

PEEO INNOVATION

PUBLISHED BY THE NATIONAL ASSOCIATION OF
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THIS MONTH'S FOCUS

WORKFORCE

EMPLOYEE EXPERIENCE

TALENT WOES

OFFICE CULTURE

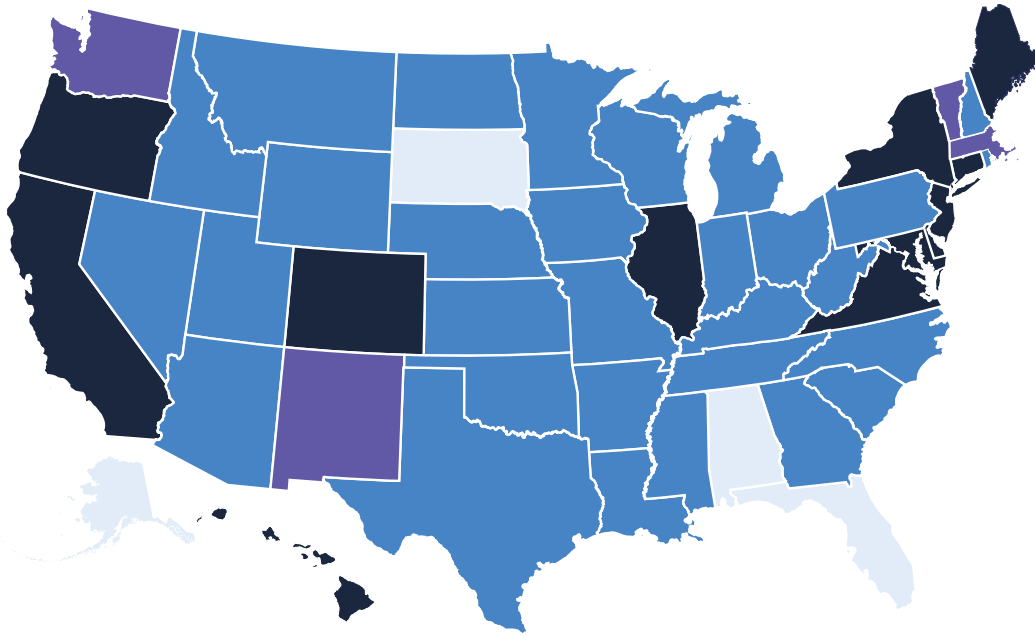
COVER STORY

THE QUESTCO STORY

TREASURE WHAT IS THERE,
BUILD SOMETHING BRIGHTER

Questco COO Brandon Hartsaw, CFO Wendy Katz, CEO Jason Randall

State Mandated Retirement Plans for Small Businesses



Source: Georgetown University for Retirement Initiatives

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► **Brandon Hartsaw, Wendy Katz, and Jason Randall**

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STAFF

PUBLISHER

NAPEO

CEO/PRESIDENT

Patrick J. Cleary

EDITOR

Chris Chaney

LEGAL EDITOR

Nicholas P. Kapiotis, Esq.

DIRECTOR OF MEMBERSHIP DEVELOPMENT

Nancy Benoudiz
703/739-8169
nbenoudiz@napeo.org

DESIGN

Yes&

PEO Insider® (USPS 024-492)(ISSN 1520-894X) is published monthly except June/July and December/January, which are combined, by the National Association of Professional Employer Organizations, 707 North Saint Asaph Street, Alexandria, VA 22314-1911. \$150 of each member's dues goes towards his/her annual subscription to *PEO Insider*®. The annual subscription rate for non-members is \$150. Periodicals Postage paid at Alexandria, Virginia, and additional mailing offices. POSTMASTER: Send address changes to *PEO Insider*®, 707 North Saint Asaph Street, Alexandria, VA 22314-1911.

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IN A BLINK OF AN EYE

BY KRISTEN J. APPLEMAN

Over the past few months, a day has not gone by without receiving an email, news alert, article highlight thread, or a discussion surrounding AI, notably ChatGPT/Bing/Bard, and the impact on our future. It is a topic that seems to have come out of nowhere. Yet, it has been around for a while, waiting in the wings to be unleashed into the public arena. Associates in my organization have a question that continues to be raised: how will this impact our business? My job? My career? If you have not asked yourself this very question, I encourage you to do some homework ASAP. While there is not a specific date PEOs started, we know predecessors to the modern-day PEO began in the 1970s. Look how far our industry has come! We have withstood economic ups and downs, regulatory threats, and even a global pandemic. As the phrase goes, “what doesn’t kill us makes us stronger.” So, what does this recent advancement mean to our future?

These advancements in AI have taken the world by storm. I remember watching the movie Terminator and thinking to myself how out of this world it felt to have a future run by machines. Well...here we are! I have a co-worker with whom I had a rich conversation debating how will this change our future in human resources and

the workplaces we support as PEOs. There is a lot I do not know about how this all may unfold. Technological advancements have moved us ahead at warp-speed compared to earlier decades. Not only does the newest generation of workers exhibit a level of tech proficiency we haven’t seen before, but it has also been matched with their personal needs and expectations they have of society, of their employers, and the world around them.

While there is not a magic answer to what the PEO industry must do, what is certain to me is that we focus in on serving the SMBs we have the privilege of supporting each and every day. As PEO leaders, we can embrace this technology to better serve our clients and their businesses. We have already spoken for years about the power of data in workforce management. Further, each business is unique, as each human being has unique needs, and as such the personalized experiences we provide set the good apart from the great. Innovation will not slow down. There is not a pause or slow-motion button on this remote control. With these advancements, new and emerging needs in the workplace will also materialize.

I hate to admit, as it makes me feel a bit aged, but I had my first Blackberry back in 2003. I thought it was incredibly awesome



As PEO leaders, we can embrace this technology to better serve our clients and their businesses... Innovation will not slow down. There is not a pause or slow-motion button on this remote control.

to be able to answer clients much faster than waiting to get back to an office. Wow! How much has changed. Now our clients want an answer in minutes, to be able to get help anywhere at anytime of the day. Think about how PEOs have evolved since then. Everything was paper-based and now the thought of only having paper might make our heads spin.

What has felt like a *blink of an eye*, how we do business, the expectations of our clients and of their employees have changed radically. Do me a favor, if you have not checked out ChatGPT, Bard or other AI-infused technologies – dive in to learn! You might feel what it can do is frightening *and fascinating* all at the same time! My son, David, took a speech class this summer and analyzed a TedTalk for one of his assignments. He chose one that centered on AI and the impact it will have on societal and democratic shifts. I’m amazed all the tentacles this emerging technology will have on our lives. Buckle up, let’s enjoy the journey ahead! ■



KRISTEN J. APPLEMAN

2022-2023 NAPEO Chair
SVP/GM
ADP TotalSource
Alpharetta, GA

CONGRATS

TRINET WINS 8 TELLY AWARDS

NAPEO member TriNet recently announced it has received eight prestigious Telly awards, including three golds, for its *People Matter* campaign. “We are incredibly honored to be recognized with these eight prestigious awards for our latest *People Matter* campaign, including our first golds,” said Michael Mendenhall, senior vice president, chief marketing officer, and chief communications officer of TriNet. “We strive to highlight the human side of SMBs and share their amazing and untold stories. It is with great pride that I share the recognition with my TriNet colleagues, customers, and extended creative collaboration teams,” he continued.

LISTEN

NEW EPISODES OF PEOPLE PAT MEETS PODCAST OUT NOW

New episodes of NAPEO’s first-ever podcast, *People Pat Meets*, have been released all summer! You can listen to *People Pat Meets* everywhere you listen to podcasts or scan the QR code below to listen on Spotify. After over a decade in the PEO industry, Pat Cleary has met a lot of people—the industry’s founders, absolute newcomers, and everyone in between. Now, he’d like you to meet them, too! Join NAPEO’s CEO each week as he sits down with some of the many friends he’s made during his tenure. Laugh with him as he explores each guest’s journey through the PEO industry, their hidden talents, and more! Take a listen to hear from your peers and industry leaders about their unique career journeys.



POWER OF MANY

2023 NAPEO GIVES BACK PARTNER: GIVE KIDS THE WORLD

NAPEO Gives Back has chosen to “Illuminate Hope” and light up the lives of the incredible children at Give Kids the World Village (www.gktw.org) with our fundraising efforts before and during NAPEO’s 2023 Annual Conference & Marketplace in Orlando. Give Kids the World Village is an extraordinary 85-acre resort in Central Florida that offers magical experiences to children with critical illnesses and their families, providing them with hope, joy, and unforgettable memories while they are experiencing a wish come true.



Our goal is to deliver the enchantment and wonder of Christmas year-round at Give Kids the World Village. We believe that every child deserves the opportunity to experience the magic of the holiday season, regardless of the time of year. By installing a campus-wide array of dynamic and festive Christmas lights throughout the village, we aim to create a captivating atmosphere that will bring joy and happiness to these young heroes and their families—all year round. To achieve this ambitious vision, we kindly ask for your generous support and contribution to this year’s NAPEO Gives Back initiative. Your financial donation will go directly towards purchasing the necessary lighting equipment, upgrades, and installation costs. With your help, we can make spirits bright and create a truly magical environment for the children at Give Kids the World Village. For more information please contact Connie Samuels (csamuels@napeo.org) or Amy Gabmill (agabmill@napeo.org).

There are several ways you can support the NAPEO Gives Back fundraising efforts:

1. **Make a donation:** Your generous donation, no matter the size, will have a direct impact on the lives of these extraordinary children and their families.
2. **Purchase an NGB Corporate Banner:** Align your company support with the NAPEO Gives Back initiative banner featured in the main conference hall (\$2,000).
3. **Donate an Auction Item:** We are looking for donated goods and services that we can feature in a small but tasteful silent and live auction.

MOST WORKERS SAY REMOTE WORK BEST FOR MENTAL HEALTH

According to FlexJobs' 2023 Work Insights Survey, 96% of workers believe a remote or hybrid work arrangement would be best for their mental health.

A hybrid workplace was reported as the ideal for 49% of workers, slightly outpacing a preference for a fully remote arrangement (47%). Only 4% thought being in an office full-time was best for their mental health.

The new survey also revealed:

- Decreased stress levels was the top reported health benefit from remote work
- Of those who commute, 87% say it impacts their stress levels to some degree
- 79% of people think that employers should be required by law to include salary in job postings
- 1 in 5 (20%) said they refuse to apply to jobs when the salary isn't listed
- 44% say they are more optimistic about their career prospects today compared to this time last year
- Men are more likely to think collaboration suffers in a remote environment, with 41% claiming the negative impact vs 34% of women who say the same

Integration of Two Industry Leaders to Provide PEOs Elite Retirement Solutions

Ameritas, a main street market leader in retirement plans, acquired BlueStar Retirement Services, LLC and now provides PEOs access to a full range of custom-tailored retirement plans, outsourcing services, and fiduciary management programs that seamlessly integrate with benefit administration and HRIS systems.

