

# Managing Remote Employees

From a Manager's Perspective

Shawn Powers

Wilkinson Insurance Services, Inc



# 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





 **Wilkinson**  
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