

REMOTE DOESN'T HAVE TO MEAN DISCONNECTED

Mary M. Belka

CPCU, ARM, ARe, RPLU, CIC, CPIW
Eisenhart Consulting Group, Inc.

503-866-5704

mmeisen@eisenhartconsulting.com

Nebraska Big I Spring Conference March 20-21, 2024

Lessons from the COVID-19 Pandemic Playbook

- Agencies can function & continue to serve clients, regardless of employees' physical locations.
- It's not new – remember telecommuting?
- Situational v. permanent
- “All the way” v. hybrid
- “Remote” isn't really the point – existing vulnerabilities have been exposed
 - ✓ Operations management void
 - ✓ Wisdom is leaving at a fast pace
 - ✓ Lack of training – 20-25 years
 - ✓ Lack of education when it is needed the most
 - ✓ Lack of structure
 - ✓ Lack of focus – transactional v. risk management-based approach
 - ✓ Lack of new business production
 - ✓ Supply chain pressures
 - ✓ Remarketing – please don't!
- Trends
 - ✓ Back to office
 - ✓ Efficiency studies – operations management void
- Fast forward to the “new normal”

Advantages to Employee and Employer

- No lost time spent commuting to and from the agency's location
- Reduced work-related costs usually absorbed by the employee, including fuel, vehicle maintenance, clothing, and eating out
- Increased work schedule flexibility – hours may be adjusted to accommodate both employee and client need
- Increased economic opportunity regardless of geographic location, eliminating the need to relocate to earn more
- Some employees prefer to work alone, feeling that they can accomplish more without the interruptions associated with working alongside others.

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Economic Benefits to Agency

- Less office space needed (for those able to renegotiate leases and rental agreements)
- Lower utility bills and fewer general office expenses
- Increased opportunity to hire qualified staff without being limited to a particular geographic area.

What About Culture?

- How is it created?
 - ✓ Leadership – It starts at the top!
 - ✓ Shared values
 - ✓ Shared experiences
 - ✓ Family and/or community-based components
 - ✓ Language, norms, and customs
- Diversity
- Multiple locations
 - ✓ Same challenges apply when purchasing or merging with new organizations
 - ✓ Employees who've never met – but who are on the same team
 - ✓ Cross-location handling of entire book of business
 - ✓ Remote sales offices/personnel – home office servicing
 - ✓ Bridging geographic divides to create true teams
 - ✓ Specific, regular interaction
 - ✓ Project collaboration
 - ✓ Primary/next available phone call handling across locations (GoTo™)
 - ✓ Teams™ v. simply calling/e-mailing/ - part of the new normal – very conducive to building teams across time zones
 - ✓ On camera, engaged, and actively participating – no multi-tasking – and please wear pants!
 - ✓ EOS™ approach – accountability and celebrating wins

Critical Components

- Leadership – can't say enough about it
- Strategy, including alignment of target client, sales goals, service standards, and carrier partnerships
- Business model – remote is just a place
- Staffing
- Invariable use of tech stack
- Invariable – and non-negotiable procedures
- Education & training

Education & Training Experience – The Road to Qualified Staff

- Intentional & carefully planned/executed
- Onboarding
- Structure
- Educational career path
- CaughtUP© - the secret sauce
- Educational career path - examples
- Straight-up learning curve
- Generational challenges
- Accidental/absorption learning
- FAQ-based approach

Shifting Opportunities for Growth and Development

- Out of sight, out of mind – growing trend affecting professional development
- Impromptu opportunities to connect team members

Possible Burnout & EEOC Challenges

- Employee temptation to “keep working” off the clock – and employer temptation to allow/ignore it
- Continued misunderstanding of “salary” v. non-exempt v. exempt employee status
- Work/life balance

Sharing the Load

- Workload allocation across locations
- Receptionist duties – phone/retrieval/scanning mail
- Primary – next available call center approach across locations
- Please – no assistants/techs
- Outsourcing is not “remote” – it’s outsourcing

Remote Tech Considerations

- Best of class outsourced IT partnership
- Dedicated computer – no other use
- Appropriate Internet access/speed
- Same set-up as office
 - ✓ Multiple monitors, etc.
 - ✓ Access to all software
 - ✓ GoTo© phones
- Agency Management System (AMS)
 - ✓ Secure connectivity

- ✓ Mobile app accessibility
- Client confidentiality
- Cyber security considerations – RoboForm™ for log-ins, etc.

The Road Ahead

- Leadership – It all starts at the top
- Myriad remote work combinations – one size does not fit all.
- Hybrid is the trend
 - ✓ Remote operations management with quarterly in-office visits and daily contact via MS Teams™, e-mail, text, and phone
 - ✓ Remote CEOs working Tuesday-Thursday in the office
 - ✓ Account managers working remotely 2-3 days per week
 - ✓ Weekly in office minimums
 - ✓ Periodic situational remote work due to transportation, weather, health, or other issues
- Combinations that include outsourced accounting, HR, and IT

Summary

Each agency has to find its way – as always, intentional planning and implementation yield optimum results. Nothing beats in-person relationships; but it is possible to create positive results through understanding and addressing the very real challenges of remote work.