cyber security IT professional who works on securing the network from attacks and breaches.
  – Any information downloads above a certain size and/or at a frequent level are monitored.
  – All employees are subject to confidentiality clauses.
  – All remote employees have a shredder.
A Physical Office

• Potential Advantages:
  – Training – Easier to train new employees
  – Culture – Easier to maintain a company culture?
  – Collaboration – Does it facilitate team work?
  – Management – Easier for managers to more clearly monitor productivity and performance?
    • If yes, how?
    • If no, why not?

• Are these myths?
No Physical Office At All

• Would you lose any of the “so-called” advantages with a fully remote office a la DWC? How do you maintain cohesion?
  – Frequent meetings via web software
  – No differentiation between in office and remote employees
Employer Challenges/Considerations

- **EE compensation:**
  - Depending on firm philosophy, pay may or may not be affected by geographic considerations. This can hurt or can help.

- **More competition for talent:**
  - Every employee of yours can be hired by every other TPA with remote capacity. This forces you to keep your staff happy.

- **No local contact:**
  - Do clients care that their consultant/administrator is not local?
  - Do you care if you have only virtual contact with your employees?

- **Training**
  - Discussed later, more difficult to train remotely.
Is Remote For All Firms?

• No
  – If you don’t have the technology in place, no.
  – You need to have trust in your employees. If you don’t, no.
  – You need to have a culture that embraces change and technology. If you don’t, no.
Is Remote For All Employees?

• No
  – Clearly some people can’t work outside an office.
  – Sometimes they only know once they have tried it.
  – Some employees cannot handle the distractions.
  – Some employees cannot ‘turn it off’.
**Hiring**

- How do you manage a hiring process remotely?
  - Initial phone call (all three firms)
  - Skype interview (all three firms)
  - Web tools for testing (DWC)
  - Show writing skills (Summit)
  - Personality assessments (Pinnacle and DWC)
  - No in-person interviews (Summit and DWC)
  - In-person final interviews (Pinnacle)
Training

• All agree, it is more difficult to train people who are remote, but it can be managed.
  – DWC
    • All training is done by Skype
Training

• All agree, it is more difficult to train people who are remote, but it can be managed.

  – Summit

  • Entry level staff must spend their first year in the Eugene office for training.

  • Experienced hires spend 2 weeks for orientation in Eugene then go fully remote.
Training

• All agree, it is more difficult to train people who are remote, but it can be managed.

  – Pinnacle
    • No entry level staff are completely remote.
    • New experienced hires spend 1-2 weeks for orientation in Arizona then go fully remote.
      – New employees return to the office quarterly (in year one for a week each time) and then come to AZ 1-2 times per year.
    • Much training is done via screen sharing/virtual conferencing.
    • Remote employees participate in in-house trainings via Skype.
Questions?