



Financial Services  
67,000+ Employees  
50+ Countries  
Insurance  
Founded 1868

### BACKGROUND

*Headquartered in New York City, this publically traded Fortune 500 Company is the largest provider of life insurance in the US and serves 90 million customers globally.*

### WORKFORCE CHALLENGES

In order to meet seasonal peaks in demand, the company engages up to 200 independent contractors each year to serve as benefit counselors to their customers. Many of these independent contractors have long-standing relationships with the company, some spanning more than 20 years. On average, 85 percent of these contracted benefit counselors return each year to support the program.

The company was faced with losing many of these loyal, high-performing workers when a new corporate policy was issued that prevented the use of any independent contractor acting as a sole proprietor. The company not only faced significant workforce attrition, but needed a solution that could accommodate the complexities of their internal pay codes and how these contracted benefit counselors were paid.

The company could no longer accept manual time card submissions and wanted to automate the entire time card entry and approval process. Their incumbent vendor management system (VMS) could not support all of the required line items within their time card and expense module; nor could it provide the level of reporting the company needed for enterprise-wide visibility.

## CASE STUDY

### About AgileOne

AgileOne's consultative approach solves workforce challenges by combining innovative talent procurement technologies and programs, with experienced industry professionals to deliver a suite of total workforce solutions. We maximize the value of our customers' workforce, decreasing liability and overhead associated with human capital management.

### SOLUTION

The company implemented AgileOne's professional payrolling solution, AllSourcePPS, to get the capabilities and customized approach they needed. Through AllSourcePPS, AgileOne became the employer of record for all the independent contractors who were previously acting as sole proprietors, converting them to W-2 workers and managing all of the time and expense processes on behalf of the company. This allowed the company to be compliant with the new corporate policy regarding contracting sole proprietors.

At first, many of the workers were reluctant to change their employment status and resistant to the new, automated process. AgileOne's dedicated team worked closely to manage the changes, providing thorough, web-based trainings to ensure high worker retention. The team created check lists and a step-by-step Time and Expense Guide for Benefit Counselors to augment the online training.

By taking over the management of time and expense processes, AgileOne lifted an enormous administrative burden from the shoulders of the company's human resources (HR) department. To ensure proper compensation, there were a wide range of line items that workers needed to provide; for some, there were over 30 pay codes submitted for approval. With a growing pool of nearly 300 contractors under management, this represented over 9,000 lines of data managed each pay period.

In addition, as the employer of record for these contracted benefit counselors, AgileOne assumed many of the time-consuming management activities they required including:

- On-boarding and training management
- Employment verifications through E-Verfiy
- Collection, retention and audits of all employee paperwork
- Set-up of direct deposits
- Weekly audits of pay/expense fields in AccelerationVMS
- Processing of annual bonuses
- Mailing of year-end W-2 forms
- Monthly and annual payroll reports

### RESULTS

Retaining AgileOne has allowed the company to continue to utilize and expand the pool of high-performing workers that the business needs, while providing a layer of protection from the risks associated with engaging independent contractors. The company saves time and money by outsourcing new employee training and all other administrative, workforce-management tasks to AgileOne.