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QUICK HITS

BACK TO THE OFFICE

NAPEO SURVEY SHOWS ALMOST 70% OF PEO EMPLOYEES BACK IN THE OFFICE

The results of NAPEO's survey on office requirements for internal PEO employees are in. Here are the findings:

- Some 40% of PEOs have a structured hybrid arrangement for their internal employees, meaning they are required to be in the office a certain number of days, or on certain days.
- Nearly 28% percent require internal employees to be fully in the office. A
- About 16% leave it up to employees to decide.
- Just over 8% of PEOs are fully remote, and the same percentage is still deciding.

Participating PEOs represented all regions of the country, with the biggest concentration in the Southeast (24%), followed by the Midwest (18%), Southwest (18%), and West (16%). The majority of respondents have 50 employees or less (68%). Contact Kerry Marshall (kmarshall@napeo.org) NAPEO's vice president of marketing & communications, with any questions.

EXPANSION NEWS

G&A PARTNERS EXPANDS INTO OREGON

NAPEO member G&A Partners recently announced that it is expanding to serve small and mid-size businesses in Oregon. "G&A Partners' purpose is to help build thriving businesses and make a difference in the lives of those we serve," said John G. Allen, chief revenue officer at G&A Partners, in a release announcing the news. "We believe we can help Oregon companies grow their businesses better and faster by offering comprehensive HR solutions with transparent pricing and customized services. Using our affordable benefits plans and state-of-the-art technology, Oregon businesses can compete with larger companies to attract and retain top talent and grow market share."

EMPLOYEE DEMANDS

WORKERS SEARCHING AND EXPECTING EXPANDED BENEFITS

As employers continue dealing with lingering effects of persistent worker shortages, offering new and expansive employee benefits has become common.

Desperate to attract workers and retain top talent, employers have expressed an increased willingness to offer more than a paycheck. Workers have felt this increased power and have come to expect greater benefits. Research firm Lensa analyzed Google search data to explore which benefits and workplace attributes workers now look for in an employer. Here are the ten employee benefits and attributes that saw the greatest uptick in search traffic from last year.

1. Menopause leave
2. Mental health support
3. 4-day workweek
4. Office socials
5. Faster hiring process
6. Workplace boundaries
7. Modern office technology
8. Sustainable workplace practices
9. Pet friendly offices
10. Ergonomic office furniture ■

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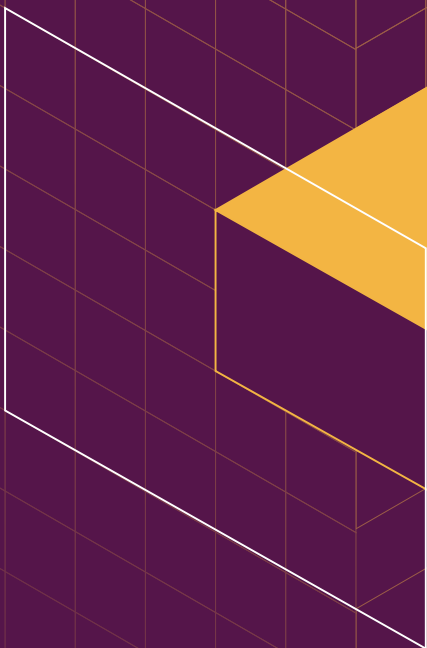
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EMPLOYEE EXPERIENCE





UPSKILLING: A WIN-WIN BUSINESS PROPOSITION

BY REE HARPER, ESQ.



As Richard Branson, founder of the Virgin Group, once observed, “every success story is a tale of constant adaptation, revision and change.”

The certainty of change is more visibly demonstrated in the workplace of today than ever before. Where else would you find the collision of so many distinct forces (evolving cultural issues, technological innovation, the onslaught of new laws and regulations, a global pandemic, just to name a few) driving change within a single environment? The willingness of an organization to adapt has become less of an option than an obligation to shore up its continued viability. Consequently, the ability of the organization’s employees to also adapt cannot be presumed, and often upskilling is the solution to bridging any skillset gaps.

Upskilling is generally accepted to mean an expansion of, or adding to, an employee’s skillset. Upskilling differs from the training provided to an employee to enable him or her to perform the specific duties of the position he or she fills. On the contrary, upskilling takes the employee beyond the boundaries of the existing job description. The term, however, is a bit of a misnomer in that the “up” implies a current, inferior level of ability. In fact, the new skills to be acquired may often be attained through training alone, rather than requiring a higher level of intellect or advanced education.

From both an organizational standpoint and that of the individual employee, the goals for and results from upskilling may be

quite varied. Employers reap such benefits as employee retention, increased productivity, eliminating unnecessary costs, developing succession plans, business continuity and improved employee morale and engagement. Simultaneously, the employee develops skills needed in today’s competitive work environment, learns ways to reduce stress caused by inefficiencies, and becomes equipped to seek new opportunities within the organization while boosting personal and professional confidence.

The methods of upskilling have changed as much over time as the need for it. In the 1990s, I recall my law firm/employer offering a month-long plan for training 200 plus attorneys and their staff to use a new word processing platform, complete with transportation by bus to and from the training facility. In 2023, in-person, classroom-style training sessions are an endangered species. Virtual training options, such as webinars and web-based libraries, offer convenience and cost savings that make upskilling opportunities available at the click of a button.

For an organization vetting the idea of initiating an upskilling program, there are several questions to be answered in advance of its introduction to employees. Otherwise, the best of intentions may be overshadowed by confusion and unmet expectations. First and foremost, the organization should define the purpose for the program, which could be one or more of the following:

- Adoption of a new, company-wide operational platform (e.g., law firm adopting a new word processing program),
- Adhering to compliance obligations (e.g., sexual harassment and safety training),
- Developing new skills to improve efficiencies (e.g., using a postage machine instead of stamps),
- Creating a library of standard operating procedures (e.g., an instructional video for submitting expense reports),
- Providing employees access to required and/or optional training materials (e.g., understanding the employee code of conduct and guides for better customer service)
- Establishing departmental content for growth tracks (tiered positions with defined skill levels)
- Cross training (creating back up and contingency plans for business continuity).

This is by no means an exhaustive list. When the goals of the program have been clearly defined, the preferred results become achievable, regardless of the content or format chosen. Great care and effort must then be devoted to identifying employee concerns and avoiding miscommunication. Because employees, employee populations, and company culture as a whole are unique for every organization,

For an organization vetting the idea of initiating an upskilling program, there are several questions to be answered in advance of its introduction to employees. Otherwise, the best of intentions may be overshadowed by confusion and unmet expectations.

anticipating every potential bump in the road is not likely. When goals are clear, however, the task becomes less daunting. Employees may raise concerns that are unique to the individual, and groups of employees may collaborate to ask questions that affect their department or function. There are questions, though, that can be expected within any organization:

- When does the training have to be completed?
- Is the training optional? If so, can the employee choose what training content to pursue?
- Will time be made available during the workday to focus on training?
- Will completed training increase the employee's pay?
- Will completed training make the employee eligible for promotion?
- If training is not completed, are there consequences?

Some of these questions cannot be answered until the upskilling program itself has been adopted. The content and format may be determined by first conducting a skills audit, but that often proves to be a misstep. Surveying available skills fails to uncover what the organization is lacking, i.e., unavailable skills. So,

while a skills audit serves as a critical part of the discovery process, its value is limited if not considered alongside an audit of job functions. For example, Anna, a staff accountant, may have the ability to reconcile journal entries. But, the fact that it takes Anna twice the time necessary to conduct those reconciliations because she has limited experience with Microsoft Excel, will only be revealed by taking a much deeper dive into her assigned responsibilities to understand her daily activities and identify the time suckers. Only then can a complete picture be formed of the current skillset, preferred proficiencies, and the upskilling needed to bridge the two.

Finally, organizations must realize that regardless of the purpose, goals or selected method of training, the biggest challenge to overcome is the fear that employees will get "so good" that they leave for a better opportunity. Research proves otherwise. Nurturing a culture of learning and self-improvement creates employee loyalty married with employee satisfaction. The 2021 LinkedIn Workplace Learning Report revealed that 94% of employees indicated they would stay with a company longer if the company invested in their learning and development. A similar

Association for Talent Development study found that companies offering a comprehensive training program have a higher employee retention rate of 72% compared with less comprehensive programs (57%).


Fundamentally, upskilling is an investment in the organization's greatest assets, its people. The American Society for Training and Development has reported that organizations investing \$1500 or more per employee per year on training have a 24% higher profit margin and a 218% higher income per employee than those that invest less. The skill to be learned here is that investing in employees through a concerted effort, due diligence, and buy in from the top down, creates a win/win business proposition. ■



REE HARPER, ESQ.

VP of Human Resources,
General Counsel
Lyons HR
Gadsden, AL



The letters 'PROS' are rendered in a bold, 3D, sans-serif font. The letters are primarily a dark purple color with a yellow-to-orange gradient on their top and side surfaces. The background is a yellow grid pattern that recedes into the distance, creating a sense of depth. The 'P' is at the top, 'R' is to its right, 'O' is below 'P', and 'S' is to the right of 'O'.

PROS

**HOW PEOS ARE HELPING SMBs MEET
MARKET DISRUPTORS HEAD ON**
BY DAVID PEARSON

T

he modern world is driven by convenience and customization,

SMBs included. Digitization, remote-friendly roles, and a generational shift in the workforce all impact today's employee experience. When this experience is lacking, it can be costly to companies in more ways than one.

The candidate-led job market continues to be highly competitive, increasing the pressure put on recruitment. And the U.S. spends an estimated one trillion dollars every year in turnover expenses due to employees leaving in search of new opportunities. However, much of this can be avoided when the employee experience is prioritized. Which is why many are calling on PEOs for assistance.

By definition, market disruptors demand attention, and SMB leaders must be open to (customizing) change to avoid being left behind. As a result, businesses have leaned on PEOs more heavily in recent years for their guidance and expertise. PEOs have the knowledge,

resources, and time to focus exclusively on HR services and trends, allowing SMBs to keep pace with industry changes without sacrificing personalized attention.

Below are four market disruptors impacting the employee experience and how a PEO can help.

1. Shift to hybrid work environments

SMBs have advanced past the “new norm” by adopting work policies to appease current demands. Remote work has revolutionized the industry with nearly 30% of employees working from home, which represents six times the rate in 2019. Most companies have settled on a hybrid work environment to create opportunities for both in-house and remote workers.

However, there may be potential bias toward remote employees due to an “out of sight, out of mind” mentality. Yet, employees across the board value a similar sense of belonging and a clear path toward career advancement. Therefore, it's up to HR to provide consistency and establish workplace equity, regardless of location.

2. Managing a multi-generational workplace

For the first time ever, there are five generations in the workforce. This makes it essential to personalize the employee experience so it can cater to all groups. Employees will rank certain benefits and accommodations differently. HR leaders must determine what is most impactful and inclusive. By tailoring solutions based on the workforce population, a PEO can help SMBs stay flexible and adjust as their demographic changes.

