# PEO INSIDER

PUBLISHED BY THE NATIONAL ASSOCIATION OF PROFESSIONAL EMPLOYER ORGANIZATIONS®

THIS MONTH'S FOCUS

## TECH, DATA AND INNOVATION

SCALE SMARTER

AI GUARDRAILS

THE PEO OF TOMORROW



COVER STORY

# OPTIMUM HR:

## THE POWER OF STAYING PERSONAL

Kevin Gramian, CEO & Founder, Optimum HR

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VOL. 30 ISSUE 9

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Kevin Gramian, CEO & Founder, Optimum HR


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The Power of Staying Personal


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**STAFF**
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NAPEO
**CEO/PRESIDENT**
Casey M. Clark
**EDITOR**
Chris Chaney
**MANAGING EDITOR**
Kerry Marshall
**VICE PRESIDENT OF MEMBERSHIP DEVELOPMENT**
Nancy Benoudiz
703/739-8169
*nbenoudiz@napeo.org*
**DESIGN**
Holland-Mark

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# WHY MEMBERSHIP MATTERS

## BY BILL MANESS

As NAPEO's 2027 membership renewal season begins, I encourage you to think about what membership *really* means.

Sure, we all know there are tangible benefits that come with belonging to NAPEO: access to the regulatory database and timely legislative updates, industry research, PEO-specific educational programs, networking opportunities, *PEO Insider* and much more.

Those things matter, but the real value of membership is bigger than any one benefit.

Our industry faces issues that no individual company can tackle on its own. That is where NAPEO membership makes a difference.

One of the things I have always appreciated about this industry is how willing people are to help one another. We may compete for business, but when it comes to navigating a difficult regulatory issue, comparing notes on an operational challenge or thinking through what is coming next, there is tremendous value in being able to pick up the phone and talk to someone who has been there before.

> *Most importantly, NAPEO membership creates a unified industry voice that helps make all our businesses stronger.*

NAPEO helps create those connections. It also gives us access to the information and expertise we need to make better decisions and stay ahead of changes affecting our companies and our clients.

Most importantly, NAPEO membership creates a unified industry voice that helps make all our businesses stronger. When NAPEO advocates in Washington or in state capitals, educating policymakers about our industry, advancing pro-PEO policies or pushing back on proposals that could negatively affect PEOs, that work is possible because we speak with a united voice about how our industry helps 233,000 business and 5.4 million workers thrive.

As board chair, I get a close-up view of just how much happens behind the scenes on behalf of our industry. I also know none of it happens automatically. It happens because you have chosen to invest your resources and time in NAPEO. I hope you will continue to do so in 2027 so we may build upon the progress we have made this year.

Renewing your NAPEO membership is an investment in the strength and future of the PEO industry. It will take all of us working together to move this industry forward. I look forward to working alongside you once again. ■



**BILL MANESS**
*2026-2027*
*NAPEO Chair*
*CEO*
*Syndeo*

LEADERSHIP

## DAYBRIGHT FINANCIAL NAMES BEAU ADAMS AS NEW PRESIDENT

Daybright Financial has appointed Beau Adams as president. He brings nearly three decades of experience across retirement plan services, wealth management, recordkeeping, third-party administration and financial services. "Daybright continues to grow, and Beau's appointment strengthens our ability to scale thoughtfully, bring our businesses together around shared priorities, and deliver greater value to our clients," said Megan Schneider, chief executive officer of Daybright Financial. "Beau combines deep industry experience and proven business leadership with a collaborative approach. Most importantly, he shares our commitment to simplify health and financial wellness so people can make better choices today and tomorrow."

CONGRATULATIONS

## FISHER PHILLIPS LAUNCHES IN MIAMI WITH TEAM FROM ZUMPANO CASTRO

Fisher Phillips has launched its Miami office with a team from Miami-based law firm Zumpano Castro. Carlos A. Zumpano will serve as regional managing partner of the new office, which for the first two years will use the name Fisher Phillips Zumpano–The Miami Office of Fisher & Phillips LLP, reflecting the Zumpano name's established presence in the Miami market. The Zumpano team will continue to serve PEOs through the Fisher Phillips platform, which now has nearly 900 lawyers in 52 offices, including six offices in Florida with the addition of Miami.

RENEWALS

# NAPEO MEMBERSHIP RENEWAL SEASON IS HERE!



This year, renewals will take place through our new member portal, designed to make managing your membership and accessing NAPEO resources easier.

Before it's time to renew, take a few minutes to log in to the new portal, confirm your contact and company information is up to date and familiarize yourself with your account. When you're ready, renew your membership by **December 31** to continue enjoying uninterrupted access to the advocacy, education, resources and connections that come with being part of NAPEO.

**Log in to the member portal and get ready to renew: memberportal.napeo.org**

KUDOS

## COGNET NAMES LEAH COWPERTHWAITE CHIEF REVENUE OFFICER



NAPEO member CogNet has named Leah Cowperthwaite as Chief Revenue Officer. A PEO industry veteran, Cowperthwaite will lead the company's partnership strategy and channel growth. "Joining the CogNet team has been a dream come true. I am thrilled to work alongside industry veterans who are passionate about driving efficiencies and enabling growth. While the CogNet team has been in the trenches with PEO clients for nearly two decades, the complexity and evolution of the industry continue to highlight the benefit of having a strategic back-office partner with PEO process expertise and purpose-built technology. It is an honor to listen, learn and grow with clients and partners as CogNet introduces a new set of AI-powered tools (purpose built for PEO, of course) that expand the value of service delivery in our industry," said Cowperthwaite.

