

# PEO INSID

PUBLISHED BY THE NATIONAL ASSOCIATION OF  
PROFESSIONAL EMPLOYER ORGANIZATIONS\*

THIS MONTH'S FOCUS

## EMPLOYEE ENGAGEMENT

ESTABLISHING  
CULTURE

ROLE OF  
COMPANY VALUES

ELEVATING  
ENGAGEMENT

COVER STORY

# MEET CASEY CLARK

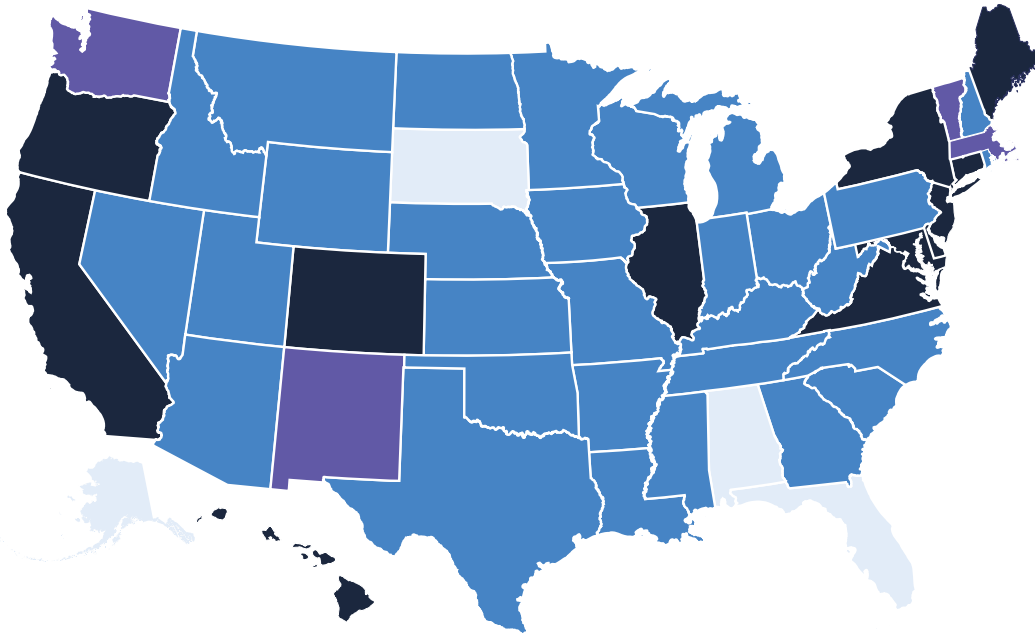
NAPEO's New President & CEO

THE SOURCE FOR PEO EDUCATION\* 707 NORTH SAINT ASAPH STREET, ALEXANDRIA, VA 22314 [WWW.NAPEO.ORG](http://WWW.NAPEO.ORG)

VOL. 28 ISSUE 1

FEB 24

# State Mandated Retirement Plans for Small Businesses



Source: Georgetown University for Retirement Initiatives

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► Casey Clark

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**COVER STORY:**

Casey Clark: NAPEO's New President and CEO

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Workplace Culture: How to Set an Effective Strategy and Build upon It  
*Angie Garcia*

In October of 2023, FrankCrum published a Culture Code to its nearly 500 employees, the most comprehensive work undertaken by the company on the topic of culture to date. Here's what we learned.

### ROLE OF COMPANY VALUES

From Threatening to Thriving: My Workplace Culture Story  
*J. Rose and Sher Shields*

If you had asked me ten years ago about the importance of having a positive workplace culture, I would have laughed out loud. Despite being a numbers person, my experience has taught me firsthand that workplace culture matters.

Weaving Company Values into Strategic Initiatives to Create a Destination Workplace  
*Michelle Mikesell*

At G&A Partners, we know that our employees are the heart and soul of all we do, so we focus on ensuring this is a destination workplace where people want to work, not have to work.

### ELEVATING ENGAGEMENT

Lifting Business Success by Elevating Engagement  
*Beth Sunshine*

We all know employee engagement is important, but unfortunately, that's not enough. Making it happen is the hard part!

FEBRUARY 2024



# Ints

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# A NEW CHAPTER: CASEY CLARK TAKES THE HELM

BY STEVE POLITIS, ESQ.

**I**t is with great excitement that I reshare the news of the dynamic addition to the NAPEO family—Casey Clark, our new President and CEO. If you have not had the chance to meet him, then when you do, you will feel his enthusiasm and see the knowledge and expertise he brings to our great association.

As a refresher, after a thorough search process, we selected Casey to lead NAPEO into the next phase of growth and advocacy. Remarkably, he has already been on the job for three months, diving headfirst into the intricacies of our industry while purposefully getting to know the NAPEO team, membership and key stakeholders. Despite the vast amount of information and the speed at which we've shared details about ourselves and the industry, he has effortlessly retained everything thrown at him. Casey has been a quick study, and it feels like he has been on the job for three years not three months. This reinforces his dedication and

eagerness to make an immediate impact while still retaining his methodical and deliberate persona. It is a testament to not only his commitment to the job, but more importantly, reflects the person he is, both professionally and personally.

Let me share a few abbreviated stories that epitomize Casey's dedication. After he was hired, but months before his official start date, he spent time with me at NAPEO HQ to meet with not only senior staff but all team members, to learn about each and every person at NAPEO, who they are and what they do outside of the office.

To say that Casey took the scenic route to get to his first official day on the job would be an understatement. Prior to Casey even interviewing for the NAPEO job, he had planned a scheduled trip, years in the making, to Paris to celebrate a milestone anniversary with his wife. As luck would have it, his trip overlapped with our December Board meeting in Sarasota. Casey knew he had to celebrate with his wife but also felt

compelled to spend some time with the board for our last in-person get together in 2023 and our last meeting with Pat at the helm. I'm not sure how he did it (I didn't see any direct or connecting flights that took less than 14 hours) but, somehow Casey showed up, on time, for his first day as CEO of NAPEO.

By Casey starting early in December, it allowed him to work closely with Pat for a month. This collaborative period laid the groundwork for a seamless transition and showcased the strong bond between outgoing and incoming leadership. Let's not forget, the IRS was very active at that time with them releasing their opinion on PEO liability for our clients' ERTC claims as well as the expedited time sensitive December 31 fax filing option for CPEOs. Nothing like drinking out of a fire hose on day one.

Casey's previous role as the Senior Vice President of the American Gaming Association provides an ideal perspective that aligns with the challenges faced by the PEO industry. Like gaming, our sector doesn't neatly fit into regulatory or legislative landscapes, necessitating our role as responsible stewards of the PEO industry.

If you haven't already, I encourage you to extend a warm welcome to Casey. His passion for our industry and commitment to its success make him an invaluable asset to NAPEO, and I am confident that under his leadership, we will continue to reach new heights.

Welcome, Casey! ■



**STEVE POLITIS, ESQ.**

2023-2024 NAPEO Chair  
CEO  
Alcott HR





KUDOS

## TRINET NAMED ONE OF AMERICA'S GREATEST WORK PLACES FOR DIVERSITY

NAPEO member TriNet recently announced that it has been recognized as one of America's greatest workplaces for diversity by Newsweek, earning the highest rating of five stars on the list of mid-size companies nationwide. "We are honored to be among the very best workplaces in the country for diversity," said Catherine Wragg, TriNet's chief people officer. "At TriNet, we strive to create a culture of belonging for all our colleagues. I am incredibly proud of our team's diverse perspectives and innovative solutions that they bring to work every day in support of each other and our valued SMB customers."

TRENDS

## 2024 HR, BUSINESS TRENDS TO LOOK OUT FOR

In a recently released report, World of Work Trends 2024, Top Employers Institute analyses the latest trends in people strategies and practices from leading organizations. The study found five major trends affecting workplaces. Those trends are:

- AI
- Purpose driven leadership
- Meaningful employee engagement
- Enhance employee wellbeing
- Broadening DEI initiatives and programs

LC

## NEW LEADERSHIP COUNCIL CHAIR, VICE CHAIR ELECTED IN NEW ENGLAND, TEXAS

In December of 2023 we held elections for two Leadership Council positions: New England (chair) and Texas (vice chair). Our longtime New England chair, Bob Burbidge of Genesis HR Solutions, retired last Fall. We thank him for his many years of service to NAPEO and the New England LC, and we would not be where we are today without him. We are pleased to announce that Tim Graham of Payrolling Partners has been elected to serve the remainder of Bob's term, concluding on December 31, 2024. An election for the full two-year (2025-2026) term will be held at the end of this year. In Texas, Corey Hookstra of ESI has been elected as vice chair of the Texas Leadership Council. Please join us in congratulating both. If you're interested in becoming more involved in your leadership council please contact Hannah Walker ([hwalker@napeo.org](mailto:hwalker@napeo.org)).

CONGRATS

## LBMC EMPLOYMENT PARTNERS ANNOUNCES PARTNERSHIP WITH TENNESSEE CHAMBER OF COMMERCE

NAPEO member LBMC Employment Partners recently announced that it has joined the Tennessee Chamber of Commerce and Industry/ Tennessee Manufacturers Association as an Affinity Partner. "We are honored to join forces with the Tennessee Chamber and are thankful for the opportunity to provide valuable HR support and resources to its esteemed members. We look forward to further contributing to Tennessee's thriving economy through continued partnerships with the business community," said Sharon Powlus, president and CEO of LBMC Employment Partners.





WELL-DESERVED

# UTAH BUSINESS NAMES G&A PARTNERS AND STRATUS HR TO 2023 BEST COMPANIES TO WORK FOR LIST

NAPEO members G&A Partners and Stratus HR were recently recognized by Utah Business on their Best Companies to Work For list. The award is determined by anonymous employee feedback about benefits, work/life balance, training opportunities, work environment, community involvement, performance, leadership, and more. Survey results were then objectively collected and analyzed by Qualtrics. Congratulations to both outstanding companies!

DIGITAL

## DON'T FORGET: NEW PEO INSIDER WEBSITE LIVE NOW!

The wait is over! We're excited to announce that the all-new PEO Insider website is now live. Check it out at [www.peoinsider.org](http://www.peoinsider.org). You can now read the industry's leading publication in a sleek, modern digital format. The latest issue and top stories are displayed prominently on the homepage along with the latest bits of industry news. You will also benefit from an improved search function, allowing easy access to many years of past articles.

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ADVOCACY

## NAPEO URGES IRS TO REVERSE PAYROLL TAX LIABILITY POLICY

We sent a letter recently to IRS Commissioner Daniel Werfel urging the agency to reverse its recent payroll tax liability policy holding PEOs solely liable for tax credits taken by their clients. In the letter, we laid out the case that the IRS's position is at odds with a 2021 congressional directive regarding tax liability and that a PEO/CPEO cannot be held responsible for payroll tax credits based on information solely within the control of the client. For more information, please contact Thom Stohler, [tstohler@napeo.org](mailto:tstohler@napeo.org).

EVENTS

## UPCOMING LCF AND NEW YORK ADVOCACY DAY

Our events team is hard at work planning our LCFs for 2024! Start your year off with a bang and consider attending one of the following NAPEO state events ([napeo.org/events](http://napeo.org/events)):

- Oregon Advocacy Day- Thursday, February 8 (Salem, OR)
- Georgia Advocacy Day & LCF - Tuesday, February 13 (Atlanta, GA)
- New York Advocacy Day - Monday & Tuesday, March 11-12 (Albany, NY)

JOINT EMPLOYER

## US HOUSE PASSES RESOLUTION TO OVERTURN NLRB JOINT EMPLOYER RULE

On January 12, the U.S. House of Representatives passed a NAPEO-supported resolution nullifying the National Labor Relations Board's overreaching joint employer rule. The Senate has yet to schedule a vote on its version of the resolution.