This adaptability is also important when navigating the preferred work styles of a multi-generational workplace. In general, the older generation has adapted to a structured 9-5, in-office schedule. Whereas, the younger generation appreciates more flexibility and are quicker to adapt to remote technologies. These differences affect how employees collaborate, how they advance, and how they value benefits, thereby affecting what employers must do to keep everyone happy.

By definition, market disruptors demand attention, and SMB leaders must be open to (customizing) change to avoid being left behind. As a result, businesses have leaned on PEOs more heavily in recent years for their guidance and expertise.

3. Alleviating spike in employee burnout

Employee burnout and the subsequent rise in voluntary resignations have caused major waves over the past few years. When burnout occurs, productivity decreases, turnover rates increase, and overall workplace satisfaction dwindles. And, unfortunately, it's not only employees who are burnt out. SMB leaders and HR departments are also feeling the effects and scrambling to stay afloat.

It's no surprise an increasing number of companies are leveraging PEOs to meet employee demands head-on. Since 2018, the awareness and integration of PEOs have risen 44%. By delegating the full-time attention HR requires, SMBs can prioritize employee satisfaction while still driving business growth.

4. Authentically incorporating DEI policies

DEI programs are no longer a nice-to-have option, they've become part of the fabric of an organization. Although, employees can spot inauthenticity in DEI programs designed to "check a box," which means SMBs need to be thoughtful and sincere with their approach.

However, it seems DEI has taken a back seat because of other HR challenges popping up. Quiet quitting shifted attention to retention. Then, inflation hit, and reallocations of funds intended for DEI programs were used elsewhere. Despite the temporary reprioritizations, DEI remains significant for employees, and PEOs can provide guidance to help SMBs more equally distribute their efforts.

TAKING MEANINGFUL, MEASURABLE ACTION

With these disruptors affecting the market, SMBs want to know what can

be done to support the demand and how to know if it's making a difference. They rely on their PEO partnerships for the technology, strategy, and metrics which can clearly outline their most optimal next steps.

Track employee KPIs

Implementing KPIs, such as employee engagement scores and job performance competencies, show employees what they're working toward, how they're being evaluated, and why. This is valuable as research shows 70% of employees say their job largely defines their sense of purpose. Tracking employee KPIs also allows business leaders to gauge employee satisfaction and identify areas for improvement.

Provide consistent communication

Upholding clear, consistent communication reduces misunderstandings. It also allows employees to feel comfortable speaking up about their challenges, as well as feel confident offering solutions. It's beneficial to provide multiple modes of communication, since some employees prefer one-on-one meetings while others like the option of sharing ideas with a larger group. Maintaining a constant feedback loop keeps employees engaged and part of the process where they feel their needs are being met.

Update compensation and benefits

There's a constant need to evaluate what benefits are offered to ensure competitiveness. With costs increasing every year, benefits must deliver what employees actually want and SMBs are often left wondering what to take away and what to add. Customizing benefits is becoming harder to manage and more difficult for SMBs to balance

societal needs with what they can realistically provide.

SMBs depend on PEOs to contribute a high-level of expertise, knowledge, and service, as well as access to cost-effective, premium benefits to stay competitive with larger companies. Despite the changes in the type of benefits employees want, the value of a comprehensive compensation plan continues to add to the overall employee experience.

Offer training and development

Employees want to see an employer's investment in their career growth through more training and development resources. Despite the short 24- to 36-month employee lifecycle, employers must focus on what's in it for the employee. Any skill enhancement is a reflection of the company, and engaged employees deliver better service. Plus, it leaves the door open for boomerang employees, improves employee feedback on social media, and attributes to a positive offboarding experience.

The workforce is in a different place than what it was even a year ago, which makes curating a positive employee experience a continued priority. Rather than implement a catch-all solution with regards to benefits or professional development, SMBs need to share their specific needs, challenges, and demands with their PEO. Addressing issues sitting below the surface allow PEOs to guide businesses in the direction which best fits them versus relying only on what works for other companies. ■



DAVID PEARSON

ExtensisHR
SVP of People and Culture
Woodbridge, NJ

IT'S ALL ABOUT THE TALENT

UNDERSTANDING THE SHIFTING LANDSCAPE OF TALENT ACQUISITION AND RETENTION

BY HEATHER KEEFER SAULSBURY





First and foremost, PEOs must put themselves in the shoes of employers while recognizing the high expectations that today's talent brings to their job searches and positions. Only then can you position yourself to advocate for both ends of the spectrum.

PEO leaders are tasked with guiding clients through their most pressing business operations challenges, and that includes employer talent acquisition and retention, especially in our current climate. These challenges are top of mind for most businesses today as the job landscape has changed drastically and faced significant ups and downs over the last few years. PEOs also have to stay on top of these shifts for their own client retention considerations.

A tense job market has meant increasing demands from talent that doesn't necessarily want to be more productive to get their demands. They're seeking everything from wellness perks to growth opportunities to hybrid work arrangements, and the shift has led to changes in organizational performance. The traditional in-person, nine-to-five office structure has changed for many employers, and they've had to keep productivity high by getting creative. Companies now have to expertly balance compensation and benefits with daily performance needs and business targets. This is no easy task.

So, as a PEO leader or broker, how can you better support these employers? The actionable strategies that follow provide a starting point to guide employers struggling with talent acquisition and retention.

ALIGNING EXPECTATIONS AND PERFORMANCE: ADDRESSING TALENT DEMANDS

First and foremost, PEOs must put themselves in the shoes of employers

while recognizing the high expectations that today's talent brings to their job searches and positions. Only then can you position yourself to advocate for both ends of the spectrum.

Emphasize the importance of communication. Employers will never know what their employees – prospective or current – really want unless they talk to them. And employees may never fully understand policies and work expectations without understanding the “why” behind them. Help employers establish new avenues for gathering feedback and meeting with people in open settings. Employers should be prioritizing transparency and letting that priority be known to their workforce.

Help employers set clear performance goals that link up with expectations for their employees. A few strategies for doing so include:

- Integrating a performance-based compensation model, wherein top-performing employees are rewarded
- Recognizing and rewarding positive behaviors, like great attendance or showing initiative on a project
- Emphasizing company values across departments, meetings, policies and decisions
- Explaining the details of what's behind a company practice or policy change

Trying out a new strategy like performance-based compensation can be a win-win since employees are rewarded for great performances which in turn leads to higher motivation and a sense of purpose

and accomplishment. The company benefits from better overall performance.

NAVIGATING THE HYBRID WORKFORCE: EMBRACING FLEXIBILITY WHILE MAINTAINING PRODUCTIVITY

Employees want flexibility today more than ever. This flexibility could look different ways, from working non-standard hours to being remote to getting more personal days. The hybrid work model allows workers to come into the office occasionally or on a part-time basis, and the rest of the time they can tune in virtually. Gallup research found that about 53% of employees expect a hybrid arrangement at work while 24% expect to work remotely full-time.

Employees benefit from remote and hybrid work models because of factors like time and money savings on a commute and better work-life balance. Employers benefit because they can attract top talent looking for these work arrangements, ensure employees are satisfied and more likely to stick around and lower certain operational costs.

Hybrid work also creates challenges, however, including less opportunity for collaboration and connection. Hybrid work schedules may be harder to manage and track, and there could be fewer hours in the day when everyone is working at the same time, which can impact productivity.

Start addressing these downsides by creating clear, straightforward guidelines that outline policies about remote work, scheduling and other flexibility benefits. Establish goals for each team so employees



always know what they are working toward. Make sure you're bringing in the right technology and collaboration tools so employees can stay organized and track their tasks and progress remotely.

REINFORCING ORGANIZATIONAL CULTURE: FOSTERING UNITY AND CONFORMITY

Employers need an exceptional company culture to attract and retain employees. Deloitte found that 88% of employees think that a distinct workplace culture is key to business success, and Glassdoor found that 56% of adults say company culture is more important than salary in finding job satisfaction. A great culture allows employees to feel included, appreciated, motivated and connected to others.

Help employers foster a better organizational culture by first taking a look at their policies. Is transparency a priority? Are employee expectations outdated or even irrelevant when they're working remotely all or part of the time?

Employee handbooks should be revised to address:

- Communication methods for hybrid work, including changes to meeting frequency and addressing how employees will communicate with their supervisors or teammates
- Expectations specific to work-from-home behaviors, like video conference or chat etiquette
- Emphasis on how employees can reflect the values of the organization in the new work environment
- Addressing how employees, and the organization, will be held accountable in a hybrid work model
- Communicating and reinforcing productivity concerns and expectations

Remember that even with providing all the flexibility employees want, they still need structure and consistent support to succeed. Focus on helping employers establish a work culture that is rock solid no matter where people are working from.

Employers need our support now more than ever. It's on us as their PEO to proactively support them in attracting and retaining talent that performs.

Employer talent acquisition and retention struggles continue to be top of mind for most organizations. They have their bottom line and growth goals to consider, on top of enhancing their benefits and perks to ensure they're not losing great talent.

The key to helping your employer clients is to ensure they align talents' expectations with performance requirements. Support them in creating better strategies that appeal to employees while ensuring productivity stays high in the new work environment.

Leverage these outlined strategies to serve as valuable, knowledgeable coaches for your employer clients. They require expert guidance from their PEOs in an ever-evolving talent landscape. ■



HEATHER KEEFER SAULSBURY

*Executive Vice President
StaffLink Outsourcing, a
PrestigePEO Company
Sunrise, FL*



THE TRUE COST OF EMPLOYEE TURNOVER: A COMPREHENSIVE ANALYSIS

BY MARK SINATRA

Employee turnover poses significant challenges to PEOs which affect their productivity, financial stability, and overall success. In this article, we will delve into the various costs associated with employee turnover, providing a detailed analysis of the expenses involved and the detrimental effects on organizational performance.

COST AND TIME TO HIRE AND TRAIN A REPLACEMENT

The process of hiring and training a new employee is a resource-intensive endeavor. Consider the following costs.

Recruitment Expenses: These include advertising job openings, engaging recruitment agencies, conducting

background checks, and pre-employment assessments. If you utilize a recruiter for the replacement hire, and depending on the compensation of that replacement hire, expect to pay anywhere from \$10,000 to \$30,000 in fees.

Time Investment: The time spent by hiring managers, HR professionals, and team members in reviewing resumes, conducting interviews, and evaluating candidates is substantial. This investment in time detracts from other productive activities within the organization. Everyone values their time differently, but spending a collective five hours across several employees to interview just one candidate can quickly add-up. Most PEOs are not only busy year-round, but

especially so during the months of December and January and open enrollment months.

Onboarding and Training: Once a replacement is hired, there is a significant cost associated with onboarding and training. This includes orientation, introducing the new employee to company policies, procedures, and systems, as well as providing job-specific training. The time spent by trainers and the impact on productivity during the training period should also be considered. The time required to train and onboard is at a high level for remote companies, where training over Zoom or Teams may not be as effective as in-person training for certain roles.





The time spent by hiring managers, HR professionals, and team members in reviewing resumes, conducting interviews, and evaluating candidates is substantial. This investment in time detracts from other productive activities within the organization.

