

Should I Fire Someone Using Zoom?

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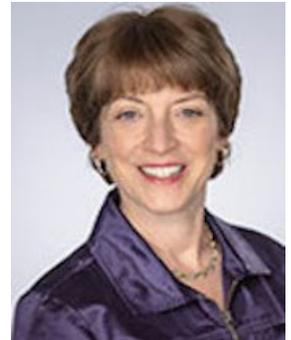
by Beverly Flaxington

Beverly Flaxington is a practice management consultant. She answers questions from advisors facing human resource issues. To submit yours, email us [here](#).

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Dear Bev,

A team member has been a support function working for our senior advisors for almost five years. She has a nasty streak and advisors are afraid of her – they will hesitate to ask her when a client needs something or to follow up when she has committed to get something for a client.



I've wanted to fire her for some time but she is an older woman and I have been afraid of legal ramifications. Our revenues, like many advisory firms, are off a bit. We're certainly not in any trouble, but I could justify a layoff if I wanted to.

Is this the best approach? Will I send a bad message and scare others in the firm if I were to eliminate her role? I don't want to create an opportunity out of a crisis. But in some ways the crisis presents an opportunity to rethink our business and get rid of a long-standing problem. Please do not use my real initials as I believe team members would know who we are by the elements I have included here.

A.A.

Dear A.A.,

Do you think if you fire this person now you will avoid any potential fallout that might arise? Is it easier for you to do this virtually rather than face-to-face when in the office with her? Is it easier because other employees are not in the office, so the pain won't be felt as acutely? Do you think this employee is less likely to engage in a lawsuit or make trouble for you under these circumstances? Is she the most junior person tenure-wise and/or can you justify why she would be singled out over others?

Consider those questions because you might be under-estimating the ease of doing this now versus when you return to the office and can have a conversation. I totally understand the desire to tie this (legitimately) to decreased revenue, but don't overlook the whys and wherefores about what you are doing.

Recently I talked to a client who had to downsize an internal team and did it virtually believing it would be easier than waiting until they all returned to the office (which is anyone's guess when that may be, of course). He was shocked at the vitriol he received not only from the two people who were eliminated but from others on the team about his lack of care and concern during these difficult times. He reported to me that he wished he had waited (it was not an urgent issue), because dealing with the aftermath has taken away his time and attention significantly and he gets so frustrated having a conversation, hanging up and then having the issue be raised again.

I reflect on his conversation not because this is what will happen to you, but to ask you to think about your culture, your other team members and this team member, and anticipate how it will unfold. If you have a confidant within the firm who knows everyone and could help you think this through, it might be a good idea.

If financially you can afford it, and her disruption is minimized in this virtual environment, I lean toward waiting until you can all be back in the office and can deal with this face-to-face. But again I don't know all of the dynamics. Explore "what if" scenarios with a trusted team member to figure out what's best for you and your situation. Good luck!

Dear Bev,

It's really a new world. If you ever told me I would hold a client meeting with my dog barking, my wife working across the

room while I am on the phone and walking back and forth to our scanner behind me and a three-day growth on my face, I would have called you crazy. But it is what it is.

My question is whether we are losing an important level of professionalism in our industry and whether we should continue to have some standards for our team members. We have always had rules in our office around appropriate dress and behavior. Shouldn't we be considering how we will engage virtually? One of my partners raised this in our conversation last evening, so it made me think about whether that's important.

Y.W.

Dear Y.W.,

Most firms are struggling just to do what's needed while in a work from home (WFH) environment. I've had firms tell me about technology issues, phone system problems, losing electricity at one or more of their associate's homes due to weather and related problems, clients breaking down and crying or yelling at them over Skype or Zoom and so on. Most people understand that in today's environment, everyone is doing the best they can do to keep focused on what's important and what's necessary.

As long as your team members are:

1. Responding to clients quickly and accurately as they would in the office;
2. Being honest and transparent with clients (where they can and should be);
3. Providing clients with accurate and timely information;
4. Making themselves available for clients;
5. Doing the other things required of them – i.e. attending investment committee meetings, doing business development;
6. Communicating effectively with team members; and
7. Showing up to internal meetings prepared and contributing ideas and feedback.

Then you are doing quite well. Most people can't get to the barber, hairdresser, manicurist, gym and so on and can't present the same "positive" image they might have in the past. Most families are forced to share a working environment (and schooling too) and they have to share space, computers, phones, and so on. There will be disruptions and interruptions. Most clients are quite aware of this. As long as your team is doing all of the above and putting a respectful focus on your clients, they are doing the right thing.

Don't add another layer of concern about appearance or working conditions. Once you are back in the office, reinforce whatever "rules" you have for showing up there.

*Beverly Flaxington co-founded **The Collaborative**, a consulting firm devoted to business building for the financial services industry in 1995. The firm also founded and manages the **Advisors Sales Academy**. She is currently an adjunct professor at **Suffolk University** teaching undergraduate and graduate students **Entrepreneurship** and **Leading Teams**. Beverly is a **Certified Professional Behavioral Analyst (CPBA)** and **Certified Professional Values Analyst (CPVA)**.*

*She has spent over 25 years in the investment industry and has been featured in **Selling Power Magazine** and quoted in hundreds of media outlets, including **The Wall Street Journal**, **MSNBC.com**, **Investment News** and **Solutions Magazine for the FPA**. She speaks frequently at investment industry conferences and is a speaker for the **CFA Institute**.*