



'No place to hide': Carson using metrics, daily huddles to keep remote workers productive

Chief executive Ron Carson says he's more in touch with his leadership group than ever, but adds that people are getting 'a little worn out' seven weeks into remote working.

by Jake Martin for Citywire

The Covid-19 pandemic prompted advisory firms to shift operations to home offices, ready or not, and has led many firms to rethink how they work.

Carson Group chief executive Ron Carson (pictured) said that even with the existing resources and infrastructure to support hundreds of employees across the country, his \$12bn firm hasn't been immune to challenges and change and [cancelled plans](#).

While the implementation of a companywide work-from-home policy went smoothly, the reality is that people are getting 'a little worn out' seven weeks into remote working, he said during RIA consultancy Advisor Growth Strategies' 'Evolve Your Organizational Structure' webinar on Thursday.

Carson conceded that operating the business from home can be 'spotty' but that overall he'd give his firm an 'A-minus.'

He said there's 'no place to hide' for underperformers, however.

'I'm more in touch with my leadership group than ever,' he said, adding that the group has a huddle every morning at 8:30 a.m. that runs about a half hour. He also said the group is pulling in 'really tight metrics' to determine who's productive and who's not.

'We have 240 — we call them internal stakeholders — working from home and some are over-the-top busy and others are just not,' Carson said. 'It's a hard environment.'

John Furey, managing partner of Advisor Growth Strategies, noting that everyone performs differently in a crisis, asked Carson what the firm is doing to help team members cope and maintain the company culture.

Carson said he's started a weekly 'stakeholder happy hour,' and that the firm has also done trivia nights, a costume contest and even has a karaoke competition coming up. Aside from organizing some morale boosters, the firm is also fielding some mental health and daycare issues.

'Our talent group has had more counseling sessions with people who are down or depressed, or they have kids and they're not at daycare and they don't have any help,' Carson said.

He said the firm also uses an app it implemented about a year ago called Officevibe, through which Carson gets feedback from people.

'You can get real-time input on how each department is doing and how individuals are doing,' Carson said of Officevibe. 'They can answer anonymously or not, it's dirt cheap, but the incremental value I feel like we've gotten as an organization is just tremendous.'

Another tool the firm uses, Traction EOS, essentially helps firms build out their organizational chart and accountability structure as well as build, maintain and track projects. It has also come in handy with the shift to remote working, as the firm can track progress on different projects.

'Sometimes it's hard to know whether you have people really functioning or if they're hiding, and Traction really exposes that, very quickly,' Carson said. 'We've made a lot of changes because we thought they were functioning at a higher level when, truly, they were not.'

Carson, 55, noted that his firm is 'fairly young,' with the average age of an employee in their mid to upper 30s.

'The young professionals got a bad rap,' he said. 'They are one of the best treasure troves in the world. However, they're so different from the way I came up. If I tried to manage them and run them the way I did myself and, early on, my group, I wouldn't have anybody working for me.'

Most of all, Carson said, the younger professionals want ownership.

'This is where Traction is really good,' he said. 'The owner of a particular project can run with it and do what they need to do.'

During the pandemic, Carson Group has still been able to bring offices on board and do orientation via webinars, rather than necessitating in-person visits to the Omaha, Nebraska headquarters and sending in-person help to help open the office.

'We used to send a SWAT team out, but obviously, we're not doing that now,' Carson said, adding that the firm onboarded a \$140m Vermont-based firm the first week of April and moved over 100% of clients in 15 days.