OPPORTUNITY COST OF NOT HIRING THE RIGHT PERSON INITIALLY

When an organization fails to hire the right person for a position, the consequences can be far-reaching.

Decreased Productivity: A mismatched employee may struggle to meet performance expectations, leading to decreased productivity within their role. This can also impact the productivity of other team members who rely on their contributions.

Lost Business Opportunities: The wrong hire may result in missed business opportunities, failed projects, or dissatisfied clients. Building and maintaining client relationships are crucial, and turnover can disrupt those connections. Let's dive further into this. Assume the average PEO client is equal to \$20,000 in annual gross profit with an average tenure of 7 years – which brings the lifetime value of that client to \$140,000. Hiring the wrong person in a client-facing or client-processing role can have an enormous detrimental impact to a PEO's performance. All it takes is one unhappy client to leave which would cause a

painful six-figure loss in customer lifetime value.

Reputational Damage: Consistent turnover may negatively affect the organization's reputation, making it less attractive to potential clients, partners, or high-quality candidates. A negative image can have long-lasting effects on the PEOs ability to attract new hires and new customers and could also hinder its ability to grow via acquisition.

COST OF INTERNAL AND CLIENT DISRUPTION FROM EMPLOYEE TURNOVER

Employee turnover can disrupt internal operations and relationships, leading to additional costs.

Knowledge and Skill Loss: When an experienced employee leaves, the organization loses the knowledge and skills they accumulated during their tenure. This loss can hinder operations, delay projects, and increase the burden on remaining employees. Smaller PEOs in general tend to have enterprise risk concentrated with a few, key employees. Key processes and knowledge vary across so many areas such as benefits administration, HRIS

High turnover rates can erode employee engagement levels, as employees may question the stability of their own positions or the organization's commitment to its workforce. Reduced engagement can lead to lower productivity, increased absenteeism, and reduced discretionary effort.

administration, payroll taxes, risk management, pricing etc.

Client Disruption: Clients often develop strong relationships with specific employees, and turnover may lead to disruption in service delivery, decreased client satisfaction, and potential loss of business. Rebuilding trust and transferring client relationships to new employees require time and effort. It goes without saying, but it is imperative that the replacement hire provide a service experience that is as good, if not better, than the prior team member.

Team Morale and Productivity: Frequent turnover negatively impacts team morale, as remaining employees may feel overworked, demotivated, or uncertain about the future. Reduced morale can result in decreased productivity, increased absenteeism, and higher turnover rates among remaining staff. Conversely if an employee, who was an underperformer or a tough fit for the company's culture, leaves that in turn can actually be a boost to company morale and to top performers in particular.

HIDDEN COSTS OF EMPLOYEE TURNOVER ON COMPANY MORALE

The impact of employee turnover on company morale goes beyond the immediate disruptions.

Decreased Employee Engagement: High turnover rates can erode employee engagement levels, as employees may question the stability of their own positions or the organization's commitment to its workforce. Reduced

engagement can lead to lower productivity, increased absenteeism, and reduced discretionary effort.

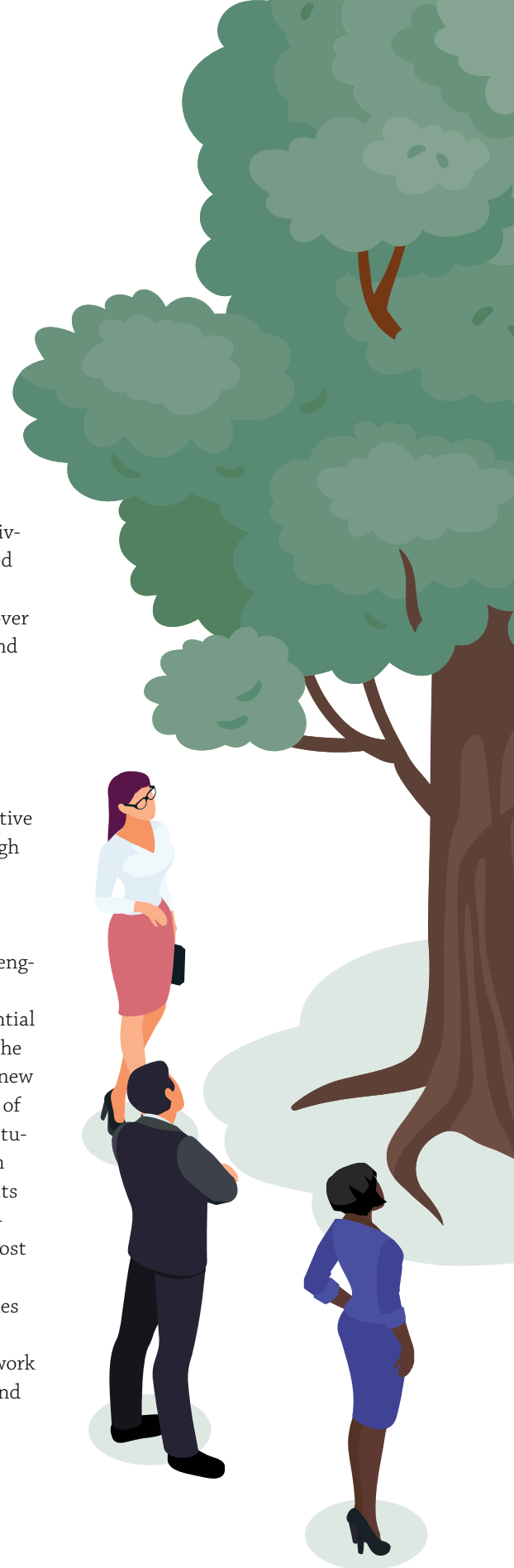
Cultural Impact: Continual turnover can erode the organization's culture and shared values, affecting teamwork, collaboration, and overall employee satisfaction. As we all know, a strong organizational culture is essential for long-term success.

Recruitment Challenges: A negative company reputation resulting from high turnover can make it more difficult to attract top talent. This creates a cycle where attracting and retaining skilled employees becomes increasingly challenging and costly.

Employee turnover imposes substantial costs on PEOs, extending far beyond the initial expense of hiring and training new employees. From the financial burden of recruitment and training to the opportunity cost of not hiring the right person initially, as well as the disruptive effects on internal operations, client relationships, and company morale, the true cost of employee turnover is significant. Organizations must prioritize strategies to reduce turnover, foster employee engagement, and create a supportive work environment to mitigate these costs and promote long-term success. ■



MARK SINATRA
CEO
Aspen HR
Dallas, TX





OFFICE CULTURE

THE IMPORTANT DYNAMICS OF OFFICE CULTURE

BY HEIDI CORRIGAN

In the fast-paced world of business, an organization's success lies not only in its products or services but also in the strength of its workforce. Even though culture is all around us, even at work, it is likely defined by different people differently. *Forbes* defines workplace culture as, "The shared values, belief systems, attitudes, and the set of assumptions that people in a workplace share." They say that behind every thriving business, there exists a vibrant and cohesive office culture that fuels innovation, productivity, and employee satisfaction. Going through the great resignation was painful; I am sure I am not alone on this feeling. Because of this, I spent a lot of time focusing on what is critical for a company culture to ensure its employees are healthy and happy. We strive every day to create an environment where employees want to stay. In this article, I will discuss the important relationship between employees and office culture, exploring how a nurturing environment can unleash the true potential of employees, creating an exciting journey towards your company's success.

THE POWER OF OFFICE CULTURE

Office culture encompasses the values, beliefs, attitudes, and behaviors that shape the working environment. A positive and inclusive office culture fosters collaboration, encourages creativity, and drives employee engagement. When employees feel valued, supported, and connected, they are more likely to unleash their full potential, resulting in higher productivity and increased job satisfaction.

BUILDING TRUST

In the last 23 years of being in the people business, I have found that trust is one of the most important qualities your team must feel. Trust forms the foundation of a thriving office culture. In a workplace

where trust is cultivated, employees feel empowered to take risks, share ideas, and communicate openly. When trust exists between colleagues and between employees and management, it creates a safe space for innovation, where new ideas can flourish without the fear of judgment or criticism. Trust also encourages transparency, accountability, and a sense of collective responsibility, leading to a stronger and more unified workforce.

RELATIONSHIP BUILDING

Theodore Roosevelt once said, "People don't care how much you know, until they know how much you care." We are in the people business. Our business is all about building relationships with our customers,

but do not forget it is also about building relationships with our internal workforce. It is important to know who your people are. What do they do outside of work? What are their spouses' names? How many children do they have? Get to know your people. Connecting with them on a non work related level is imperative to show them you care about them. It also shows that your company is not just focused on profit over people. The more you know and care about your employees, the more they will care about the company. We just implemented "Me in a Minute" to our staff meetings. We choose an employee each month that will share a 1-minute power point of their life. It has really made a difference in helping us understand each





other better. We laugh, sometimes we cry, but mostly we connect. When people know how much you care, you have begun building the foundations of trust-based relationships. It requires a genuine, non-controlling approach and relies upon demonstrated integrity and transparency.

COLLABORATION AND COMMUNICATION

Effective collaboration and communication are essential elements of a successful office culture. Collaborative communication means seamlessly exchanging information and discussing topics as a team in order to achieve a common goal. Encouraging teamwork and providing platforms for open dialogue allow employees to share insights, learn from

one another, and collectively solve problems. When information flows freely and ideas are exchanged, it fosters an environment that thrives on collective intelligence, leading to increased creativity and improved decision-making processes. Fostering a team of people willing to listen and learn from each other will create a team that feels valued.

EMBRACING DIVERSITY AND INCLUSION

A vibrant office culture values and celebrates diversity. By embracing individuals from different backgrounds, experiences, and perspectives, organizations can unlock a wealth of ideas, enabling them to adapt to an ever-changing marketplace. Inclusive practices such as diversity training, equal opportunities, and fostering a sense of belonging create a workforce that feels valued, respected, and motivated to contribute their best.

CELEBRATING ACCOMPLISHMENTS

Encouraging managers and employees to celebrate each other is a key part of creating a motivating work environment. A strong culture of praise increases engagement, productivity, team feelings, and resilience to challenges that arise in an organization. Celebrations may promote a company culture by allowing team members to come together and enjoy fun activities and feel like part of a company family. For example, at a company celebration, employees may share details about their personal lives and connect to one another on a personal level. We just hit a goal last week and have set an 80's bowling night on

the calendar to let our hair down and celebrate this accomplishment.