We've been actively involved in efforts to overturn the rule and reinstate the joint employer standard that had been in place and effective for more than 40 years. As a long-standing member of the Coalition to Save Local Businesses, we support a joint employer standard that provides certainty as to when joint employer status is triggered and uniformity so that employers are not subject to different outcomes under conflicting statutes.

We issued a statement commending the House for its passage of the motion and urging the Senate to follow suit. We will continue to lobby against expanding the definition of joint employer under federal employment law, and against any standard that makes PEOs liable for actions taken by worksite employees that the PEO has no control or direction over.

CONTRIBUTE

## INTERESTED IN CONTRIBUTING TO PEO INSIDER?

Interested in sharing your expertise? Have insight into challenges and tricky issues?

Write for PEO Insider! As the only publication focused exclusively on the PEO industry, PEO Insider provides a platform for people like you to share knowledge, expertise, insight, and information with peers.

You see, we depend on volunteer authors to contribute meaningful, engaging content. We can't do it without you. We feature a variety of perspectives from PEOs of all sizes to produce a compelling issue each month that benefits you.

So, want to write? Keep in mind these important points:

- Authors must be current NAPEO members
- Articles may be co-authored
- Articles must be educational and informative, not commercial and promotional.

Reach out to Chris Chaney ([cchaney@napeo.org](mailto:cchaney@napeo.org)), *PEO Insider* editor, to express interest and learn more. ■

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# ESTABLIS CULTU



# THING JURE

## BUILDING BLOCKS FOR SUCCESS: HOW AND WHY COMPANY CULTURE SHOULD BE DEFINED

BY HEATHER KEEFER SAULSBURY

**A** strong work culture typically doesn't happen organically. Leaders must be deliberate and consistent when planning how to define and build a more positive culture. A company's organizational culture is one of the key defining factors in its identity and ongoing success. Often, leaders may not realize that their workplace culture is a deliberate and conscious decision which is guided by company values, goals, and individual employees.

A great culture is also good for business. 47% of companies<sup>1</sup> that have successful company cultures report revenue increases over the last year, compared to just 9% of companies with less successful cultures reporting revenue increases.





employees can thrive, collaboration can flourish and the organization can achieve its goals. Otherwise, all of these areas may stall.

A toxic culture can have significant effects on an organization such as low employee morale, decreased productivity, higher turnover rates, poor reputation and even legal issues. The impacts reverberate beyond the internal operations of the company, affecting the brand's image and customer satisfaction.

Recognizing the signs of a poor culture is crucial for leaders to address issues promptly to prevent long-term damage. Once they address the issues, it's time to implement strategies to course-correct.

### STRATEGIES FOR DEFINING AND BUILDING A POSITIVE CULTURE

Employees who have worked for a great company know the signs of a positive work culture, especially when compared to an unsatisfactory one they've experienced. Workplaces with positive cultures prioritize employees, including their feedback and career goals. They compile benefits that employees need and want. Teams work together well because everyone has a sense of purpose, and they know their place within the overall organization.

Creating a positive culture requires a multifaceted approach. Consider these

key strategies for improving workplace culture.

#### 1. Identify Core Values

Strong workplaces are comprised of employees who understand a company's vision and support its mission. The business's purpose should be clear and frequently communicated.

Employees must also have their own senses of purpose, which is important for engagement and job satisfaction. According to Gallup's recent "State of the Global Workplace" report<sup>2</sup>, engagement impacts employee stress at work 3.8 times as much as work location. Engagement matters, and emphasizing core values helps companies improve rates.

#### 2. Promote Open Communication

Today's employees feel strongly about transparency. They want to know what the company's doing, but also how they are performing and where they stand. This requires regular feedback, ideally one-on-one, where employees can understand how to improve, receive support and give their own feedback about the workplace.

Employees want the company they work for, and their manager, to be transparent. 24% of employees<sup>3</sup> say they would consider leaving their jobs if their managers don't provide enough feedback.

### WHY LEADERSHIP NEEDS TO DEFINE COMPANY CULTURE

The initial step in fostering a positive organizational culture is for leadership to make a strategic decision. Culture left to chance or organic evolution rarely becomes successful. Leaders must carefully define the values, beliefs, and behaviors that reflect the essence of their organization.

This deliberate approach lays the foundation for a workplace where



# The initial step in fostering a positive organizational culture is for leadership to make a strategic decision. Culture left to chance or organic evolution rarely becomes successful.

### 3. Provide Professional Development Opportunities

Many top performers won't be satisfied or engaged at work if they don't continually grow. Companies should consider the ongoing need for employees to educate themselves so they can meet their professional and career goals.

Leaders can provide ample professional development opportunities. They can sponsor employees to attend conferences, bring in experts to give trainings and start a tuition reimbursement program. These steps show employees that leaders value their continuous development.

### 4. Consider COVID-19 And Remote Work Impacts To Culture

The COVID-19 pandemic brought unprecedented challenges to the business world, particularly to organizational culture. Remote work became the norm, leading to concerns about the emergence of siloed cultures and the feeling of exclusion among remote workers. Addressing these challenges requires innovative solutions that bridge the gap between physical and virtual workspaces.

Leaders can implement initiatives that foster a sense of belonging and connectivity among remote workers. Virtual team-building activities, and

regular use of communication channels and digital collaboration tools are essential for maintaining a positive culture in a remote work environment.

### 5. Hire And Dismiss According To Culture

Hiring individuals who align with the organization's culture is essential for long-term success. It's not just about skills – cultural fit should be a significant factor in the hiring process. Bring current team members to interviews, and let them ask questions about a candidate's ideal workplace. Ensure the hire will fit in well and that the role is right for them professionally.

Similarly, addressing cultural misalignments through the termination process is crucial to maintaining a cohesive and positive work environment. Firing someone is no easy task, but sometimes letting someone go is the best way to ensure both parties are getting their needs met. The most important point is to make sure everyone on the team aligns with the organization's core values.

### WHERE DO PEOS FIT INTO CLIENT COMPANY CULTURE?

PEOs play a pivotal role in shaping the HR landscape for their worksite employees. Understanding a client's culture helps PEOs align HR practices for a seamless integration of services, contributing to

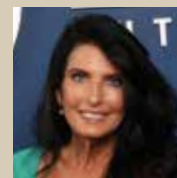
overall organizational success. PEOs that prioritize cultural alignment can positively impact employee engagement, retention, and client satisfaction.

By defining culture and being proactive in establishing a positive workplace, organizations can attract and retain top talent, foster innovation and ultimately drive growth. PEOs must acknowledge and value company culture as a commitment to creating thriving, collaborative workplaces.

### KEY TAKEAWAYS:

- **Leadership's role in company culture:** Defining culture and core values helps employees succeed.
- **Strategies for a positive culture:** Identify core values, promote open communication, provide professional development opportunities, consider pandemic impacts on culture, hire and dismiss according to culture. ■

- 1 <https://arbinger.com/blog/the-ultimate-list-of-corporate-culture-statistics/>
- 2 <https://www.gallup.com/workplace/349484/state-of-the-global-workplace-2022-report.aspx>
- 3 <https://www.zavvy.io/blog/employee-feedback-statistics>



**HEATHER KEEFER SAULSBURY**

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





# WORKPLACE CULTURE: HOW TO SET AN EFFECTIVE STRATEGY AND BUILD UPON IT

ANGIE GARCIA

In October of 2023, FrankCrum published a Culture Code to its nearly 500 employees, the most comprehensive work undertaken by the company on the topic of culture to date. FrankCrum is rooted in a family culture, with a history that dates back more than 40 years when Frank Crum, Jr. and his late father Frank Crum, Sr. founded their first company in 1981, a staffing firm. Three more companies would be added to the Crum enterprise in the 35+ years to come, a PEO in 1986, an insurance carrier in 2003, and an insurance agency in 2008.

In the early years, these companies were small, and it was relatively easy to foster a family culture with a value system that reflected the Crum family's personal values. But a decade or so into the 2000's as the Crum family enterprise grew, and the number of employees increased exponentially, maintaining a strong culture became more challenging. How can employees understand and experience company culture when they are part of a large, distributed workforce? What can business leaders draw upon to foster and reinforce positive

culture attributes? How can a company set the stage for ongoing change and culture improvements?

Formalizing our Culture Code helped us answer these questions.

### WHY CULTURE STRATEGY IS IMPORTANT

People are at the heart of a service business like a PEO, and you too can foster a “win-win” scenario for both your employees and your customers by cultivating an engaged, inspired and connected workforce.

Culture will happen even if you do not work at it, but the result is a gamble. For FrankCrum, dramatic growth meant that its strong family culture could become diluted by sub-cultures and variations in management styles. Also, the increase in remote work sparked by COVID and employee preferences made it harder than ever to “experience” culture. It became more important to formalize a culture code so that everyone has useful references, and to set a “call to action” for each person to take responsibility for contributing to the culture in positive ways.

A positive culture gives your team a sense of belonging, purpose, and well-being. A strong culture could also cause a person to “opt-out” if they do not believe or want to belong. And while this may be hard to swallow, it makes it easier to achieve culture fit when your culture is well-defined and aligned with day-to-day experiences designed to serve your customers and your employees.

### WHERE DO YOU START?

Start small and be authentic. Our culture work started over 10 years ago by developing two simple elements:

1. Our Values which we call Brand Pillars
  - You must come by these honestly. For us it was easy because we have a family culture, and the Crum family has a strong set of values that permeated a “family” culture already. Our value system consists of Integrity, Affinity, and Prosperity.
2. Our Brand Promise
  - We knew as a PEO we lift businesses up, and make them



stronger, so this led to a simple brand promise statement, “We promise to help businesses be the best that they can be.”

Once you have foundational culture work completed, find ways to embed culture statements and reinforcements into your everyday culture. Here are ways we did this:

- Lanyards printed with our brand pillars.
- Word walls with phrases that align with our purpose.
- Video testimonials about culture showcasing people from every level of the organization.
- We instituted “Pillar” awards to recognize people who exhibit our cultural values in their work.

### TUNE INTO YOUR EMPLOYEES ROUTINELY

You cannot assume that your employees experience the culture you aspire to create, so it’s important to collect feedback. For almost 15 years, we have participated in a third party employee satisfaction survey as part of a Tampa Bay Times Top Places to Work program. The need for better communication was an early theme we heard from our employees, which we addressed in many ways including Town Hall meetings, newsletters, and timely intranet posts.

We also heard that employees want more flexibility to work from home. A family culture is extremely difficult to maintain when people do not come together in person, so this introduced a significant challenge for us. While we did

extend much more flexibility to work from home, we still unapologetically communicate our preference for “in-office work whenever practical” in our culture code. It’s authentic to our family culture, and thus it must be acknowledged.

### BUILD UPON CULTURE STATEMENTS OVER TIME

Beyond the foundational culture work, it is important to continuously consider how your culture is aligned (or not) with your business practices, by asking a few questions:

- How can your culture instill greater “purpose” in employees?
- What attributes in people do you want your culture to attract?
- What about fun, information transparency and pay philosophies?
- What do you want to discourage?
- When you can answer these questions for your company, formalizing statements about each topic will paint a clear picture of company culture for employees and even prospective new hires. And while our full Culture Code at FrankCrum is very new, our hope is that it will be a resource to every team member to help us all sustain a positive culture, and course correct if culture experiences are out of alignment.