PARTNERSHIP

# JUSTWORKS PARTNERS WITH U.S. CHAMBER OF COMMERCE ON QUARTERLY SMALL BUSINESS INDEX



Justworks has partnered with the U.S. Chamber of Commerce to co-produce and release the quarterly Small Business Index. The partnership will bring together Justworks' expertise helping small businesses thrive and the U.S. Chamber's leadership in small business research and advocacy. "The Small Business Index gives small businesses a clear view into how their peers are approaching major business challenges like hiring, benefits, and growth," said Mike Seckler, chief executive officer of Justworks. "Justworks helps small businesses grow with confidence, and partnering with the U.S. Chamber of Commerce to bring actionable insights from the Index to more small businesses is extremely valuable to our current and future customers. We're proud to partner with the Chamber on this work, and we can't wait to see the impact on small businesses."

LEADERSHIP

# ALCOTT HR CEO STEVE POLITIS APPOINTED ESAC BOARD CHAIR



Alcott HR CEO Steve Politis has been appointed board chair of the Employer Services Assurance Corporation (ESAC), the accreditation and financial assurance organization for the PEO industry. Politis has been with Alcott HR since 2015 and has held executive leadership and legal roles throughout his career in the PEO industry. He also previously served as chair of the NAPEO Board of Directors.





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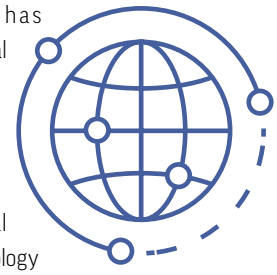
LEADERSHIP

## ENGAGE PEO APPOINTS ANDREW REIBEN AS CHIEF FINANCIAL OFFICER

Engage PEO has appointed Andrew Reiben as chief financial officer. He will oversee the company's accounting, financial reporting, planning, tax, lender relations and financial strategy. "Few companies within or outside the PEO industry have grown at the pace Engage has maintained year after year," said Jay Starkman, chief executive officer of Engage PEO. "Andrew brings financial and operational experience to help us manage that momentum and prepare for what comes next."

INNOVATION

## VENSUREHR EXPANDS GLOBAL OFFERING

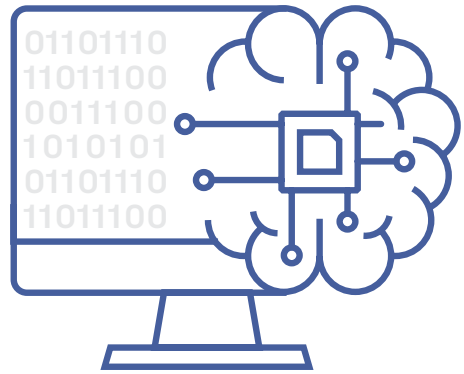


VensureHR has expanded its global offering with the introduction of international HR consulting services and global workforce technology solutions. The new services provide organizations with access to global HR professionals who offer guidance on workforce planning, worker classification, employment laws, policy development and more. "Organizations expanding internationally face challenges that go well beyond hiring and payroll," said Alex Campos, chief executive officer of Vensure Employer Solutions. "They need trusted guidance on workforce strategy, compliance, and operational planning, while also ensuring employees have the tools and technology required to succeed. These new capabilities strengthen our ability to support clients through every stage of building and managing a global workforce."

INNOVATION

# GRADIENT AI DELIVERS MAJOR RENEWAL ANALYTICS UPGRADE

Gradient AI has launched a significant expansion of Renewal Analytics, its group health platform that translates claims experience into forward-looking risk assessments. The latest release introduces new capabilities—including incurred but not reported adjustments, peer benchmarking, a group termination model, integrated risk scoring and client-ready PDF reporting—alongside continued enhancements to the platform's analytics, drilldown and filtering functionality.




LEADERSHIP

# BESTFIT PEO SOLUTIONS APPOINTS MARCUS MALONE AS CHIEF REVENUE OFFICER

BestFit PEO Solutions has appointed Marcus Malone as chief revenue officer. He will lead the company's revenue strategy, including expanding its national partner network, strengthening relationships with PEO providers, accelerating new business production and developing scalable distribution channels for independent brokers and business advisors. "Marcus understands growth because he has built it from nearly every seat at the table," said Nate Olsen, president of BestFit PEO Solutions. "He knows how to develop sales teams, strengthen partner relationships, navigate complex PEO opportunities, and turn strategy into production. Just as importantly, he shares our belief that sustainable growth begins with helping brokers and their clients make better decisions."

CONGRATS

# NEXTEP NAMED TO 2026 BEST WORKPLACES LIST

Nextep has been named to the 2026 *Fortune* Best Workplaces in Consulting & Professional Services list by Great Place to Work and *Fortune* magazine. This marks Nextep's seventh consecutive year on the list. "At Nextep, our people are, and always will be, the foundation of everything we do," said Brian Fayak, president and chief executive officer of Nextep. "Being named one of *Fortune*'s top workplaces in the country for another year proves that as our organization grows, we've stayed true to creating an environment where team members feel valued and encouraged. That internal culture is exactly what drives our award-winning customer service."



LEADERSHIP

# COAD APPOINTS DON WEINSTEIN TO BOARD

CoAd has appointed Don Weinstein to its board of directors. Weinstein served as chief product and technology officer at ADP, where he spent 17 years leading enterprise product strategy, technology innovation and digital transformation initiatives for billions in revenue-generating platforms. "Don's tenure as CPTO at ADP gives him firsthand experience architecting and scaling the technology and product strategies that define the modern HCM industry," said Jim Neve, chief executive officer of CoAd. "He understands both what customers expect from workforce technology and how leading companies build and deliver at scale. That perspective is invaluable as we position CoAd's product roadmap and capabilities for the next phase of growth." ■