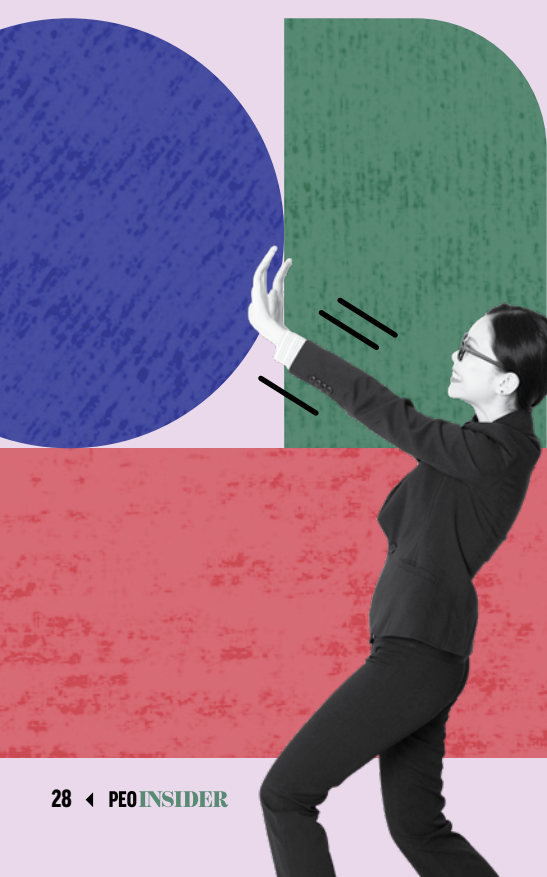
NURTURING WELL-BEING AND WORK-LIFE BALANCE

A healthy work-life balance and employee well-being are crucial for sustaining a thriving office culture. Organizations that prioritize the physical, mental, and emotional health of their employees create an environment that promotes resilience, creativity, and productivity. Offering flexible work arrangements, wellness programs, and supportive policies demonstrate a commitment to the holistic well-being of employees, leading to higher job satisfaction and lower turnover rates.

A successful organization understands that a thriving workforce goes hand in hand with a high-spirited office culture. By fostering trust, building relationships, encouraging collaboration and communication, embracing diversity and inclusion, celebrating each other, and prioritizing employee well-being, companies can unleash the true potential of their workforce. As office cultures evolve and adapt, organizations that prioritize these elements will not only attract top talent but also create a thrilling journey towards success, where employees feel inspired, engaged, and fulfilled. ■



HEIDI CORRIGAN
Chief Executive Officer
O2 Employment Services
Redding, CA



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EMPLOYEE BURNOUT: STRESSORS, REACTIONS, AND SOLUTIONS

BY CELESTE JOHNSON

I often get comments about how great it is to be a business owner. Statements like, “it must be wonderful to have complete flexibility with your time,” or questions like “do you go into the office?” Some think that owning a company means it magically runs by itself. I enjoy and appreciate being an owner and there are many wonderful aspects, but there are also times when being an owner means sleepless nights, long days, and high stress. There are times that the risk versus reward tips toward the “risk” side (IFKYK). I have felt that scale tipping more this past year, even more than during the 2008 economic crisis and initial COVID shutdowns. Employees, across the country and across all industries, are burned out and have changed workplace behavior norms.

WHAT DOES IT LOOK LIKE?

A few weeks back there was a national news story about a woman that quit her job to climb Mt. Everest. As I listened to her “inspiring” story, I paid close attention to her comments about her employer. She stated how she was “forced to quit” because

she “battled back and forth with her employer for the time off” after having already received over two months of PTO to train for her climb. With her PTO and extra leave exhausted, her employer, a small business in the finance sector, could no longer accommodate extended time off and they parted ways. This person had no issue in leaving her company, co-workers and clients to pursue her own mission of climbing Mt. Everest. She has reprioritized her life, walked away from traditional obligations like a job, and had full comfort in finding another role immediately upon her return.

This story is not unique. When I talk with my industry colleagues, we all have the same stories and frustrations about the current challenges with finding and retaining talent. Workers are burned out and leaving a job is often the first step taken in addressing overall fatigue and stress. This reality is driving employee behavior, such as the story above, and for a whole host of reasons. It is presenting itself through minimal workplace engagement, job hopping, promoting

inflated skill sets and resumes, limited loyalty, and a paucity of grit. The newest generation in the workplace (Gen Z) and even some of the Millennials have never experienced a workplace or economic crisis in their working lives. Their reaction to the pandemic is even more pronounced than more experienced generations.

HOW DID THIS HAPPEN?

We have all heard of The Great Resignation coined by McKinsey. That morphed into The Great Attrition and now we are experiencing The Great Renegotiation. The past three years have been a confluence of an already declining workforce participation rate (year over year decline since the late 90s), the initial hysteresis of the pandemic shutdown, and the subsequent prolonged uncertainty with COVID responses lasting over two years. The psychological impacts have caused a tremendous change to workforce behavior. Workers are making life altering decisions and their job is no longer at the top of the list. The ability to work in varying locations, change lifestyles to accommodate





less income, COVID relief funds, and ability to get health insurance despite work status have all been factors. Our Mt. Everest climber is just one example of the prioritization of life goals over job loyalty.

WHAT CAN BE DONE?

I don't pretend to have all of the answers. I have personally struggled finding a few key positions in the last year. Through our recruitment side of the business, our client feedback and my fantastic NAPEO network, we have come to learn a few things.

Only recently have we started to see some positive shifts with larger candidate pools, burnout recovery, and some ready and willingness to return to work. This past week, NPR did a story on women returning to the workforce in droves. With schools and daycare more stabilized, women are finding their need to have engagement and purpose is outweighing family necessities that were present two years ago. As we all have known for decades, work is not only about a paycheck.

An honest and intentional look inside your own organization is crucial. Using compensation as a sole mechanism of acquiring talent will diminish in returns. Culture, career path, and a creative environment are what inspires workers to join an organization and stay for the long term. While words like culture sound easy, they are, in fact, strategic and effortful. A good culture means leadership with drive and tenacity to maintain positivity, demonstrate where the company is going and walk around daily engaged and ready to listen. That means putting in the work to get close to the work and your team. Some other tools include using internal surveys to get feedback from teams. One-on-one meetings are a timeless approach to building relationships, and they are where the real conversations happen. The results are largely positive in having people back together in the office. Hybrid work does continue to be popular, but people are starving for personal interactions and collaboration. Lastly, if you are in a leadership role, take care of yourself. The best and most profitable thing you can do for your company is to lead a healthy example. Show the team that they do not need to work 60 hours a week for success, and that you value and honor a work/life balance. Show the team it is ok to take breaks, go for walks and exercise, and order good food and reward healthy behaviors. Be



Culture, career path, and a creative environment are what inspires workers to join an organization and stay for the long term. While words like culture sound easy, they are, in fact, strategic and effortful.

vulnerable enough to talk about using the EAP and/or health services yourself. Show how you take time off to have lunches with your elderly parents and respect and praise your employees' hobby choices. These are the intangible and real-time impacts you can make. With these actions and a little more time, I am hopeful burnout will soon burn out. ■



CELESTE JOHNSON, MBA, PHR
*Chief Executive Officer
The Applied Companies
Reno, NV*

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THE QUESTCO STORY: TREASURE WHAT IS THERE, BUILD SOMETHING BRIGHTER

BY CHRIS CHANEY

A few years ago, Questco served primarily blue-collar businesses operating largely in the state of Texas. Fast forward to today and

Questco has service centers in six states, internal employees in 26, and worksite employees (WSEs) in all 50 states. The company's client base has expanded too; Questco now serves clients across a diverse base of industries, with an emphasis on fast-growing, sophisticated businesses.

This period of growth and expansion reflects the vision of Questco CEO Jason Randall. He joined the company in 2018 with a mission to propel Questco into the next phase of the company's evolution. Randall came into the CEO role having been exposed to the PEO service model over many years as both a former executive at another PEO and as a former longtime PEO client.

"PEOs have been a central part of my own career journey, and supported my success long before I entered the industry," Randall says. "I understand the value that PEOs bring to small business operators because I've experienced it firsthand myself."

Alongside Randall in this mission to expand Questco's breadth are Chief Financial Officer Wendy Katz and Chief Operations Officer Brandon Hartsaw. Both have brought immense experience, knowledge, and expertise to their respective roles.

And to whom Randall gives much credit for Questco's success.

"The pace of change at Questco has only been possible because of Wendy and Brandon. It has been a team effort, one person cannot do it alone," Randall says.

The last six years have brought a great deal of change and transformation to Questco, much of which Randall chronicles in his Forbes-published book *Beyond the Superhero: Executive Leadership for the Rest of Us*. As the book describes, and the Questco team supports, the company's journey of growth and expansion has been successful for one main reason: its people.

FROM BRINGING DONUTS TO DELIVERING VALUE

Expanding a business is not a simple task. It is much more complicated than simply deciding one day to serve more clients. Growth has to be both strategic and tactical. And a solid foundation is paramount to successful growth. To that end, one of the new management team's first tasks was to implement standard processes and procedures and further the training and development of its employees.

"I was the first senior leadership change initiated after Questco was acquired by private equity firm Parallel49. I arrived into an organization that had been built on strong client relationships but operated in a very loose and unstructured environment,"

Katz recalls. "In order to achieve the double-digit annual growth expected by our owners, we needed a more disciplined approach to managing results that started with a long-term strategic vision and annual financial and operating targets that were well understood by the team expected to deliver those results."

"We had great people when I arrived, but our structure, from a service delivery standpoint, was not going to enable us to go after the type and volume of clients we needed to grow," Hartsaw adds.

So, he set out to re-imagine the company's service delivery model. The management team quickly understood that Questco would have to expand from serving primarily blue-collar clients in the oil and gas industry, to serving white collar businesses and entrepreneurial businesses with aggressive expansion plans.

Hartsaw asked one of the service leaders what Questco did to provide HR support to clients. The response was that they delivered donuts with the paychecks. Right away Hartsaw recognized that the sophistication of Questco's HR services had to evolve. He challenged his team to learn and understand the clients' business models. He developed strategic service approaches and tactics to leverage clients' human capital in a way that enabled those client resources to grow and thrive. The goal was to take a structure designed to support basic payroll and light

benefits and transform it into one that provided comprehensive, strategic HR support and delivered complex payroll and benefit services.

“You’ll quickly pick up on a theme here: treasure what’s there and build something brighter together,” Randall explains.

“Many members of the team had spent their entire careers here when I first arrived at Questco. They are an important part of the organization and would do anything for our clients, but they may not have had the tools or processes to grow,” Randall adds.

Indeed, one of the reasons Katz joined the company was its people.

“I was attracted to Questco because of its passionate, family-oriented employee base,” she says, “and excited about the opportunity to build something bigger with this group of highly dedicated people.”

Even as the company has expanded and transformed over the last few years, the management team still recognizes that the

core of the company’s foundation and success is its people. They place a big emphasis on hiring the right individuals who fit into the culture and embrace the drive of the organization. The management team empowers their people to be creative leaders.

“We give them authority and responsibility to run their departments as if it’s their own business,” Hartsaw says.

This approach allows managers and directors to solve problems creatively by providing the freedom and latitude to do so. It has also helped propel Questco forward and contributed to the company’s rapid growth.

The team also places an emphasis on employee training. Questco encourages employees to obtain certifications in their respective fields and provides extensive resources for continuing education and development. Certified employees bring a heightened level of credibility that helps attract discerning clients. Investing in

employees’ professional growth and development is a central part of the company’s caregiving culture.

“We always emphasize that we are a caregiving organization that shows real concern and wants to solve problems for both our client base and our employees,” Randall says.