### WALK THE TALK

Culture begins and ends at the top, meaning that leadership sets culture and then must do the important work of reinforcing or stopping behaviors and practices to support it. Talk about “upping

the ante” on culture accountability! Once you’ve cracked the code to identify some of your culture attributes, you too can set a culture strategy for success. If you do it well, you will retain and attract a workforce that is highly engaged in your mission.

I’ll end by noting that at FrankCrum culture work is incredibly easy because we have a very kind and soulful owner. At the age of 74 Frank Crum, Jr. still walks the halls of his company, greeting employees and sharing a thought or two about football or current events. He recognizes people and milestone accomplishments in quarterly Town Hall meetings, and he draws on his faith and his experiences as a former preacher to deliver inspirational speeches every chance he gets, never shying away from his love of The Heavenly Father, but always with acknowledgement and respect for people with different belief systems. His themes include having a service disposition, humility, believing in oneself, and doing the right things for the right reasons – even when no one is looking. He is humble, he is wired to serve his clients and his people, and he knows his company cannot succeed without the contributions of each and every person. ■

<sup>1</sup> FrankCrum culture code  
<https://drive.google.com/file/d/1Lv8hQVv6Fabc1QKdKyxxbbCcz3sJrwCw/view2>



**ANGIE GARCIA**

*VP, Marketing  
FrankCrum  
Clearwater, FL*

EMPLOYEE ENGAGEMENT

# THE ROLE OF COMPANY VALUES

CONTINUOUS  
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CORPORATION

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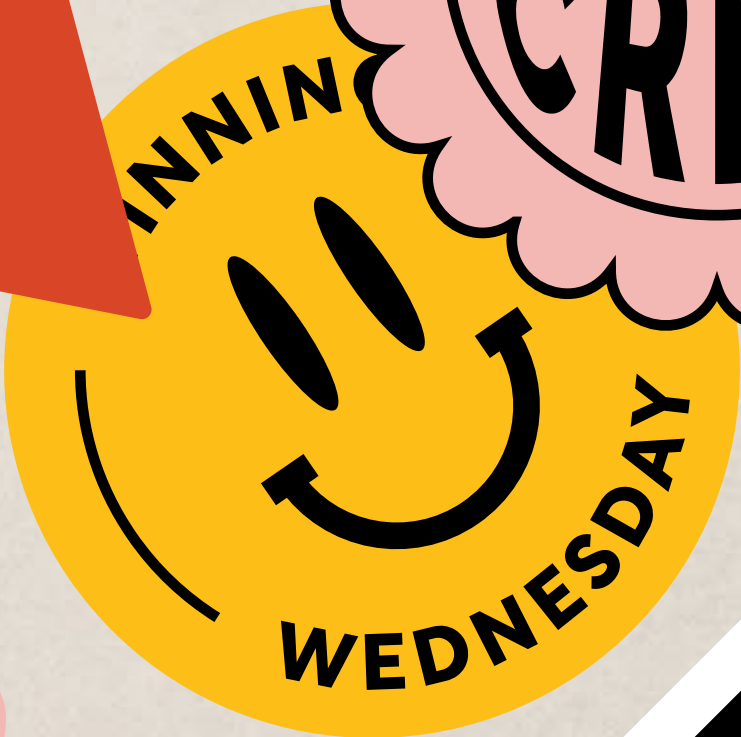
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EMPLOYEES

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# FROM THREATENING TO THRIVING: MY WORKPLACE CULTURE STORY

BY J. ROSE, ACCOUNT ANALYST, AND SHER SHIELDS, MARKETING COORDINATOR, STRATUS HR

If you had asked me ten years ago about the importance of having a positive workplace culture, I would have laughed out loud. Why would an employer proactively focus on the employee experience when margins were tight for their product or service?

Had somebody tried explaining to my accounting self that company culture was key to improving a company's bottom line, I would have rolled my eyes. Pseudoscience, folklore, fantasy – call it what you want, it was all just theory, right?

## THE TOXIC WORK CULTURE I KNEW

Sometime after college, I landed a position in the accounting department of a security company where I worked for the next 12 years. But as I worked my way up, I eventually had a manager who, over time, used me as a scapegoat to unload his stress.

At some point, this security company partnered with a PEO for their outsourcing services. I remember their team came in with such positive energy. They were genuine with the way they talked to us, they believed their product would truly help our company, and overall, they were just kind.

With this PEO handling all the administrative tasks in the background, I didn't

really know they were there – other than they were handling our tax filings. My personal interactions with them had been limited to this initial onboarding experience.

Until I caught COVID.

I was the first one in my office to catch COVID-19, so I was told to contact Stratus HR, our PEO. When I called in, everyone I talked to was so helpful. They knew what needed to be done and which forms I needed to complete so I could still get paid. These people took something that was so scary in the middle of a pandemic and put me at complete ease.

About a year after this, our management team decided to part ways with Stratus and brought things in-house. Unfortunately, I didn't have any power or sway to maintain that relationship.

From here, my boss got progressively worse with the yelling. It was a cycle of emotional abuse where he would scream at me and then later apologize to smooth things out – over and over. I went to the owners for help, but he was the CFO. Whatever they said to him would create a temporary change to where he almost seemed apologetic. But then he would slip back into this toxic cycle again, only worse than it was before.

Things finally got to the point that I dreaded waking up to go to work. Even though I needed a job and had no secondary plan, the money just wasn't worth it anymore.

As I considered my options, I remembered my interactions with Stratus. I knew their employees were friendly and the company had been in business for a while. After doing some research, I decided that whatever it took, I had to get my foot in the door.

I applied for every position they had available, even though I wasn't qualified for most. Thankfully, the perfect position in their accounting department opened up and I was hired.

## DISCOVERING A POSITIVE WORKPLACE CULTURE

My first few days at Stratus were eye-opening and invigorating. They held an all-hands meeting called Winning Wednesday where I was blown away! It was all I could do to sit there and soak it all in.

They started off with celebrating birthdays and work anniversaries, showed us graphs and statistics, and then opened it up for people to share their "wins" for the month. Nearly everyone chimed in with compliments about coworkers – from



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their own firsthand experiences to great things clients had shared over the last few weeks. It was a downpour of tributes! The meeting ended with an announcement for employee-of-the-month, which is a story of its own, and then everyone ate a company-sponsored breakfast together.

There was so much positivity said and expressed and encouraged, I almost cried. It was amazing! In all my former work experiences, an all-hands meeting meant there were fires to put out or we had done something wrong. It was nothing like this experience.

#### **HOW MY FIRST MISTAKE WAS HANDLED**

While I'd like to say I rode off into the sunset and everything was perfect, I'm still human. The first mistake I made was a reconciliation error, and I knew I had to tell my new boss – who was, once again, the CFO. I immediately felt anxious about how this conversation might go.

I walked into her office feeling extremely apologetic, prepping myself to be yelled at.

I explained what had happened but was caught completely off guard by her response. There was no yelling! Instead, she told me that mistakes happen, that this was no big deal, and that we could fix it. She was so understanding and kind, I couldn't believe it!

My boss then showed me how to do the reconciliation correctly going forward. I'm not sure how well I hid my shock when comparing my previous work experiences to what was happening at that moment, but I was once again unbelievably reassured that I was in the right place.

#### **MY NEW UNDERSTANDING OF HOW WORKPLACE CULTURE BOOSTS THE BOTTOM LINE**

Having been with Stratus for nearly two years now, I could go on and on about the workplace culture here. I'll simply say it oozes with positivity, and it's addicting. My personal health is so much better, and I wake up excited to see my

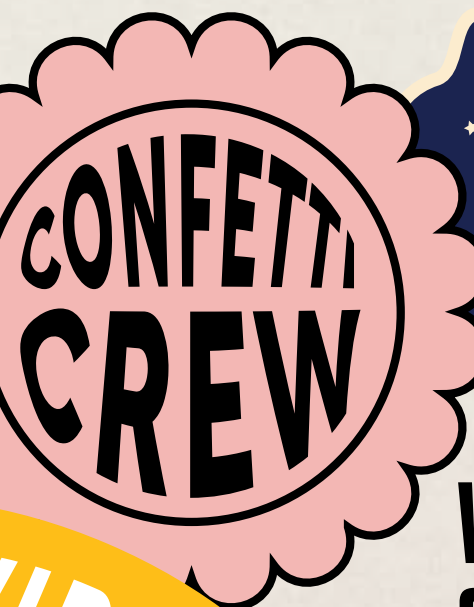
coworkers. I never imagined a work environment like this could exist.

While I still spend my work time crunching numbers, I've learned this: there IS monetary value behind positive workplace culture.

Not only is it incredibly rewarding to work for a company whose leaders value and respect their employees, and where coworkers look for the good in each other, but all of this nurtures loyalty. Loyalty translates into employee tenure, which means lower employee turnover. The lower your turnover, the higher your bottom line. And when employees are loyal to a company and love what they do, that seeps into positive interactions with others – vendors, clients, customers, the public – all of which impact the bottom line.

Despite being a numbers person and having a hard time quantifying it, my experience has taught me firsthand that workplace culture matters. And it goes much deeper than accolades. ■





# WEAVING COMPANY VALUES INTO STRATEGIC INITIATIVES TO CREATE A DESTINATION WORKPLACE

BY MICHELLE MIKESSELL

**W**hen one-third of your life is spent at the office, work should be fulfilling. At G&A Partners, we know that our employees are the heart and soul of all we do, so we focus on ensuring this is a destination workplace where people want to work, not have to work.

What's the difference between a workplace and a destination workplace? Is it the work? The space? The people? It starts with establishing values that are more than words on a page or a poster in the hall. Employees should see those values in action daily. Our values, such as putting people first and leading by example, are tied to everything we do.

Values that are firmly ingrained into our culture is only the first step. Success in the PEO industry requires the best of the best, so here's how we dedicate our efforts to ensure G&A Partners is an employee destination.

**Empowering employees to make a difference.** We established and promote six employee resource groups (ERGs) that focus on meeting people where they are and giving them

a space to collaborate on common interests and initiatives. Our ERGs include:

- With Women, dedicated to issues impacting women.
- Younify, dedicated to providing a space to come together to deepen the understanding of what makes each of us unique by building community, educating, and connecting.
- Helping Hands, an employee-led philanthropic service team.
- Serve, our phenomenal Veteran's team.
- Wellness Warriors, committed to empowering employees to improve their overall health.
- Confetti Crew, responsible for hosting events that ignite our amazing workplace culture.

**A collaborative environment where every voice matters.** We actively solicit feedback from our employees to address issues and create an even better place to work, which we measure by employee Net Promoter scores, stay interviews, exit





## What's the difference between a workplace and a destination workplace? Is it the work? The space? The people? It starts with establishing values that are more than words on a page or a poster in the hall.

interviews, Glassdoor reviews, biannual employee surveys, and annual leadership assessments. It only matters when you share those results – so we do so with all employees on a regular cadence.

**Provide tools, training, and support for employees.** We believe that continuous learning is the key to success, so we've developed a platform with tools to empower and inspire every member of our organization with the creation of G&A University. Every employee receives over 40 hours of individual training along with micro and instructor-led training programs that support each individual's personal and career goals.

**Provide great benefits and a meaningful career path.** At G&A we know an investment in our people is an investment in the future, so we established a structure for employees to grow from entry-level positions to roles with

increasing levels of responsibility. Our benefits offerings place a strong focus on the whole person and include physical, financial, emotional, and social wellness programs.

**Rewarding individual and team performance.** We start with key performance indicators and not only measure but celebrate successes throughout the company by recognizing service excellence, servant leadership, and employees who demonstrate our values and provide phenomenal customer service.

