



MUST YOU SAY GOODBYE WHEN STAFF MOVE AWAY?

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Sometimes good working relationships are disrupted by relocations. People move for various reasons, but the most common occurrences are related to employment changes of a spouse, or a need to be in closer physical proximity to other family members. Unless one happens to have a branch office in the location to which the current staff member will relocate, we expect to say goodbye. But must we?

In the early 2000's I was contacted by a well-seasoned attorney with a dilemma. His secretary has been with him since he was a newly minted lawyer. He depended on her for everything. Her husband has just gotten a job promotion which required the family relocate to "the other side of the mountain." The attorney's angst stemmed from a true feeling that he could not practice law without his secretary. He wanted to know how he could continue her employment relationship.

Before I could offer advice, I had to determine what her role truly was. We identified all the tasks she performed. We then discussed what roles were absolutely essential for her to continue to fill, from his perspective. When we were done, we had two distinct job descriptions. One required an on-site clerk, part-time, who would require little training and be at a much lower pay grade, to perform the non-essential tasks. The other job description contained the mission critical tasks which his current secretary needed to continue to perform.

Three aspects of change needed to be planned out. First, what changes to technology would be required for her to perform the essential tasks remotely? Who was going to support it? Who was going to install it?

Second, what changes in procedure would be required to effectively communicate and coordinate workflow between her and the attorney, and the part-time assistant? The most careful thought went into this aspect. For her to continue to fill her role, it required that the attorney commit to digitizing files going forward. The attorney had to actually use his computer. Document management became necessary to ensure things were consistently labeled and stored electronically; and ensure everyone could find what someone else had scanned and saved.

Third, how was the attorney going to effectively supervise to ensure that issues like maintaining client confidentiality, ensuring workplace safety, and getting the work he would pay for, be accomplished? We needed to establish guidelines – do's and don'ts – for the work environment of the remote secretary, timekeeping procedures for wage and hour purposes, and so forth.

In the decade+ which has elapsed since that challenge, we have seen so many tremendous improvements in technology, it makes so much of this challenge a veritable walk in the park. We not only have virtual workers as a commonplace occurrence, but we have entirely virtual law firms as well. All the puzzle pieces have long been clearly identified and assembled for us.

I was recently contacted on the hot line by an office assistant who called on behalf of her attorney. She was being forced to relocate, and sought guidance on how to find a replacement to fill her shoes. From what she described as we reviewed the elements of the job description, she was going to leave big shoes to fill.

We discussed the interviewing protocol, the content and placement of the advertisement, and how she needed to codify most of what she was doing, for her replacement to use as a guide. I could tell that she was not only overwhelmed by the process, but also deeply saddened about leaving her position. I asked her about it, and she confirmed that she had hoped to finish out her career in the position.

I asked her the obvious question from my perspective, "If you really like working for him so much, and love the job you're doing, why aren't you instead asking about how to do it from your new location?" She was stunned. It never occurred to her that she might be able to keep her job. So I explained that with the help of technology, implementation of some sound work procedures, and delegation of some lower level duties to someone part-time onsite, it was entirely doable.

She discussed it immediately with her attorney. The next day she was back on the phone with me to say they were both so relieved and excited to continue the working relationship. I immediately started detailing with her how to put the pieces of the puzzle together.

Without going into too much detail, let me briefly outline the basic necessary technology and procedures to make this happen. Puzzle pieces include digital dictation, hosted Exchange so that both attorney and staff access the same calendar and contacts, document management, and a good multi-function at each location. Scanning and digitizing is essential, so that everyone works with the same



electronic file documents. Electronic fax receipt as PDF attached to an email is a no-brainer. And a VoIP telephone connection. Any existing phone number can be ported to a VoIP provider, so that a remote worker can answer and route calls just like he or she is in the same office. And in all likelihood it will provide a greater depth of features than a solo office would normally have. For example, unified messaging whereby vmails are automatically routed to ones inbox as a sound file attachment.

Procedurally, there are login / logout time clock apps for wage and hour compliance. The remote computer must be kept secure from others in the household using it. Especially teenagers who typically visit internet sites loaded with scumware. The remote office must have a shredder for all trash. Workplace safety issues must be addressed, including things like trip hazards, electrical overloading, and supportive ergonomics.

This is a fairly good sampling of the puzzle pieces which need to be assembled. And remember I'm here to help you with it if the need arises.

Experience dictates that a good deal of the time you accept one's resignation with a private sigh of relief. You wonder what took the employee so long to get the hint. Or you appreciate that you will avoid an inevitable confrontation. In those cases you fake a sad face, extend your hand and express your best wishes, while secretly thinking "Don't let the door hit you in the a\$\$ on your way out." However, your takeaway is in understanding that when someone you depend on is moving away, you don't necessarily have to say goodbye. If you both want to continue working together, ending the employment relationship isn't the only option available.

*A version of this article originally appeared in the
September 7 issue of PA Bar News*

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