“Questco’s warm and inclusive culture has been essential to our growth. A strong culture supports our core mission which in turn adds value to our clients,” Randall explains.

Another unmistakable—if not unintentional—key to Questco’s growth has been the rise of remote work.

A DISTRIBUTED WORKFORCE WITH A CENTRAL MISSION

Randall describes Questco’s workforce as “virtual first.” The company maintains a distributed work environment which means all employees are not based out of



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a central office. Many employees work entirely remotely.

Initially devised as a response to COVID-19, remote work became a permanent fixture at Questco once the management team realized the benefits and potential. It was never part of the plan or an idea the team had, but COVID forced a new level of creative, flexible thinking. In fact, Questco had just made significant investments in physical office space immediately before the pandemic.

“The pandemic changed work dynamics and what was acceptable in the business world. It was tough. We struggled initially but being remote allowed us the flexibility to adapt to various challenges in unique ways. Without a commute, our team members had the flexibility to work early, late, or both without having to manage drive times or childcare needs,” Hartsaw says.

After the initial adjustment period, the team began to appreciate the benefits of remote work and in fact has flourished because of the flexibility a remote work environment provides. Now, Randall says, Questco leans into remote work. It’s part of the company’s identity. Questco has fueled its growth by hiring employees from cities far from any of its brick-and-mortar service

centers and by attracting clients far from its Texas headquarters.

“Remote work has allowed us to effectively service clients from various geographic areas, fueled by the fact that it’s now an acceptable practice to conduct business virtually using tools like Zoom or Teams. We now regularly close new business with clients that are not physically located near a service center,” Katz says.

On the other hand, team members distributed across many locations presents a unique set of workplace challenges. Standardized processes and procedures and uniform practices are critical to ensure that the client experience is seamless and consistent. Transparent and concise communication is also paramount.

“The challenge is how to make this an outstanding place, ensuring our teammates are both physically distributed and emotionally connected” Randall says, “We promote candid, authentic communication and communicate across various mediums as much as we need to. There’s a lot of opportunity for miscommunication or misinterpretation when in-person dialogue is limited, so it’s important to have an atmosphere of safety to bring thoughts and concerns forward.”

“Questco prides itself on being an accountable organization,” Katz says, “but, we don’t place blame when mistakes are made. If you make a mistake, people have your back and are eager to jump in to help you fix the situation.”

This spirit helps foster and maintain an inclusive office culture.

“We also have to acknowledge that we have offices of “one” and that humans have needs tied to association and affirmation. We are very intentional about fulfilling those needs through more message-targeted meetings, regular companywide update videos, or just recognizing great work across our entire employee base as well as emphasizing the significance of a service anniversary,” Randall says.

“I always share with my team the three items key to any successful relationship: communication, communication, and communication,” Hartsaw says, “We spend a lot of time deliberately communicating and leverage technology so people feel free to chat with each other. We want our teams to gather socially, whether in person or virtual, and it’s a company policy to be camera ready at all times.”

A DOUBLE-SIDED STRATEGY

Questco’s growth has been supported by a double-sided strategy: organic sales and targeted acquisitions. When Randall and his team arrived, he knew that developing a high performing sales operation would be difficult.

“We had to build a sales operation from scratch, developing our own internal sales districts and fostering strong relations with channel partners,” Randall recalls.

The hard work paid off as Questco began to increase its reach and attract new clients. Randall says he’s exceptionally proud of his sales team’s ability to compete for business and expand markets in this highly competitive environment.

On the acquisition side, Questco has completed four transactions over the past few years. Each acquisition is hand-picked to align with Questco’s culture and to



complement its client base and service delivery philosophy. The team invests significant time and effort integrating the acquired company into Questco. They promote the idea of “One Questco,” while working hard to retain current employees and clients alike and provide enhanced training and technology to strengthen the acquired team’s skillsets.

“We make sure it’s evident how much we value the high touch service provided by the local team,” Katz says, “At the same time, it’s really important that they feel a part of something bigger and see the opportunity for their own continued growth and development.”

“The regional PEOs have outstanding retention levels due to their local presence and hard-won reputations for caring, responsive service,” Hartsaw adds, “We value that highly and fortify that by centralizing administrative functions so the local service

team can deliver more high value services and deepen client relationships.”

MOVING THE GOALPOASTS

Questco’s rapid growth and expansion begs the question: are they there yet? The answer: “The goalposts keep moving,” Randall laughs.

“We’re growing and thriving, and the value of strategic HR services that PEOs provide is evergreen,” he adds.

To that end, Randall and his team plan to keep growing, expanding, and thriving. They have built a strong foundation and assembled an exceptional team of talented people. Questco’s culture blends the structure and discipline of a large corporation, and the creativity, openness, and authenticity of an entrepreneurial startup.

New ideas and new approaches are encouraged, and healthy criticism is welcome. It’s all part of the building process.

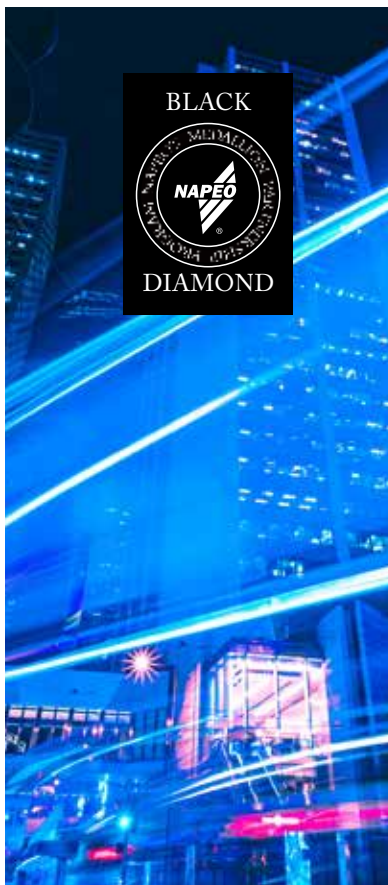
The pace of change has been rapid and at times hard, frustrating, and exhausting. In the early days of the company’s transformation, Hartsaw recognized how excited his team was about where the company was headed. He also knew that excitement can quickly fade once the reality of demanding work sets in. So, he had everyone on his team write down that day’s date and the words “I am excited.” He told them to keep hold of that note and remember it when the work gets tough. Change is hard, but he told them it’s important to always keep the end goal in mind.

The good news is that everyone on the Questco team is still excited today. ■



CHRIS CHANEY

Editor, PEO Insider
NAPEO
Alexandria, VA



Contact Kym Porter, GBA, CBC
Senior Vice President
moreinfo@peovelocity.com
610-428-7761

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THE TOP 10 REASONS YOUR PEO AND YOUR CLIENTS NEED AN AI POLICY

BY JOHN POLSON, ESQ. AND RICH MENEGHELLO, ESQ.

You might think your PEO and most of your customers don't need a workplace policy covering artificial intelligence (AI). After all, you and your customers might not have an internal AI product for workers to use, and not all your customers are in the tech space. But employees across all industries are intensely AI-curious and are wondering whether ChatGPT, Google's Bard, and other similar platforms can help them at work. With this inevitable use comes some serious legal risks for your PEO and your customers. An AI policy can reduce some of the risk. What are the top 10 reasons why you and your customers need an AI policy?

BRIEF NOTE: WE'RE TALKING "GENERATIVE" AI

You've probably been living and working with some form of AI for some time now. Maybe a chatbot providing answers to simple questions about finding resources. No doubt an auto-complete feature when you type into your email platform. Those are all examples of artificial intelligence—just in rudimentary form.

Unlike this prior technology, generative AI (GenAI) is able to generate original human-like output and expressions in addition to describing or interpreting existing information. In other words, it appears to "think" and respond like a human. But GenAI will not have the judgment, strategic thinking, or

contextual knowledge that a human does, and is limited in what it knows. These and other technological limitations and risks are why having a sound GenAI policy is so important.

TOP 10 REASONS YOU NEED A GENAI POLICY

That being said, here are the top ten reasons all workplaces—yours included—need a workplace GenAI policy.

- 1. Employees are using GenAI in record numbers.** Recent advances in GenAI, kicked off most prolifically by the release of ChatGPT and soon thereafter joined by Bard and the reformulated Bing, have captured the attention of employees thinking about the ways the technology can be used in the workplace. Like it or not, workers are using GenAI more and more every day.
- 2. Data privacy and security concerns.** Employers could have problems if they don't have safeguards protecting data inputted into any GenAI technology. At a minimum, a policy should prohibit employees from entering private or personal information into any GenAI platform—since it could be used for many purposes by AI networks.
- 3. Confidentiality issues.** Similarly, a company's most important data—trade secrets, private information, personally identifiable information (PII) of your employees and other third parties, confidential data, sensitive matters, etc.—must be kept far away from GenAI. An employee dropping confidential data into GenAI is in essence making it public information.
- 4. Commitment to diversity.** GenAI has the capacity to provide information that violates a company's strong diversity goals and also legal



anti-discrimination standards. A policy should plainly state that information received from GenAI needs to be double-checked using reasoned human judgment to ensure it does not run afoul of the company's commitment to diversity.

5. Employment decisions shouldn't be made by robots. General purpose GenAI tools should not be used to make or help make employment decisions about applicants or employees in part because of discrimination concerns. A policy should bar involvement with recruitment, hiring, retention, promotions, transfers, performance monitoring, discipline, demotion, terminations, or other decisions. Of course, if a company uses a specific GenAI tool to help navigate human resources activity, that use is OK—so long as policies surrounding that use upholds legal principles (including any relevant state laws) and the highest company standards.

6. Preventing copyright concerns. The danger always exists that information provided from GenAI platforms, including image generators, could include details from copyrighted or other protected sources. If employees use a GenAI tool to generate content for company use that happens to include information from a protected source, you could find yourself in legal hot water. GenAI can help generate original ideas, and it can help refine your original work product, but it obviously should not be used to take the protected works of others and portray them as original.

7. GenAI hallucinates. While incredibly helpful and useful, GenAI has the troubling tendency to “hallucinate” and provide false (or outdated) information with startling confidence. Companies need policies requiring workers to

But GenAI will not have the judgment, strategic thinking, or contextual knowledge that a human does, and is limited in what it knows. These and other technological limitations and risks are why having a sound GenAI policy is so important.

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confirm any information received before relying on it in any capacity.

8. Risk of data breaches. The day is coming when a GenAI platform is struck with a data breach. Employees should be warned to treat anything they plug into any GenAI platform as if it will one day go viral on the Internet—with their name and your company's identity along with it.

9. Supervisors should know. Managers should want to know when—and to what extent—GenAI was used to help complete a task. Policies could require employees to disclose when they are using the technology and the extent it aided the creation of any content they develop so that company supervisors are in the know.

10. You need to have consequences.

Finally, employees need to know they could face consequences if they abuse the technology and breach company trust. A clear-cut policy letting employees know they could face disciplinary action—up to and including immediate termination, and possibly legal action—is a helpful step along the way.