**Offer a flexible work environment.** Recent years have presented all of us a shift in the world of work, for G&A Partners, the hybrid work model best supports our commitment to be a destination workplace.

Within each of these strategies, our company values are woven throughout. These great programs put people first,

demonstrate our leadership, and encourage communication and collaboration.

Alone, these initiatives don't make a destination workplace. Rather these initiatives intertwine with our values to create a workplace that embodies our values in everything we do, encompasses who we want to be, and connects our employees to something greater than just the work on a computer screen.

These programs and approach work well for G&A, but the blueprint to a destination workplace isn't the same for every company. Businesses must champion what's unique about their companies through their own engagement initiatives and strategies.

There's no avoiding it: a company's competitive advantage is determined by its people. Therefore, it is imperative to find the right talent and recognize and retain top performers. But you can only do that if you remember employees want to feel valued and connected to the work they perform.

The bottom line for any business: significantly improving your people practices can create a measurable impact in shareholder value. And building a workplace people want to be a part of – quite frankly, that's a lot more fun! ■



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# ELEVATING ENGA

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# ENGAGEMENT

## LIFTING BUSINESS SUCCESS BY ELEVATING EMPLOYEE ENGAGEMENT

BY BETH SUNSHINE

**E**mployee engagement is a hot topic these days. We often hear great leaders talking about the importance of engagement, saying things like, “I could never grow my business if my people weren’t engaged.”

We all know employee engagement is important, but unfortunately, that’s not enough. Making it happen is the hard part!

Recent Gallup research shows that only 32% of employees are engaged in their work today. That leaves a lot of disengaged employees who will each cost their companies a minimum of \$2,246 yearly. Even worse, 65% of them plan to remain in their roles and continue to drag down their organizations in the coming year.

If we all know how important it is that our employees are engaged, why is disengagement at an all-time high?

In short, we are focusing on the wrong things.

Company leaders who want to increase employee engagement often confuse engagement with fun. With good intentions, they choose the wrong path and sink their time, money, and energy into failing efforts like picnics, puppies, and ping pong. While those things may be fun to the team, they don’t elevate engagement or make employees feel fulfilled. And they leave business leaders frustrated with their lack of results.

So, if “fun” won’t cut it, what is employee engagement, and how can an organization create it?

### WHAT IS ENGAGEMENT?

At Up Your Culture, we define employee engagement as an emotional commitment and willingness to give your best at work. When employees are engaged, they give discretionary effort and go the extra mile, which drives business results.

According to Forbes, highly engaged teams show 21% greater profitability, 41% reduction in absenteeism, and 59% less turnover.

### HOW TO ELEVATE EMPLOYEE ENGAGEMENT: THE FOUR ENGAGEMENT ELEVATORS

We have found four distinct ways to lift employee engagement, and we call them the four engagement elevators: shared mission, people development, valued voice, and earned trust. Companies committed to increasing engagement can use the actionable strategies associated with the engagement elevators to achieve measurable results.

#### SHARED MISSION

The foundation of a strong culture is its shared mission. Organizations with highly engaged employees have a clear sense of who they are, where they are going as a company, and why they are working so hard to get there.

Their employees understand the mission because company leaders have communicated it well, so every employee feels they are a part of something bigger

than themselves. Employees know where they’ve been as a team, where they are today, and where they’re headed in the future, and as a result, they feel as though they are on the journey together.

Companies with a strong shared mission also attract higher quality job candidates with the passion and energy to join the quest and help carry the load. This creates the momentum needed to take the company to the next level.

Pro-Tips:

- Define your vision. Look into your crystal ball and ask yourself what you see for your team or organization this time next year. How about in 3 years? Or 5? Describe that vision for all your employees so they can see it, too.
- Define your purpose or reason for being. Work together with your leadership team to create a succinct statement that explains why your people show up and work so hard day after day. My company’s reason for being is to increase productivity by elevating engagement. That gets all of us out of bed every day regardless of the role we play in the organization.
- Define your core values. How should employees treat customers and each other? What behaviors will be celebrated on this mission?

#### PEOPLE DEVELOPMENT

Spend some time observing companies with thriving cultures, and you’ll find



managers who are great at hiring the right people, setting them up for success, and developing them to reach their full potential.

Here's how these people development champions pave the way for strong employee engagement:

- They know that every employee has different workstyles, communication preferences, and motivators - and they manage them accordingly.
- They make sure to understand the unique strengths and weaknesses of each direct report so they can develop and leverage their talents.
- They consistently communicate their expectations, so every employee knows exactly what success looks like.
- They provide consistent and meaningful feedback on what their people are doing well so they can repeat those successful behaviors.
- They consistently recognize good work.

**Pro-Tip:** Select one item from the list above and commit to using it consistently. Once you have built that habit, select your next item and keep that rolling until you see your people growing in their jobs and feeling more engaged at work.

### VALUED VOICE

Companies with great cultures value their people and respect their opinions. Their employees report that their leaders actively share information with them and often seek to understand their perspectives. It seems their managers strike a healthy balance between listening and leading, making it clear that while every employee will not always have a vote, they will always have a voice.

This is important because when people are valued in this way, they feel like they are on the inside, part of the solution, and even a partner in the success. They have more ownership in their work and are more likely to share information, ideas, and concerns they may not have revealed otherwise. This level of “psychological safety” generates a steady flow of innovative ideas and improvements and also gives company leaders valuable insight into potential obstacles ahead so they can avoid them.

**Pro Tips:**

- Consider communication as cyclical, consistently sharing out so that they will share in.
- Demonstrate that you value your employees by seeking their opinions regularly, asking good questions, and actively listening.
- Eliminate judgment.

Consider how you can use skip-level meetings this year. These are one-on-one conversations between employee and a senior manager who is not their direct supervisor. The purpose is to gain insight into what's happening in the organization from the employee's perspective and provide the employee with the opportunity to ask questions and gain useful insights.

### EARNED TRUST

Trust is fundamental to high performance in any organization and essential to employee engagement. Leaders with the strongest cultures demonstrate integrity and promote transparency, which gives their employees confidence in their decisions.

In a recent Gallup poll, only 17% of people said their company leaders had “high” or “very high” levels of honesty and integrity. That lack of trust in leaders becomes a lack of employee engagement, which limits the organization's success.

**Pro Tip:** Commit to:

- Doing the right thing because it's the right thing to do.
- Communicating your commitment to your people through both words and actions.
- Putting the needs of your people ahead of your own.
- Establishing a “speak up” culture, encouraging candor, and showing appreciation for honest, accurate input.
- Demonstrating character by holding yourself and others accountable for the company values.
- Refusing to tolerate behaviors that don't align with those values.

These four engagement elevators will lift your engagement, but it's not as easy as pressing a button and stepping on for a smooth ride. This takes consistent focus and effort, but trust me, it's worth your time and energy. Not only will your employees show up each Monday ready to tackle the week, but you will earn a strong ROI in everything you put into this.

When engagement is strong, employees have a powerful sense of purpose, and they feel as though they have a stake in the game. As a result, they go above and beyond what others are doing, willing to give everything they've got to achieve success. This leads to measurable success, increasing revenue, retention, and profitability.

So, what strategies can you use to elevate your employee engagement this year? ■



**BETH SUNSHINE**

*SVP Talent & Up Your Culture  
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# MEET NAPEO'S NEW PRESIDENT & CEO CASEY CLARK

**I**n December, Casey Clark officially joined the NAPEO team as the association's new president and CEO. He brings 25 years of experience to the role with a background in strategy and communication consulting and association management. He spoke with PEO Insider® about his past experiences, lessons he has learned, and what excites him about the PEO industry.

**PEO INSIDER:** You have a lot of experience in the association industry. Besides NAPEO, what other industry associations have you worked for?

**Casey Clark:** My first paying job was as an intern for the American Trucking Associations in high school. Since then I've been fortunate to work for several associations directly - the U.S. Chamber

of Commerce, the American Chemistry Council and, most recently, the American Gaming Association – and represent others in my consulting practice.

**PEO INSIDER:** What was your role like at the American Gaming Association (AGA)?

**Casey Clark:** I was initially recruited to AGA to lead communications and research, but the role grew into also leading organizational strategy, responsibility programs, and strategic partnerships. I was also the chief spokesperson during a time of unprecedented growth for the gaming industry.

**PEO INSIDER:** It sounds like an exciting role especially since you saw the gaming industry grow in popularity quite a bit. What was that like?



*What I'm most excited about is meeting all the leaders throughout the industry, listening to what matters to them, and putting the plan in place to move the needle.*

**Casey Clark:** It was like lightning in a bottle. Especially with the widespread legalization of sports betting. When I got to AGA, sports betting was only legal in Nevada. Six years later, when I left, it's now legal in 38 states and Washington, D.C.



Casey Clark meets with PEO champions in Congress: Rep. Suzan DelBene (D-WA) and Rep. Erin Houchin (R-IN)

**PEO INSIDER:** What sparked this sudden growth?

**Casey Clark:** In May of 2018, The Supreme Court issued its ruling in *Murphy v. NCAA* which effectively allowed states to determine whether they wanted to authorize sports gambling. As the representatives of gaming companies, we were obviously supportive, but many of the stakeholders involved now, including media companies and major sports leagues, were not. I spent a significant amount of time educating those entities and building strong relationships to benefit everyone in the sports betting ecosystem. After all, sports betting is most popular among young, avid sports fans, and those who bet on sports spend more time with the content, which is exactly what leagues and media companies are looking for.

**PEO INSIDER:** How did you do this?

**Casey Clark:** A big part of our efforts was the “Have A Game Plan.® Bet Responsibly.™” public service campaign we launched. It was a ton of work, but it created momentum for partnerships and alignment around core principles and messaging for everyone involved in sports betting. It put responsibility at the center of everything we talked about, and I’m really proud of it.

**PEO INSIDER:** Why do you think communication campaigns like this are important? How are they effective?

**Casey Clark:** You have to think beyond clicks, shares and media hits. You have to leverage communication campaigns to advance core industry and association priorities. For example, AGA would put out betting projections ahead of the Super

Bowl or March Madness, but it wasn’t just to generate coverage of the numbers, it was to create a platform to discuss responsible gaming. And it worked.

**PEO INSIDER:** You also had to deal with the impact of COVID while at AGA. Casinos were hit especially hard. What did you take away from this experience?

**Casey Clark:** You’re right about the impact of COVID shutdowns. Nearly 1,000 casinos were completely shut down almost overnight and it was devastating for our members and their employees. But we really stepped up, ensuring the gaming industry was included in pandemic relief measures, when we had been carved out of every other government relief measure in the history of our industry. I think the pandemic revealed the real value of a trade association.



**PEO INSIDER:** How so?

**Casey Clark:** Our members saw us, in real time, on the frontlines fighting for their businesses and delivering meaningful results. It created a way for members to really feel the value of membership in new ways. In a lot of ways, it proved the business case for trade associations in general, demonstrating the importance of an industry working together to achieve common goals.

**PEO INSIDER:** It seems like gaming companies and casinos might be quite different from PEOs. Do the industries have anything in common?

**Casey Clark:** Actually, one of the things I learned during the search process is that there are actually a lot of similarities.

**PEO INSIDER:** In what ways?

**Casey Clark:** First off, both industries are heavily regulated by a patchwork of state licensing and regulatory regimes. Plus, we also engaged with many of the same federal agencies like the Treasury Department.

**PEO INSIDER:** What else have you learned that prepared you for this role?

**Casey Clark:** I think what I'm most proud of from an association management standpoint is having built strong, high performing teams. It isn't just about finding the right professionals for each job (or inheriting them as I've been fortunate to do here at NAPEO), it is about finding ways to leverage each contributor's unique skillset to make the team stronger. I want everyone to play team ball because when we're all pulling

in the same direction, our members see greater return on their investment in us and we have more fun coming to work every day.

