

Managing Remote Employees

From a Manager's Perspective

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Agenda

- Hiring
- Developing
- Managing
- Key Themes and Takeaways



Hiring Remote Employees

Benefits of Remote Employees

- Cost Effective
- Balanced Workloads
- Expanding The Company Footprint
- Knowledge of The Area
- Accessibility to Meet Needs of Customers



Hiring Remote Employees

Resume Evaluations

Keywords

Education Level

Experience Level in Auditing

Work History / Work Gaps



Hiring Remote Employees

Interview Evaluations

First Impressions

Engaged and Interactive

Cultural Fit For Both Parties

Reviewed Our Web Site

Resume Versus Interview

Can I Manage This Person?



Developing Remote Employees

Office Training

Policies Manual

Teaching Premium Audit

Scheduled In-Office Training / Online Training

Time Sheet Reporting



Developing Remote Employees

Field Training

Establishing a Clear Daily Routine

Riding With The Auditor

Organization And Efficiency

Setting Goals

Tracking Progress



Managing Remote Employees

Follow Up Training

Shadowing The Auditor in The Field

Holding The Auditor Accountable

Teaching Through Review

Building a File

Optimization

Involving The Auditor in The Decision-Making Process

Don't Look Away



Managing Remote Employees

New Employees

Teaching Company Procedures on Auditing

Spending The Time Upfront to Save Time Later

Transitioning Responsibility to The Auditor

Weekly Follow-Up

- Looking at The Auditor's Calendar and Compare
- Discussing Progress Reports
- Going Over Outstanding Audits
- Providing Guidance For Difficult Audits
- Evaluating Production Weekly



Managing Remote Employees

Experienced Employees

Open Lines of Communication

Tracking Production Standard

Partnership Mentality

Providing Guidance And Expertise

- Territory Alignment (Due to Workflow)
- Online Programs / Workflows
- Assisting With a Difficult Audit, Insured, or Agent



Managing Remote Employees

Best Practices

Communication (Empathetic, Genuine, Available)

One Size Does Not Fit All

Following Policy Procedures

Measuring Weekly Production

Maintaining Accountability

Motivation and Support



Managing Remote Employees

Warning Signs (Red Flags)

Lack of Communication (All Forms)

Increase in Delinquency

Decrease in Audit Quality

Failure to Respond Timely

Increased Office Time

Lack of Progress Notes



Managing Remote Employees

SMART Goals

Specific

- Trainee Versus Experienced Auditor

Measurable

- Weekly Trainee Forms, Weekly Production

Attainable

- Is This Attainable or Achievable For The Auditor

Realistic

- Is The Goal Realistic

Time Bound

- Setting Deadlines



Key Themes and Takeaways

- Communication is Key
- Lead by Example
- Be Firm But Fair
- The Auditor's / Trainee's Perspective
- Levels of Completion
- Continuous Improvement
- Remember It's Business.....Not Personal