PEO customers may look to the PEO for help preparing policies and procedures to minimize these risks. PEOs who provide HR policy support for their customers should be prepared to help, just as they help with other technology policies such as proper use of email and customer networks. A standard template AI policy would be a good start. ■

▼ This article is designed to give general and timely information about the subjects covered. It is not intended as legal advice or assistance with individual problems. Readers should consult competent counsel of their own choosing about how the matters relate to their own affairs.



JOHN POLSON, ESQ.

*Chairman & Managing Partner
Fisher Phillips
Irvine, CA*



RICH MENEGHELLO, ESQ.

*Chief Content Officer
Fisher Phillips
Portland, OR*

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HOW INSPERITY RETAINS EMPLOYEES BY OFFERING SUPPORT TO SHOULDER CAREGIVING BURDENS

BY JOY AWE AND CHRIS SANDERS

In the last few years, more than 2 million women have left the workforce, taking valuable skills and their expertise with them. The balancing act many employees, especially women, face in managing their caregiving responsibilities and jobs can be unsustainable at times, and it can feel easier to choose one or the other. Unfortunately, this is detrimental to these individuals and their families who rely on that income, and it is a significant loss to employers and the economy.

Roughly 60 percent of Insperty's employee population is female, and a significant portion of employees are caregivers. Many belong to the "sandwich generation" simultaneously raising children and caring for elderly family members. For these employees, caregiving can feel like a full-time job. Insperty recognized the need to offer more comprehensive support to reduce stress, make their lives easier and ultimately retain those employees.

One of the core values at Insperty is "taking care of our people," and the



When considering if caregiver support would be beneficial for your corporate employees, do not be shy about asking your employees what they need.

company did not want its employees to feel like they have to choose between their professional life and their caregiving responsibilities. In 2019, Insperty began the search for a solution that could expand beyond its legacy Employee Assistance Program and offer a premium support service to share some of the burden caregivers carry every day.

On April 1, 2020, Insperty launched Cariloop to its corporate employees, just as offices and schools were closing and nearly every family was struggling with caregiving responsibilities in some way or another. At that time, many employees had kids at home or their elderly family member's care facilities were on lockdown, medical providers were closed or services were very limited, and there was much uncertainty and fear. Stress and distraction were at an all-time high, and having experts available through Cariloop's Care Coaches to help resolve some of those caregiving concerns and share the mental load was invaluable.

I experienced this for myself as one of Insperty's first employees to open a case. As Insperty's Senior Health & Welfare Content Designer, I was at home with a 5-year-old doing Zoom

kindergarten and a 2-year-old at the height of her tantrum-throwing phase who just wanted to scream all day, and my husband and I were both trying to work from home and take video calls. We didn't feel safe sending the kids to daycare, but the situation was absolutely not working for anybody.

I reached out to Cariloop for ideas, and my Care Coach suggested my daughter's daycare likely had furloughed workers who could use other work and were already familiar to my daughter.

Sure enough, her favorite teacher's aide had been furloughed, and she was very happy to come work for us a few hours a day to play with the little one and help the older one with online assignments. She became part of our "pandemic bubble" and helped us until she left for college, when she referred one of her friends to take over. I wouldn't have come up with that idea on my own, and she was an absolute godsend.

I remember seeing many of her female friends in her stage of life leave

their jobs during that time because they didn't have a way to balance the family and work demands. I reflect on the fact that having the support and a company culture that cared about her well-being as a mom and caregiver, the thought of leaving never even crossed her mind.

Today, Insperity's corporate employees receive robust support with their care needs, giving them time back in their day as well as mental and emotional bandwidth to devote back to their family or their work. Some of the common



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needs that employees no longer have to navigate alone include researching and vetting senior care facilities, choosing a new daycare, getting their child's Individualized Education Program (IEP) worked out with the school, navigating Medicare for a parent or grandparent, exploring mental and behavior health providers, and even finding scholarships for their incoming college freshman to apply for. As it continues to improve how it cares for its people, Insperty is also in the process of launching an Employee Resource Group for caregivers and hosting regular webinars about caregiving topics.

When considering if caregiver support would be beneficial for your corporate employees, do not be shy about asking your employees what they need. Insperty has an annual Voice of the Employee survey that includes an online survey and in-depth, one-on-one interviews with a sample of employees who agree to participate to hear what is working and not working. The valuable input received from this survey is used to inform future benefits and HR strategies. Employees might be hesitant to bring up some of their concerns if they aren't being asked for feedback, so encouraging open conversations and sharing real needs is paramount.

In addition, be clear on what type of support you are looking for during the search process. For Insperty, a personalized solution that provided a high-touch experience was critical. When an employee opens a case, they work with the same Care Coach and develop a relationship rather than getting somebody new each time they reach out. Insperty also wanted an inclusive

Caregiving is something that will touch almost everyone at some point in their life. Even if your corporate employees or worksite employees are not talking about their personal struggles openly at work, caregiving demands take a toll in the form of emotional distress to the employee, lost productivity and turnover.

solution that could help with all aspects of the caregiving journey, including childcare, parenting and eldercare. Finally, Insperty recognized that caregiving is often a team sport, and sometimes families are spread out across the country yet need to be able to share responsibilities. The fact that employees can add other people to the "care team" and allow their friends or family members to use the platform was attractive.

Three years later, Insperty is proud to be the first PEO to offer a caregiver support benefit by providing Cariloop at no cost to their worksite employees who are on Insperty's most robust benefits package. If taking care of its people is a priority for Insperty, it stands to reason that it's a priority for many of Insperty's clients too. By offering Fortune 500-caliber benefits that include caregiver support, Insperty is helping its clients retain talent, provide more robust solutions to their employees and, ultimately, allowing them to focus on what they do best—running their business.

Caregiving is something that will touch almost everyone at some point in their life. Even if your corporate employees or worksite employees are not talking

about their personal struggles openly at work, caregiving demands take a toll in the form of emotional distress to the employee, lost productivity and turnover. It's time employers take an active role in learning these needs and determining how to best support them. In fact, you might be surprised to find out just how many employees are quietly fighting the same caregiving battles and would be tremendously relieved to have somebody on their side to help. ■



This article is designed to give general and timely information about the subjects covered. It is not intended as legal advice or assistance with individual problems. Readers should consult competent counsel of their own choosing about how the matters relate to their own affairs.



JOY AWE

Senior Health & Welfare
Content Designer
Insperty
Kingwood, TX



CHRIS SANDERS

Senior Director of Strategic Growth
Cariloop
Richardson, TX



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THE DIGITAL IMPERATIVE: ADAPT OR BECOME OBSOLETE

BY RYAN R. MOSSMAN

Experts have written articles for decades urging companies to update their business with cutting-edge technologies. By now, you may have been lulled to sleep by such headlines, content with your current processes and an “if it’s not broke” mindset. You may even be convinced that recent technological advancements like artificial intelligence (AI) are just a fad or something to ignore. However, given the exponential rate at which new cutting-edge technology is transforming every industry—including the PEO industry—you and your business no longer have the luxury of complacency.

Change is happening quickly—for proof, look no further than ChatGPT.

In a couple of months, the generative AI application gained 100 million users. Within AI alone, there are many other compelling applications across a multitude of business functions, but AI is just one of the many rapidly advancing technologies. RPA (Robotic Process Automation) and advancements in analytics and algorithms in your existing PEO software solutions are also evolving quickly. To stay competitive and to ensure your business’s survival, transforming your business with the latest technology is necessary. This is not the boy crying wolf, tricking the villagers into a false panic. The wolf is here. It’s circling your flock, and it will not be easily satisfied. To survive, the time is now to apply the latest technology to all

aspects of your business, and not just where you’ve traditionally used it before.

GOING ALL IN ON DIGITAL MARKETING

By now, most PEOs have implemented some level of digital marketing and are leveraging a CRM application to increase and track leads. While that’s a good start, if you have not optimized your operations with these tools—by combining them with AI or RPA to exponentially improve your message, target prospect evaluation and customer acquisition—then you’re missing out on significant additional revenue. These tools can dramatically increase the number of prospects you reach and ensure that each one is highly qualified. By leveraging AI capabilities embedded in the leading CRM and social media applications, you can also further accelerate your revenue growth by scoring leads faster, analyzing marketing strategies in real-time and personalizing digital content.

DRIVING EFFICIENCIES WITH PEO SOFTWARE

While attracting new clients and effectively managing leads is critical for continued growth, efficiently servicing current clients is just as important. This capability starts inwardly with your team’s communication and extends outwardly with the service your team is equipped to provide. Robust ticketing systems and knowledge sharing platforms that include different communication methods are two examples of solutions you can utilize to drive coordination in your business. Increased collaboration among your team makes sure that customer issues are addressed quickly



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Increased automation is not the only way your PEO software providers are evolving their systems to transform your business. Look for newfound flexibility in software workflow and process sharing as there are some tasks your customers prefer to do themselves.

and correctly. Furthermore, you can enhance these solutions by leveraging their newer capabilities that autogenerate action items from meeting notes, summarize shared documents and automatically derive technical specifications.

Given the amount of resources used when you deliver payroll and benefit administration, which are at the heart of every PEO, it is no surprise that these areas also contain the greatest opportunities for optimization. Keep up with your competition by choosing the software that helps you reach those efficiencies with cutting-edge features centered around dynamic reporting engines, automated benefit reconciliation, inline application help centers, easy-to-use mobile applications and tools to quickly onboard both new clients and new employees. While each PEO is unique, automating the reconciliation between payments and collections is one area of universal opportunity. Applying technology to benefit reconciliation can drive huge savings, both in “found money” and in increasing the productivity of your team.

Increased automation is not the only way your PEO software providers are evolving their systems to transform your business. Look for newfound flexibility in software workflow and process sharing as there are some tasks your customers prefer to do themselves. Better enabling them to do so via flexible technology which effectively

“turns the screen around,” allows your customers to complete tasks they’re better suited to perform (such as electronic onboarding and benefits enrollment). In those instances, you end up shifting work to your customers, while at the same time increasing their satisfaction. This shift enables your team to use their newfound time to provide greater customer care.

BOLSTERING YOUR CYBERSECURITY

No area better than cybersecurity exemplifies the rapid pace of change we are seeing, and there are even more changes on the way. If you haven’t started asking questions like “How do I know you are who you say you are?” in the context of your PEO and how you handle and allow access to personal information, then it is time to do so. In a not-so-distant future when AI and quantum computing combine, voices will be regularly impersonated, facial recognition will be fooled, and email or text messages will be manufactured to sound convincingly authentic.

No matter what the future holds, you need a renewed vigilance around exploring technologies that are built for, or are preparing for, such scenarios. Deploying Zero-trust, least privilege access controls, and new stricter user authentication are just beginning steps. With artificial intelligence-powered threat monitoring, automated incident response, and newer methods of MFA, you can better protect

your customers’ trusted data. Further protect your business by properly arming your first line of defense—your PEO team—with knowledge and continual (i.e. not periodic) security training. Lastly, to keep ahead of the bad guys, make sure to stay informed by leveraging the cyber resources available through NAPEO, PEO Defender and other organizations.