**PEO INSIDER:** What appealed to you about joining NAPEO?

**Casey Clark:** The first thing was the team and culture. The longer you're in Washington the smaller the town gets. Having known Pat for a long time, I knew that any place that he was a part of for so long had to be full of good people! And the more I learned about the industry, the more I had the opportunity to interact with the leaders on the search committee, the more excited I got about being a part of this dynamic, growing industry. Secondly, I have always been attracted to a good challenge. As our industry continues to evolve, NAPEO will play an important role in leaning into policy challenges and proactive opportunities and identifying ways we can enhance the business environment for our industry and the businesses we serve. That's an exciting prospect for any association executive.

**PEO INSIDER:** What excites or inspires you about the PEO industry?

**Casey Clark:** I am blown away by what our members are doing to enable small business to thrive. I strongly believe in the power of free enterprise, and being a part of an industry dedicated to empowering entrepreneurs and business leaders to focus on their core businesses is inspiring.

**PEO INSIDER:** What are you most looking forward to this year?

**Casey Clark:** I have a lot to learn, which is exciting. But what I'm most excited about is meeting all the leaders throughout the industry, listening to what matters to them, and putting the plan in place to move the needle. A former employer had a great tag line that I think really defines the role of an effective association: protect and enhance enterprise value. Finding ways to do that effectively is the fun part.



*I am blown away by what our members are doing to enable small business to thrive.*

**PEO INSIDER:** Work is not everything of course. Outside of the office, what your interests and hobbies?

**Casey Clark:** Well, my wife and sister both run trade associations, so you'd be surprised how much time our family spends thinking and talking about work outside of traditional office hours (we may need a better hobby!). We have three kids that span a wide age range (22, 16 and 10) who keep us pretty busy. When we can, we prioritize travel, taking in as much live music as we can, and maximizing time on/around the water. I'm also very active with my alma mater (the University of Dayton), where my wife and I guest lecture and stay involved as much as possible. ■

# Don't Miss Out on NAPEO's 2024 Events!

## Risk Management Workshop

**April 22nd-23rd, 2024, Westin Indianapolis, Indianapolis, IN**

*NAPEO's Risk Management Workshop has evolved into the largest gathering of PEO risk management professionals, carriers, brokers, and agents. Nowhere else will you find the PEO industry's top risk managers, key insurance executives, regulatory experts, and policy makers gathered for such an in depth look at PEOs and workers' compensation.*

## PEO Capitol Summit

**May 21st-23rd, 2024, The Ritz Carlton, Pentagon City, Arlington, VA**

*Attend NAPEO's 2024 PEO Capitol Summit for policy discussions, legal analysis, and lobbying opportunities. Highlights of the conference include a chance to celebrate National PEO Week in DC, PEO Advocacy Day on Capitol Hill, industry expert discussions on PEO industry hot topics that deliver practical information, a chance to ask the experts your burning questions, and hear from leading lawmakers and policy gurus.*

## CFO & Payroll Seminar

**July 23rd-24th, 2024, Louisville Marriott Downtown, Louisville, KY**

*Sessions will include accounting and financial practical insight from the experts which CFO types can apply to successfully managing their PEO's finances and operations during the CFO track. PEO payroll attendees will have their own track with practical advice on what is happening on the PEO payroll front. The group will come together for general sessions, the roundtables, and all networking functions.*

## Annual Conference & Marketplace

**September 16th-18th, 2024, JW Marriott Orlando, Grande Lakes, Orlando, FL**

*NAPEO24 will be THE place to be! You won't want to miss the classroom learning by PEO content area complemented by interactive discussion forums, a comprehensive trade show, and valuable networking events. It's a must-attend event for all PEO professionals and industry vendors.*



# PEOS IN THE COMMUNITY: NEMR TOTAL HR: BUILDING COMMUNITY IN MORE WAYS THAN ONE

BY EVAN FALLOR

For NEMR Total HR, volunteering has created a stronger South Jersey community — and a stronger team.

Giving back at the local level is a cause personal to NEMR Total HR President Steve Sweeney, who grew up within earshot of the company’s Marlton headquarters and is a lifelong resident of the greater Philadelphia area.

Leadership including Sweeney has long been active in volunteering and mentoring opportunities, a core tenet of NEMR Total HR’s identity. Each year, NEMR Total HR “adopts” a family through Volunteers of America’s Adopt-a-Family program that ensures one local disadvantaged family will have a joyous holiday season.

Over the years, they spent countless hours mentoring area youth in educational and professional topics and providing food assistance to an area with pockets of middle and upper middle class, but also neighborhoods that face significant socioeconomic challenges.



The NEMR Total HR team packs food boxes at a local food pantry.

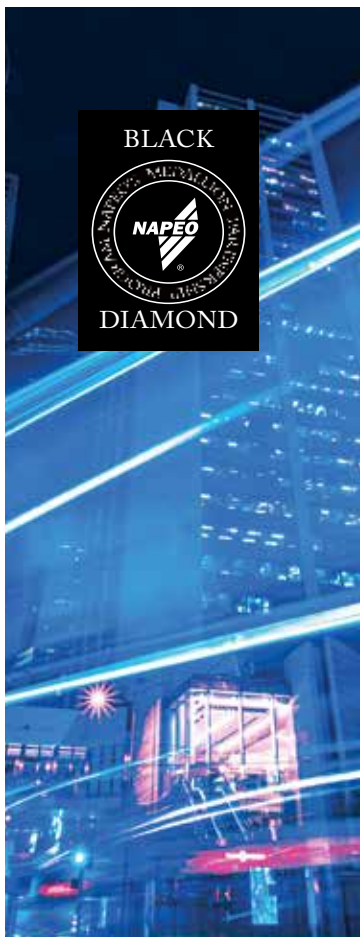




*The organic drive to give back has morphed into a three-person committee of employees from different levels, all of whom get a say of where NEMR should focus its next volunteering efforts.*

Those at the top noticed that the rest of the inquisitive and growing 35-person staff too was interested in giving back.

So, they put their heads together and created a formal volunteering incentive policy, one that has become a win-win for the community and employees alike.



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Employees now come up with their own volunteering ideas that they are free to pursue during normal work hours. For



The team hosts a resume writing workshop

every volunteering stint, employees earn several hours of PTO, accruing up to two additional PTO days per year. It's been a hit, Sweeney says, with roughly 80% of employees now volunteering in some capacity.

"The PTO incentive is what we thought would be a driving factor," Sweeney said. "But it's taken a backseat because everybody likes to volunteer together for causes they are passionate about."

"Everybody loves doing this," he added. "It really brings a lot of internal joy to a team that is all good-hearted."

This includes volunteering at the local YMCA, mentoring area schoolchildren, or serving up meals at Cathedral Kitchen in nearby Camden. The team has held resume writing workshops, provided food and supplies for those in need during the holiday season, and diversified its community service portfolio as its efforts have expanded. They've also been active in partnering with local nonprofit BookSmiles to gather and distribute books to schools and children in area "book deserts."

NEMR Total HR also takes care of its own around the holidays - each employee has been given a Thanksgiving pie to share with family for 15 years and counting.

The organic drive to give back has morphed into a three-person committee of employees from different levels, all of whom get a say of where NEMR should focus its next volunteering efforts.

The result, Sweeney says: a stronger organization.

"It's been great cross-departmental collaboration for teams that perhaps work with each other but don't socialize much," he said. "Doing volunteering activities together has really created a more collaborative team."

To celebrate its 25th anniversary, NEMR HR in 2023 set a goal of 200 hours of collective community service, one it achieved by November — even before the holiday season. The 35-person firm had dedicated 220 volunteer hours and counting as of early December, a total head and shoulders above that of years past.

Most recently as part of its annual Volunteers of America efforts, the team adopted a local family who experienced significant trauma, gifting their children meaningful items from a wish list as well as meals and gift cards for their mother. That family was brought together this past holiday season just as the NEMR Total HR team has been brought closer together from its collective desire to give back.

"We're not just donating money to a national cause and not seeing where it goes," Sweeney said. "You can see that big impact in our community. We're proud to be there for our neighbors that need help." ■



**EVAN FALLOR**

Director, Communications  
NAPEO  
Alexandria, VA



By November, the NEMR Total HR team surpassed its goal of 200 collective volunteering hours in 2023.

# HOW A PEO CAN BENEFIT FROM A SOC EXAMINATION

BY JASON F. CLAUSEN

**A** System and Organization Controls (SOC) examination, is an audit of the controls and processes implemented by a service organization to ensure the security, availability, processing integrity, confidentiality, and privacy of the data it processes. These examinations are conducted by independent third-party auditors and are based on standards developed by the American Institute of Certified Public Accountants (AICPA). The results of SOC examinations are provided in a SOC report, which includes an independent opinion report, management's assertions, a description of the system, testing procedures and the results of the testing.

There are three main types of SOC Examinations, each of which has a different focus:

A SOC 1 examination provides independent assurance about the effectiveness of a service organization's internal controls relevant to financial reporting. SOC 1 examination reports are typically required by organizations that outsource

key business processes to service providers, where those processes impact the financial statements of the client organization. These service providers are often referred to as "service organizations."

Typical industries that obtain SOC 1 Examinations are:

- Payroll processing providers.
- Financial transaction processors.
- Third-party administrators (TPAs).
- Employee benefit plan administrators.
- Data centers and cloud service providers.

A SOC 2 examination assesses a service organization's controls related to the security, availability, processing integrity, confidentiality, and privacy of information. SOC 2 examination reports are typically by those vendors that handle sensitive information.

Typical industries that obtain SOC 2 Examinations are:

- Software-as-a-Service (SaaS), cloud service, and other technology solution providers.
- Data centers and hosting providers.
- Healthcare organizations
- Payment processors
- Legal and other professional service firms.



*The nature of services a PEO provides involve handling sensitive, personal employee data, and financial data. A SOC examination can benefit a PEO in many ways.*

Both SOC 1 and SOC 2 examinations may be either a Type I or Type II report. Type I reports on the suitability of design of controls and Type II reports cover the operational effectiveness of controls.

SOC 3 examination provides a summary report that is used to communicate the organization's commitment to information security and privacy to a broader audience. This type of report is generally used for marketing purposes.

## LEGAL, LEGISLATIVE, & REGULATORY

For the purposes of this article, we'll primarily focus on SOC 1 and SOC 2, due to the highly summarized nature of the SOC 3.

So, now that we've covered what SOC examinations are, how can a PEO benefit from undergoing one?

The nature of services a PEO provides involve handling sensitive, personal employee data, and financial data. A SOC examination can benefit a PEO in many ways. A few examples of these benefits are:

### **Client Assurance:**

SOC 1 and SOC 2 examinations provide assurance to clients that the PEO has implemented and maintains effective controls over these processes, ensuring the accuracy and reliability of financial information.

### **Trust and Credibility:**

A SOC 1 examination demonstrates the PEO's commitment to maintaining strong internal controls, giving them confidence in the security and integrity of the PEO's services.

### **Competitive Advantage:**

SOC 1 and SOC 2 reports serve as a demonstration of the organization's commitment to security and reliability, providing a competitive edge over other PEOs.

### **Risk Mitigation:**

SOC examinations are geared toward identifying and assessing potential risks in the PEO's processes related to financial reporting (SOC 1), and information security practices (SOC 2). By undergoing a SOC 1 examination, the PEO can mitigate the chance of errors, fraud, deficiencies, material weaknesses in internal control, and other issues that could materially impact financial information (SOC 1), and can mitigate the likelihood of data breaches, unauthorized access, and other security incidents (SOC 2).

### **Compliance Assurance:**

A PEO may have attractive prospects in regulated industries that may require assurance that their service providers are in compliance with industry standards. A

SOC 1 report provides documented evidence of the PEO's commitment to and compliance with established controls, and opens doors to opportunities closed to other PEOs without SOC 1 reports.

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CRITERIA	SOC 1 EXAMINATION	SOC 2 EXAMINATION
Purpose	Accounting, Finance, Legal, Compliance, and Tax	Information security controls.
Focus	Payroll (including Payroll Support)	Information security controls and practices.
Report Types	Benefits	Type I (suitability of design), Type II (operational effectiveness)
Trust Service Criteria	Human Resources	Yes, includes security, availability, processing, integrity, confidentiality, and privacy.
Audience Accessibility	Information Technology	Typically restricted, shared with clients and partners.
Level of Detail	Internal Sales & Marketing/Customer Relations & Sales	Detailed report on controls.
Regulatory Compliance	Risk Management	Primarily addresses information security controls.
Common Users	CEO/Staff Not Assigned Above. Other General Office Support	Clients, business partners, stakeholders.
Global Recognition	Total Internal Employees	Globally recognized for information security.

**Compliance Adherence:**

For certain industries, SOC 2 compliance aligns with industry best practices and regulatory requirements related to data protection. Meeting these standards can help the PEO avoid legal complications and demonstrate compliance with applicable industry regulations.

**Operational Efficiency:**

SOC 1 and SOC 2 examinations can reveal opportunities to enhance and optimize its internal controls and processes. This can lead to improved operational efficiency, reduction of soft costs associated with inefficiency, and a reduction the risk of errors.

**Client Attraction:**

SOC 1 and SOC 2 reports can be a persuasive factor for attracting new clients who prioritize security and reliability in their HR and financial processes.

**Enhanced Internal Controls:**

The SOC 1 examination serves as a mechanism for the PEO to proactively assess and enhance its internal controls, leading to a more secure and resilient operational environment.

**Enhanced Data Security:**

SOC 2 examination focuses on information security controls, helping the PEO strengthen its safeguards for sensitive data such as employee information, payroll data, and benefits details.

**Enhanced Reputation:**

SOC 2 certifications can enhance the reputation of a PEO within the industry. It signals to clients, partners, and stakeholders that the organization places a high priority on maintaining the confidentiality and integrity of sensitive data.

**Global Market Access:**

SOC 2 certification is globally recognized and can facilitate market access on an

international scale. Many clients and partners, especially those in regulated industries, value the assurance provided by SOC 2 examinations.

See the table above to outline distinctions between SOC 1 and SOC 2 Examinations.

Currently there are no regulatory requirements for a PEO to have a SOC Examination. Obtaining a SOC certification is optional. While this is an optional certification, individual PEOs could experience significant benefits as previously described. The PEO industry, as a whole, would benefit by the quality, credibility, and further legitimization. ■



**JASON F. CLAUSEN**

President  
Jason F. Clausen, P.C.  
Fraser, MI

# AI WITHIN UI

BY K-ANN WILSON

**E**mbracing a systematic approach to problem-solving, I've always favored simplifying actions to ensure traceable and reproducible results. So when news of a futuristic tool capable of streamlining mundane, manual tasks and redirecting focus towards value-added client endeavors reached my ears, I was very excited. The promise of Artificial Intelligence (AI) in reshaping the landscape of business operations, particularly within the realm of unemployment insurance, is a prospect I find particularly compelling.

The upheaval brought about by the COVID-19 pandemic served as a stark wake-up call, underscoring the imperative to revamp the technological architecture underpinning pivotal programs. This year, I attended many industry conferences and was delighted to see that key players are actively exploring the integration of AI into the framework of unemployment insurance, sparking fervent discussions across industry platforms and drawing keen interest from governmental bodies. For many organizations, federal, and state agencies, proactive steps are being

taken to begin the conversation of how best to implement AI into unemployment insurance processes.

From my vantage point, the infusion of AI into the unemployment sector holds the key to unlocking a multitude of advantages that could revolutionize the efficiency, accuracy, and cost-effectiveness of unemployment insurance operations. These areas are very important to maintaining the integrity of the unemployment program, an aspect that undoubtedly resonates with the dedicated individuals immersed in the day-to-day intricacies of unemployment insurance operations. AI's potential lies in its capacity to ease the burden of manual processes and to counteract the talent drain that has been a consequence of recent industry disruptions within the realm of unemployment claims management.

In light of this, let's delve into specific areas where the integration of AI can potentially trigger a transformative ripple effect:

1. **Automated Document Processing:** Leveraging cutting-edge advancements in business rules and machine learning, states and PEOs can

automate the processing of essential documents, slashing manual efforts while expediting critical functions like adjudication and benefit calculations.

2. **Fraud Detection:** By harnessing the power of AI algorithms, the industry can fortify its defenses against fraudulent claims through the identification of suspicious patterns and irregularities, leading to a reduction in overall UI costs.
3. **Natural Language Processing for Communication:** By deploying AI-driven NLP algorithms, the industry can effectively analyze client communications, ensuring timely and tailored responses to inquiries.
4. **Workflow Automation:** AI streamlines routine tasks, empowering human resources to focus on complex cases and critical decision-making processes.
5. **Data Analytics and Reporting:** Real-time analytics generated by AI systems offer invaluable insights, facilitating informed decision-making and continuous process improvement.

6. Personalized Support: AI-driven personalized recommendations aid claimants in accessing reemployment services or training programs, expediting their return to the workforce.

From automated document processing to fraud detection and personalized support for claimants, the multifaceted applications of AI holds the key to streamlining operations, enhancing efficiency, and fortifying the integrity of

the unemployment insurance program. Amidst the excitement and anticipation, the overarching objective remains crystal clear - to bolster the industry's resilience and fortify its capacity to serve both claimants and stakeholders with unwavering efficiency and efficacy. As the industry prepares to embrace this transformative journey, the future of unemployment insurance stands poised to be redefined by the thoughtful integration of AI-driven solutions, heralding a new era of operational

excellence and client-centric service delivery. ■

- 1 <https://www.sciencedirect.com/science/article/pii/S0740624X22000946>
- 2 IT modernization strategy | U.S. Department of Labor, <https://www.dol.gov/agencies/eta/ui-modernization/blogs/2023-strategy>



**K-ANN WILSON**

*Director of Unemployment Insurance  
Justworks  
Plant City, FL*



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# INCREASE YOUR PROFITS AND AMPLIFY YOUR PERSONAL CUSTOMER CONNECTIONS THROUGH AUTOMATION

BY RYAN R. MOSSMAN

**H**uman-to-human interactions have always been what defined PEOs. Being a guiding hand to small and medium-sized businesses across the United States who lack the know-how or the willingness to deal with complex payroll, benefits, and HR regulations has allowed the PEO industry to thrive and provide an unparalleled level of personal touch to their customers. In the past, this “People First” philosophy was enough to keep you on top and drive growth.

However, with the digital transformation continuing to impact businesses of every size across every industry, businesses that rely heavily on human-to-human interactions – like PEOs – are seemingly faced with an either-or proposition: update your business practices with technology that drives efficiencies through automation – doing more with less – or focus on high-touch customer service.

What if you didn’t have to choose? What if you could do both: drive efficiencies in

your business, innovating with more technology, while also increasing your ability to provide the white-glove service that your customers are accustomed to and depend on? At first, doing both may sound impossible. Good news: not only can you do both, but you should. The alternative – focusing solely on one or the other – presents real dangers. If you completely ignore technological advancements (and the efficiencies that come with them) as they take place, you run the



risk of your business becoming stagnant or irrelevant. On the other hand, if you embrace every flashy, new tool as it's released, you may accidentally remove the human-to-human element and become unrecognizable to your customers.

All businesses must make choices about allocating capital, and PEOs are no different. Instead of choosing whether to invest in technology or build out your people team, do both. Implement technology into your business and increase the amount of personal touch you're able to

deliver to customers, harkening back to the lifeblood of your business and further differentiating yourself from your competitors. Carefully evaluate the biggest areas of potential and implement tools that can help eliminate time-consuming or tedious tasks. With more time available, your team can invest it back into your customers and forge long-term relationships. It is precisely this technological innovation that lets you redeploy resources to better serve the heartbeat of your business: your customer.



*All businesses must make choices about allocating capital, and PEOs are no different. Instead of choosing whether to invest in technology or build out your people team, do both.*

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**Expanding into a new state? Starting a new PEO? Need to check the UI rates for 2024? Look no further than NAPEO's Regulatory Database!**

NAPEO's comprehensive Regulatory Database provides up-to-date, detailed information about the broad range of laws and regulations affecting the PEO industry in all 50 states and at the federal level.

The Federal Regulatory Database is the starting point for research into federal laws and regulations affecting PEOs.

For each state, the State Regulatory Database includes:

- Qualifying to do business
- PEO registration/licensing

- Unemployment insurance
- Workers' comp
- Health and other benefits
- Sales and other corporate taxes
- Starting/terminating the PEO-client relationship
- Records/record retention requirements



[www.napeo.org/regulatory-database](http://www.napeo.org/regulatory-database)

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## EQUIP YOUR TEAM WITH CUTTING-EDGE SOFTWARE

Evaluate your current ERP, payroll, or benefit software for built-in efficiencies – and decide if a new investment may be necessary. Does your current software equip your team and automate tasks associated with your payroll process and benefits administration that double, triple, or quadruple the number of WSEs a single representative can handle? Does your current software have cutting-edge features like 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? Automating employee onboarding will not only help your team and clients save time, but also provide a great first impression to new clients.

Additionally, are there areas of opportunity within your current software to increase efficiencies that you may not be taking advantage of? For example, are there opportunities to “turn the screen around” and allow your customers to complete tasks they’re better suited to perform (such as electronic onboarding and benefits enrollment)? Doing so will increase your customers’ satisfaction and allow your team to use their newfound time to provide greater customer care.

## SAVE TIME - AND THEN REINVEST IT - WITH AI

Did somebody say AI (Artificial Intelligence)? Not yet, but what article in 2024 would be complete without mentioning AI – the elephant in the room and a topic that you may be sick of hearing

about. Because of the continued, ever-increasing relevance of AI, an article like this one wouldn’t be complete without bringing it up. If you’ve been hesitant to incorporate AI into your business, or if you’ve wondered if it is a passing fad, know that it is here to stay and is becoming more advanced by the day – meaning that the applications for AI and LLM (Large Language Models) are only becoming more numerous. Examples of ways to incorporate AI into your business operations include virtual assistants, writing emails and other mass communications, generating marketing content, and improving your team’s effectiveness with existing applications such as Excel, Salesforce, Hubspot, and other tools. AI, like automation, delivers the bottom-line impact that frees your team to be more customer-facing and to spend less time pushing the same button over and over on a keyboard.

With automated tasks, software that drives efficiencies, and AI-powered processes, your team will be free to reinvest the time regained back into your customers. You know your customers better than anyone. For your customers, delivering personal touch and reinvesting time saved because of efficiencies may look like addressing special requests or completing projects that were sidelined due to lack of time or bandwidth. It may look like calling each customer, just to check-in. Or, it may look like proactively alerting them of the latest government mandates. Remember the days of hand-delivering checks or visiting a customer’s office with lunch in tow?

Whatever going the extra mile for your customers looks like for you, a company equipped with tools to tackle the future is attractive to prospective clients as well, especially those who may feel uneasy about the way ahead in a rapidly changing landscape.