ADAPT OR BECOME OBSOLETE

This article just scratches the surface on identifying potential areas of opportunity within your company and the tools available to you to optimize and adapt. Rather than scrambling to accomplish everything at once, step back and think critically about where within your business you should initiate change first (whether that be in digital marketing, operations or security). While it is important to determine the best area, it is critically important to start immediately.

Today’s technology revolution, accelerated by the emergence of artificial intelligence and other cutting-edge technologies, will play out in the next several months, not years. No one knows exactly what long-term effects these advancements will have, but diligently preparing for, and adapting to, change now will allow your business to be better positioned to stay competitive, survive, and ultimately thrive, no matter what comes. Make the right decision for your business today—or continue to choose complacency and let the wolf eat you. Your competitors are not waiting for you to catch up. The choice is yours. ■



RYAN R. MOSSMAN

President
PRO Software
Houston, TX

SECRETS OF PROTECTING YOUR MLR AND MARGIN: CONFESSIONS OF A GROUP INSURANCE BROKER

BY ERIC RAYMOND

In a previous article, I encouraged PEO operators to take another look at group insurance brokers and even see some PEO brokers as channel partners. In this article I'm going to share with you another secret: How to protect yourself from us brokers. Remember, if you manage this channel correctly, brokers will be your lowest cost of new client acquisition, create longer retention, and create an endless and consistent flow of beautiful new deals. However,



Here is the reality: many brokers are smarter than most PEOs when it comes to group insurance, underwriting and rates. It's all we do other than go to lunch and golf. So, let me share some secrets about how we brokers can still get great rates from you on cases that you shouldn't want.

if handled poorly, your master plan medical loss ratios (MLR) could be very RED.

Here are a few secrets to win in the PEO broker channel.

The most important undervalued factor is your company's and your salespeople's relationship with the brokers you choose to do business with. It seems many PEO salespeople go wide rather than deep with

brokers. They don't spend time understanding the broker's actual business model or their block of existing business (which is your *future pipeline* and your future block of business).

A shortcoming I've noticed is that many internal broker channel salespeople

are not trained correctly to properly build a relationship with brokers and general agents.

Many PEOs use a software system like GRX or Sail for example. These platforms are designed to protect your medical master plans integrity, right?

They are supposed to make sure you know the risks way better than in the past and not get bad risk cases or at least know how to price them correctly, right?

Here is the reality: many brokers are smarter than most PEOs when it comes to group insurance, underwriting and rates. It's all we do other than go to lunch and golf. So, let me share some secrets about how we brokers can still get great rates from you on cases that you shouldn't want.

First, you need to remember *why* risk tools are so great. If you aren't using them right now, you should be.

The premise of these tools is to identify specific individuals using their names, ZIP codes, and dependent information. It will then run them through the pharmacy benefit managers (PBM) which are the systems that track most of the non-specialty and some specialty drug utilization when you use your drug cards. These products also now access labs, and other sophisticated data bases and A.I. tools to see way beyond drug and other medical usages including lifestyle.

These amazing risk tools use various algorithms to deduce past medical issues and costs, and most importantly, the future cost projections of the individuals they find.

Large insurance companies have been experts at this for a long time. Most of the sophisticated carriers not only look



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at claimants from past years, but also do a deep dive on each participant to project the prognosis and claims will be in the following year.

The amazing underwriting breakthrough is that there are tools out there that make it possible to do some portion of that for smaller groups for the first time. The products continue to improve daily. As I said, if you are not using these tools, you should be.

Your MLR should never go bad. In fact, the ACA has basically given you keys to the low-risk groups of America. You have the right to cherry-pick only good cases, to skim the good risks from the system and other private carrier competitors.

So how do brokers beat this and mess up your MLR? It's kind of obvious really; the risk tools need a quality census that gives enough information on the bad claimants and potential bad claimants (those with low claims but are *medical timebombs*) to be identified, including dependent information.

However, identifying individuals in electronic medical record (EMR) databases is not easy, even when provided with more information than you would get from a census. Interoperability is still way off.

Ok, so you put in all the right information into your risk guardian tool and so you think you'll get an accurate table rating risk score, but this can still be way, way, way off in reality!

Even good risks can go bad at some point, so obviously you need to strictly monitor each case before renewal. This brings up another fundamental requirement: the ability to shop a case with a high renewal in the private market before you deliver the renewal.

So, here's why your risk scores can be way off.

It's about data. The assumption is it is complete and accurate.

But even when you have the employees' zip code, birthdate, and full name, these tools still don't identify and find everyone. Also, note the tools are limited for groups over 10 employees. Dependents are often the least identified from the census data, and those dependents are often the largest claims!

These tools do identify the percentage of the dependents and employees that have not been identified and tell you the ratio. But if this factor isn't weighted correctly in your underwriting process, you are going to wind up with way more high-risk clients than you expected. Say goodbye to your MLR.

At every stage, you need to remember that brokers know how to get good rates. So, what can you do? Here are a couple of recommendations.

Even good risks can go bad at some point, so obviously you need to strictly monitor each case before renewal. This brings up another fundamental

requirement: the ability to shop a case with a high renewal in the private market before you deliver the renewal.

What do you do when a case goes bad, and you need to present a high renewal?

If you don't shop the private market first, the client will automatically just run back to their previous broker you took the case from who will both find an option and replace you and the PEO fees. By shopping the market, you obtain credibility and can show that the renewal is still the best available and if it isn't at the same time protect your MLR and sell them a medical plan from the private market (and make the commissions) and keep the PEO admin fees! If you don't do this, say goodbye to retention and your MLR. ■



ERIC RAYMOND

CEO
Broker Quoter
Bala Cynwyd, PA

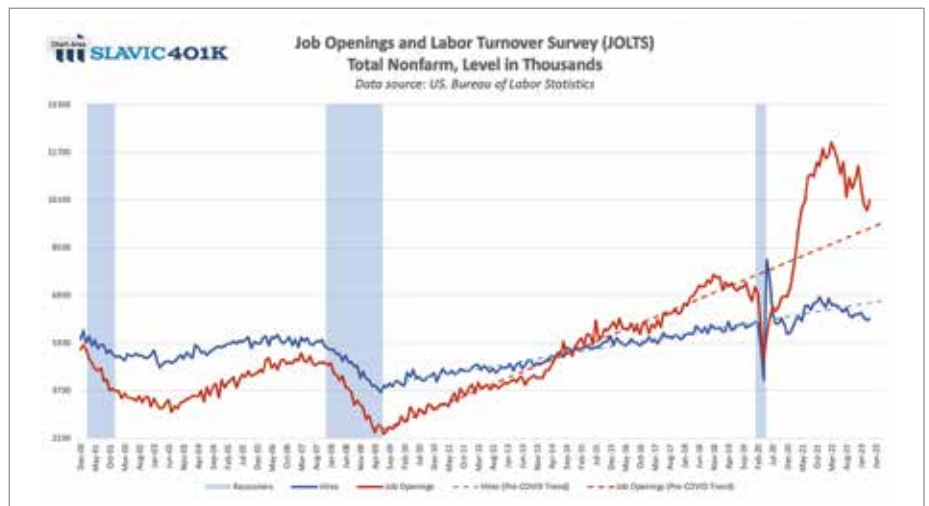
LABOR MARKET STRONG DESPITE RECESSION FEARS

BY JOHN J. SLAVIC

The PEO Employment Index has been moderate for the last few quarters as business pessimism, inflation and concerns about an impending recession seemingly has SMSB's contracting in hiring. Not all data suggests that this is the case. The JOLTS chart below, indicates a very strong labor market. In addition, there are almost five million more job openings than available workers. Looking at the PEO Index and JOLTS together suggests continued strength in the PEO space. Even if we technically had a recession (back-to-back quarters of negative GDP) it likely would not be felt, given the strength of the labor market. ■



JOHN J. SLAVIC
CEO & President
Slavic401k
Boca Raton, FL



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Jennifer Robinson, President
Risk Transfer Insurance Agency
jrobinson@risktransfer.com
407-230-6953
<https://risktransfer.com/>



NEW BLOOD, FRESH IDEAS

BY PAT CLEARY

My friend Pete Pantuso has been CEO of the American Bus Association for more than two decades. One day at lunch, I asked him how he kept it fresh. His answer was as straightforward as it was simple: “New blood,” he said, “hiring new people.” Those new people brought with them new ideas and perspectives. We discussed it further. It’s a balance. No organization wants rampant turnover and churn. At NAPEO, we are lucky to have a number of long-tenured employees. They provide stability and institutional memory—and the all-important relationships. But turnover is a fact of life for every organization, and we are no exception. But as my friend Pete said, with that turnover comes new ideas and perspectives and keeps us fresh.

And so it was, we were lucky to conscript Farrah Fielder, our former general counsel, to return to NAPEO in the COO role to step into the big shoes vacated by Melissa Viscovich in May after 26 years. If it’s possible for a transition to be seamless, this has been. It helped that Farrah knew us, that’s for sure, but it’s as if she never left.

Hannah Walker joined as Senior Director of State Government Affairs.

She had been General Counsel of Unique HR in Texas (We owe Garry Bradford a future draft pick). In her first month she has hit the ground running, leading our state government affairs team of Kristin Baldwin and Emily Marsh.

With Farrah, Hannah, and our General Counsel Nick Kapiotis, we now have three members of the team who have deep experience working for a PEO, a first in our history. I always remind people that I run a trade association, not a PEO. The practical know-how that they bring to the table each day is invaluable and enables us to provide the great member service you’ve come to expect from us.

The board told us to beef up our federal government affairs presence. Our industry is growing and our lobbying footprint needs to match that growth. So, in addition to hiring Mehlman, our outside lobbying firm, we added Alex Milliken as director of federal government affairs. Alex comes to us with experience on Capitol Hill and in the advocacy world. He’s sharp and gregarious and has already been helping Thom Stohler by wearing out his shoe leather in the halls of Congress and at various PAC events where we are now players.

We’ve also added some other key staff. Andrea Desmond joined us from the National Association of Corporate Directors (NACD). Since arriving in March, she’s been working the phones to check in with members. Many of you have already heard from her. She is smart and enthusiastic and has also fit seamlessly into the team. Everyone knows I care about culture. All our new hires have not only melded with the culture, but have reinforced it.

Reporting to Robin Schlesinger, Cass Likouris and Blake Waravdekar round out the newbies as member services coordinator and manager of events, respectively. If you’ve been on any webinars lately, you’ve seen Blake, as she is honchoing those. She also comes to us with an association background and is already teeing up ideas for ensuring the smooth running of our meetings—which are growing in number. Cass—a recent college graduate—worked for a small association before coming to us. She’ll be assisting the membership department as well as spearheading member engagement on social media.

Together, it’s a fun, irreverent group. We like one another, we have lunch together every Thursday. It’s loud and raucous, but fun. Then it’s back to work for you, the members. This team will guarantee our success for years into the future. ■



PAT CLEARY

*President & CEO
NAPEO
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