It’s time for you to create a virtuous circle. Drive efficiencies into your business; with those efficiencies, redeploy people to customer-facing activities. More customer attention will lead to more business, leading to more money to invest in increased efficiencies – and on and on. Implementing technology to drive efficiencies and benefit your bottom line is nothing new. The great news is that you can still do that while also increasing your top line and your customers’ satisfaction.

At the end of the day, we are all here to make a difference to our customers and to elevate their experience. Paying more attention to your customers at a time when people are becoming more disconnected from each other and less personal will also attract new clients and ultimately, help your business grow. Efficiencies are and always will be an investment, and updating your daily processes may take time; however, the payoff is guaranteed. By innovating with technology, you will achieve your goals of improving efficiencies and delighting your customers. ■



**RYAN R. MOSSMAN**  
President  
PRO Software  
Houston, TX

# ENGAGING NEW SALES TEAM MEMBERS

BY CLAY M. KELLEY, SHRM-SCP

**T**oday's conversation is going to cover three areas to increase engagement with your sales team:

1. Telling the truth in the recruitment and selection process
2. Onboarding and training - especially in the first 30 days of employment
3. Managing performance

As always, the goal is to be able to serve you, the reader, and provide value added resources and reinforce the current practices.

## RECRUITMENT AND SELECTION

Through the years, we have penned a number of articles on implementing a comprehensive selection process. With the new PEO Insider website, you can easily find those articles. We can implement a lot of best practices in the process, but to ensure engagement, it is important that we be honest and

transparent with candidates applying for a sales position. We should set realistic expectations about the PEO sale and we should communicate to every candidate:

- Selling PEO is very complex
- The learning curve is long
- Getting to real decision makers is incredibly difficult
- Achieving consistent sales results does not happen in the short term

Failure to communicate these truths will result in increased turnover, wasted time and money.

## ONBOARDING AND TRAINING - ESPECIALLY THE FIRST 30 DAYS

As with mastering anything; a golf swing, a musical instrument...any worthy endeavor...training should be continuous and repetitive. The following is an outline of a 30 - day training plan - the operative word here is



*As with mastering anything; a golf swing, a musical instrument... any worthy endeavor... training should be continuous and repetitive.*

outline. You will need to make it your own, in content and timeframe - the goal is to help you with the heavy lifting of designing your own plan to increase engagement.

- **Day 1:** Execute all employment documents and onboarding processes. Communicate training expectations (sales expectations should already have been discussed). Make introductions to as many people

in the organization as possible. Coordinate meetings with each department for training. Begin trainings on internal communications technology and communications.

- **Day 2:** Other technology training. History of the company. Overview of company service offering. The PEO value proposition. Understanding co-employment. Role play explaining the PEO value proposition and co-employment. Company target market. Understanding the sales process and decision makers.

- **Day 3:** HR services offering. Role play explaining the PEO value proposition and co-employment. Important Point: Focus on how the HR team wants the service offering communicated. Role play explaining the HR services offering.
- **Day 4:** Workers' compensation and risk management services offering. Workers' compensation rates, modifiers, pricing. Important Point: Focus on how the workers' compensation and risk management team wants the service offering

communicated. Role play explaining workers' compensation and risk management services offering.

- **Day 5:** Employee benefits offering and benefits administration service offering. Important Point: Focus on how the employee benefits team wants the service offering communicated. Joint appointment with another sales team member. Prepare/review a list of business contacts
- **Day 6:** Payroll and technology service offering. Important Point:



# Solicitation Form

## Looking to get more involved in NAPEO's PAC? You need to sign the PAC solicitation form, first.

NAPEO PAC is part of a comprehensive government affairs program that includes lobbying, grassroots education programs, relationship building, communications, and financial support for those federal candidates who are strong supporters of the PEO industry.

All the funds donated to NAPEO PAC come from NAPEO members and associate members. If you want to get involved with NAPEO PAC, federal law requires that your company sign a PAC solicitation approval form. Signing this form gives NAPEO PAC permission to solicit the top executives in your

company for PAC contributions and to communicate with these individuals about the PAC. It is important to know that signing the solicitation approval form does not commit you or your employees to contribute to NAPEO PAC. View and sign the form at [napeo.org/pac](http://napeo.org/pac).



[www.napeo.org/pac](http://www.napeo.org/pac). Contact Thom Stohler, [tstohler@napeo.org](mailto:tstohler@napeo.org), for more information.

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Focus on how the technology team wants the service offering communicated. Debrief with sales leadership.

- **Day 7:** Sales process. prospecting and overcoming objections. Role Play: prospecting and overcoming objections. Joint appointment with another sales team member
- **Day 8:** Sales process. Proposal review. Prospecting and overcoming objections. Role Play: prospecting and overcoming objections. Joint appointment with another sales team member
- **Day 9:** Sales Process. Proposal review. Role Play: prospecting and overcoming objections. Make 20 prospecting calls. Joint appointment with another sales team member.
- **Day 10:** Underwriting and pricing procedures. Role Play: sales process. Joint appointment with another sales team member. Weekly review.
- **Day 11:** Role Play: sales process. Joint appointment with another sales team member. Proposal review.
- **Day 12:** Role Play: sales process. Review the client service agreement. Joint appointment with another sales team member
- **Day 13:** Role Play: sales process. Joint appointment with another sales team member. Review the client service agreement.
- **Day 14:** Role Play: sales process. Joint appointments with another sales team member. Debrief with sales leadership.
- **Day 15:** Role Play: prospecting and overcoming objections. Make 30 prospecting calls. Weekly review.
- **Day 16:** Shadow HR team. Shadow implementation team. Review a safety plan created for a client. New client onboarding.
- **Day 17:** Proposal review. Role play presenting an appointment. Make 30 prospecting calls.
- **Day 18:** Shadow payroll team. Focus payroll reporting. Make 30 prospecting calls.
- **Day 19:** Technology demo. Make 30 prospecting calls.
- **Day 20:** Joint appointment with sales team member. Technology demo. Weekly review.
- **Day 21:** Sales Process. Joint appointment with sales team member. Role Play: technology demo.
- **Day 22:** Role Play: Prospecting and overcoming objections. Make 30 prospecting calls. Joint appointment with another sales team member.
- **Day 23:** Role Play: sales appointment. Joint appointments with sales team members.
- **Day 24:** Joint appointments with sales team member.
- **Day 25:** Role Play: prospecting and overcoming objections. Make 30 prospecting calls. Joint appointment with another sales team member.
- **Day 26:** Role Play: prospecting and overcoming objections. Make 30 prospecting calls. Joint appointment with another sales team member.
- **Day 27:** Joint appointments with sales team members.
- **Day 28:** Proposal review. Role play presenting an appointment. Make 20 prospecting calls
- **Day 29:** Role Play: sales appointment. Make prospecting 20 prospecting calls. Joint appointments with sales team member.
- **Day 30:** Q & A sessions with HR,



*Performance measurements should be communicated during the recruitment and selection process. Training reviews should be conducted each week to ensure sales team members stay on track with their development.*

risk, benefits, and payroll teams.  
30 day Review.

## MANAGING PERFORMANCE

Performance measurements should be communicated during the recruitment and selection process. Training reviews should be conducted each week to ensure sales team members stay on track with their development. Set dates for performance reviews each month in the first six months and then quarterly from there. When performance reviews dates are set well in advance, everyone understands the expectations, and in the event there needs to be “tough” conversations, there are no surprises.

Wishing you the very best of engagement! ■



**CLAY KELLEY, SHRM-SCP**

Claykelley.com  
Arlington, TX

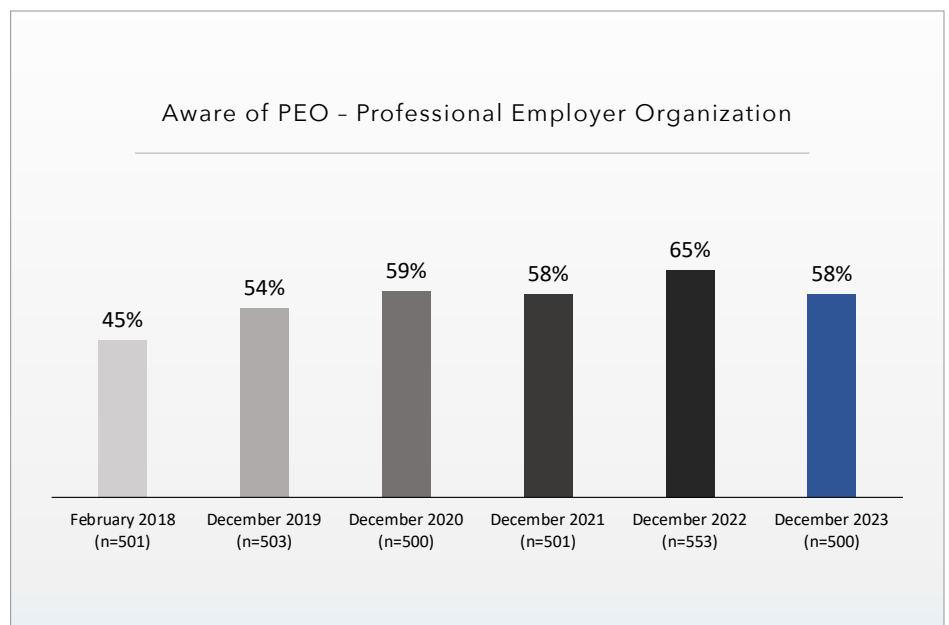
# NAPEO'S LATEST PEO AWARENESS TRACKING SURVEY

**S**ince 2018, we have partnered with Povaddo, a leading market research firm, to measure PEO awareness among business owners and key decision makers. The most recent survey was conducted between mid-November 2023 and early December 2023.

The survey found that measures of awareness, familiarity, and PEO use have generally remained consistent with the 2022 survey. This suggests a true, sustained increase in PEO awareness since we began the survey series in 2018.

**KEY FINDINGS:**

- Unaided awareness of PEOs is reported at 58% among decision



makers. This is a 13-point increase since 2018.

- Aided familiarity of PEOs increased in 2023 with about 80% of decision makers saying they are somewhat or very familiar with PEOs.
- 30% of decision makers report using a PEO.
- Of those who do not use a PEO, 80% indicated interest in doing so.
- Decision makers are mostly likely to learn about PEOs from friends and colleagues.

### APPROACH

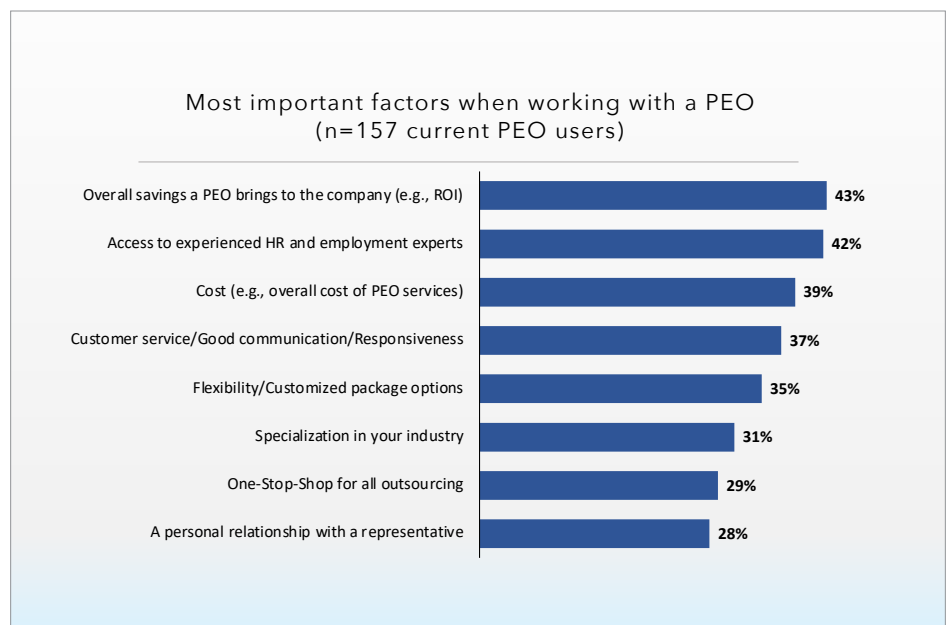
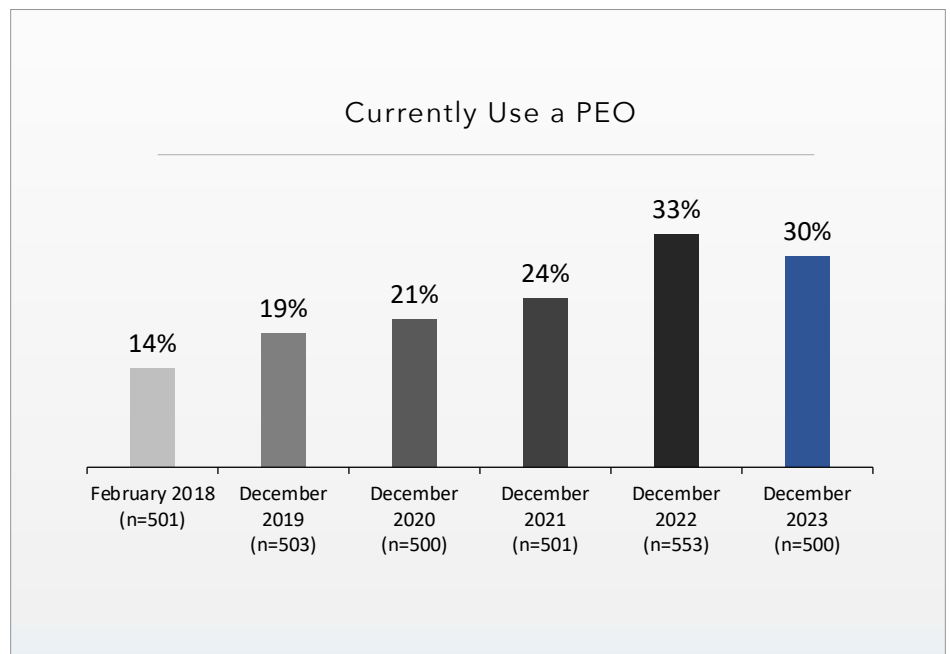
- Method: online
- Sampling: n=500 business decision makers. 65% business owners, 35% key decision makers
- Field dates: November 14, 2023, to December 6, 2023
- Margin of error: +4.4%

### SCREENING CRITERIA

In order to qualify to participate in the survey, respondent must have met these criteria:

- At least 25 years old
- Business decision maker for hiring professional services firm to help handle internal business functions
- At least 10 full-time employees
- Annual business revenue of at least \$500,000

To read the full report and other related resources, visit [napeo.org/marketing](https://napeo.org/marketing). The report is exclusively available to current NAPEO members. ■



# DESPITE UNDERLYING NEGATIVITY, OUTLOOK IS POSITIVE

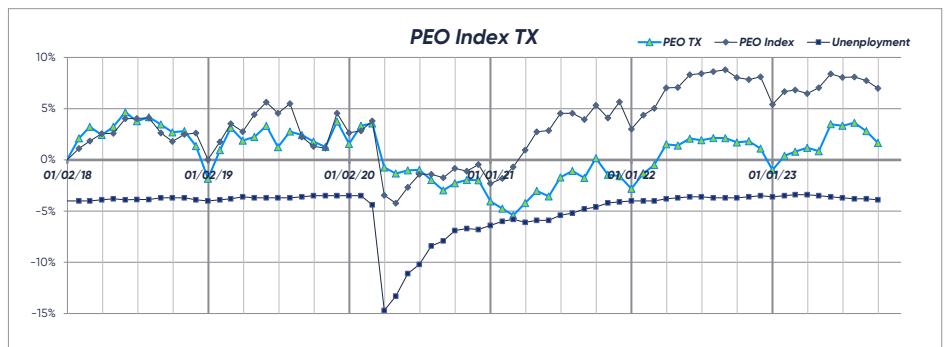
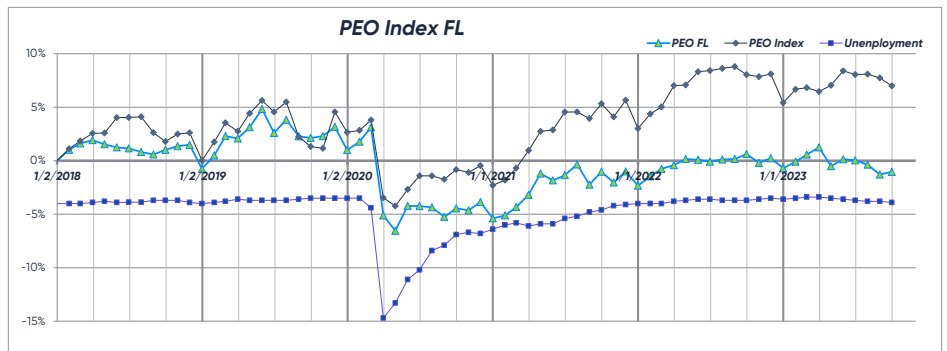
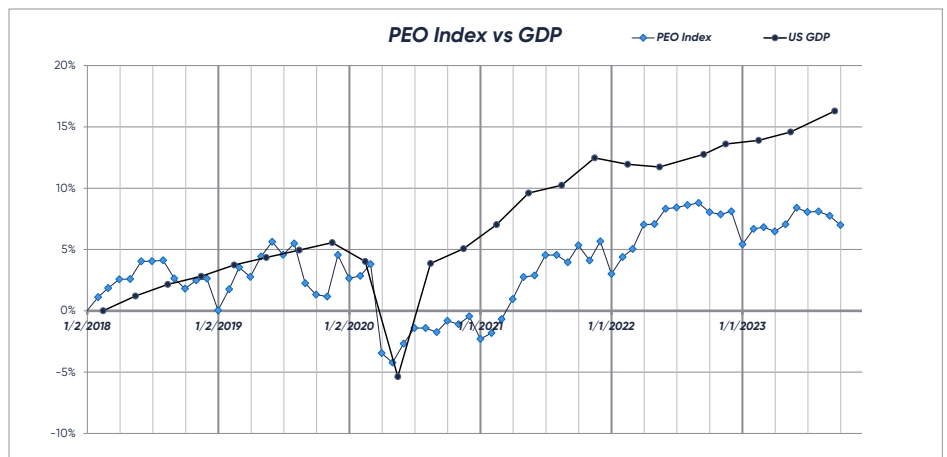
BY JOHN J. SLAVIC

**A** strong case can be made that the U.S. has already been through a “pseudo” recession in Q3 and Q4 of 2023. I say “pseudo” because the classic definition of a recession is two consecutive quarters with negative GDP. This obviously didn’t happen as the charts indicate. But what did happen is an inverted yield curve, rising unemployment, a very negative business and consumer sentiment, high interest rates and inflationary pressures. These factors are reflected in all three charts from a small and medium-sized business perspective. The side-ways movement of the PEO index likely reflects, not the veracity of the PEO model, but the underlying negativity of business.

As of the writing of this commentary, the stock market is at or near record highs. The stock market is arguably the best future economic predictor we have. Typically, it looks about nine months to a year in advance. This would indicate that the outlook for both GDP and the business economy is positive. Florida and Texas are also good bellwether states for the country. ■



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



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## Time to Renew Your NAPEO Membership

We look forward to continuing to serve you and your staff through NAPEO membership in 2024. To avoid disruption in your member services, please complete your membership renewal and submit your membership dues to NAPEO before December 21.

### Why should you renew?

As NAPEO is the voice of the PEO industry, it's crucial for you and your organization to be a member. Many of our members find the below invaluable to their membership experience:

- Timely updates on regulatory and legislative developments
- Access to the regulatory database at your fingertips
- Industry financial ratios and PEO operating statistics
- Invaluable networking opportunities with fellow PEO members

### Why members renew

"Being a NAPEO member is like tapping into a treasure trove of knowledge and opportunities every single day. From the invaluable insights and resources to the inspiring community of professionals, NAPEO has been a compass in navigating the ever-evolving landscape of the PEO industry. NAPEO isn't just an acronym; it's a badge of pride, a commitment to continuous growth, and a testament to my dedication to this incredible industry."

### Remind your organization's billing contact to renew today!

Only your organization's Main or Billing Contact is allowed to renew membership. Give them a gentle reminder to renew soon so you don't experience a lapse in membership!

If you require assistance or would prefer to complete an application and return via email or mail, please contact Andrea Desmond, [adesmond@napeo.org](mailto:adesmond@napeo.org), (703) 739-8169, or Cass Likouris, [clikouris@napeo.org](mailto:clikouris@napeo.org), (703) 519-3897.



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# BE HAPPY. LEARN SOMETHING. AND BE KIND.

BY CASEY M. CLARK

**M**y first day on the job at NAPEO was at our December Board meeting, where I was presented a blanket with a giant picture of my face on it. Apparently, this was NAPEO tradition and Pat offered, “Just wait until these are all over the country!”

“I don’t think so,” I said.

Less than two months later, here I am, penning an article about myself for a magazine with my face plastered across the cover. (There’s probably another picture of me somewhere near this column, too!) The irony isn’t lost on me.

With any luck, this will be the last time my face is on anything, but this is as good a time as any to share a little about me that doesn’t necessarily show up on my LinkedIn profile.

After graduating from my beloved University of Dayton, I left my hometown for Washington and never looked back. But my life in the association business started before that.

I earned my first paycheck as a summer intern at the American Trucking Associations in high school. I lived with my sister (now an association CEO) for four summers with the truckers, learning about membership organizations, the intersection of communication and

government relations, and building a network of lifelong friends and mentors.

Because of that experience, Washington was the only destination for me after school. I’ve loved raising a family in the Virginia suburbs and patching together interesting jobs into a meaningful career that I never would have imagined and wouldn’t trade for anything.

I’ve found throughout my career that I’m always energized by a challenge. I love team ball and finding ways to leverage the unique strengths of everyone involved to deliver meaningful results.

I feel very lucky to get to spend my time away from the office with my wife, Liz (herself an association CEO!), and the two of our three kids that are still at home, Finnegan and Penelope. (Connor graduated last year and is making his way on the mean streets of Columbus, Ohio.) We all share a love for live music and time on the water, and eek out as much of both as we can muster.

Future column inches will be dedicated to things that matter more to your bottom line, but I’ll share one more personal anecdote before you turn the page to more pressing content.

Every morning, I remind my daughter to do three things: Be happy. Learn something. And be kind.

It turns out to be apt counsel for a new CEO at NAPEO, too. I’m ecstatic to be a part of this great industry. I’m learning a ton



*I’m ecstatic to be a part of this great industry. I’m learning a ton every day about all you’re doing to enable the success of small and medium sized businesses all across the country.*

every day about all you’re doing to enable the success of small and medium sized businesses all across the country. And I’m overwhelmed with the kindness you’ve shown me as I get settled and look forward to being able to share that back with you when our paths cross this year. That’s a NAPEO tradition I’ll gladly carry on. ■



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