

NORTH ORGANIZATIONS™ · SELECTED WORK

HR OPERATIONS · PEOPLE OPERATIONS



Remote HR & People Operations

ILLUSTRATIVE CASE STUDY

Building a clear, compliant, and repeatable employee experience for a distributed team.

ILLUSTRATIVE CASE STUDY · REMOTE MULTI-STATE AGENCY

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Confidence North™

HR OPERATIONS · PEOPLE OPERATIONS · COMPLIANCE · EMPLOYEE LIFECYCLE

Small teams still need strong HR systems.

TODAY

HR tasks handled across email and Slack
Onboarding varies by employee
Employee data lives in multiple places
Payroll changes handled manually
Policies may not reflect every work location
Contractor and employee processes overlap
Offboarding depends on someone remembering every step
Leadership becomes the default HR help desk



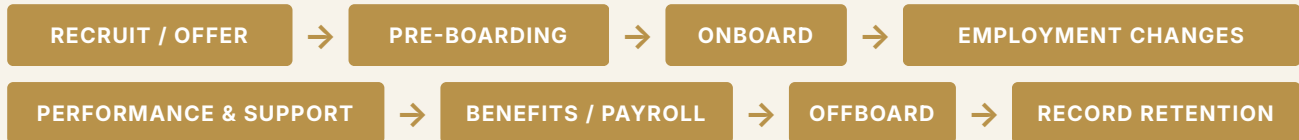
FUTURE STATE

Clear employee lifecycle process
Consistent onboarding experience
Accurate HR records in one place
Reliable payroll administration
Compliance tracking by jurisdiction
Defined contractor processes
Secure, complete offboarding
Clear policies and SOPs
Trusted HR support for leadership and employees

The goal is not to add bureaucracy. The goal is to make the important things consistent.

One simple system for the full employee lifecycle.

8-STAGE EMPLOYEE LIFECYCLE



SUPPORTING FOUNDATIONS



Every employee change should have a clear **trigger, owner, checklist, record, and completion point.**

A well-designed lifecycle makes every transition predictable.

Know where people work. Know what needs attention.

- 01

MAINTAIN CURRENT WORK LOCATION

Record and verify the current work location for every team member before any other compliance determination is made.
- 02

IDENTIFY APPLICABLE JURISDICTION

U.S. state · Local requirements where applicable · Canadian province
- 03

MAINTAIN COMPLIANCE TRACKER

Required notices · Leave requirements · Payroll considerations · Required policies · Final-pay requirements · Training requirements · Benefits considerations
- 04

REVIEW CHANGES ON A DEFINED CADENCE

Schedule quarterly reviews. Assign a clear owner for each jurisdiction category.
- 05

ESCALATE WHEN NEEDED

Jurisdiction-specific legal questions should be routed to qualified employment counsel. HR owns the process; counsel addresses interpretation.

ILLUSTRATIVE COMPLIANCE MATRIX

Member	Type	State / Province	Required Review	Last Checked	Next Action	Status
M.R.	Employee	California	New-hire notice review	Aug 2026	Q4 review	In Progress
T.L.	Employee	Texas	Required policy update	Jun 2026	Q3 complete	Pending
S.K.	Contractor	Ontario, Canada	Employment classification review	Jul 2026	Renewal Dec	Pending
A.B.	Employee	Washington	Paid leave requirement	Aug 2026	Q4 review	Active
R.M.	Employee	British Columbia	Provincial employment standards	Aug 2026	Q4 review	Active

HR owns the process. Qualified counsel should review legal questions when interpretation is required.

Compliance should be managed as an operating process, not a memory exercise.

A great first day starts before Day One.

OFFER ACCEPTED

- Offer documentation complete
- Employee information collected
- Payroll setup initiated
- Benefits information prepared

PRE-BOARDING

- Gusto setup · Account requests
- Equipment coordination
- Directory update · Welcome message
- First-week schedule · Manager checklist

DAY ONE

- Team introductions · Systems access
- Company orientation · Role expectations
- Policies · Payroll / benefits confirmation

WEEK ONE

- Training plan · Key stakeholder meetings
- Role priorities
- Manager check-in

DAY 30

- Onboarding check-in · Access review
- Training status
- Employee questions
- Manager feedback

A strong onboarding process coordinates HR, manager, payroll, systems, and employee experience.

Payroll data should match the real employee experience.

NEW HIRE

- Create employee profile
- Enter required information
- Confirm payroll setup
- Confirm tax / work location data
- Benefits enrollment where applicable

EMPLOYEE CHANGE

- Compensation change
- Address change · Work-location change
- Role change · Manager change
- Benefits change

LEAVE / STATUS CHANGE

- Document change
- Update records
- Coordinate payroll / benefits

TERMINATION

- Confirm effective date
- Update payroll
- Coordinate final-pay requirements
- Remove benefits where applicable
- Update records · Document completion

Every employee change should be reflected consistently across HR records, payroll, directories, and internal systems.

A payroll record that does not match the actual employment situation creates unnecessary risk and confusion.

Specific system actions should follow company permissions and applicable payroll requirements.

Illustrative workflow designed around the client-stated Gusto environment.

A clean exit protects the employee and the company.

HR

- Separation documentation
- Final payroll coordination
- Benefits information
- Required notices
- Record updates
- Exit communication

MANAGER

- Transition plan
- Work handoff
- Client / project transfer
- Team communication

IT / OPERATIONS

- Email access
- Slack · Shared drives
- Software access
- Passwords / credentials
- Equipment return

ADMIN

- Directory removal
- Org chart update
- Contact lists
- Vendor systems

POST-EXIT

- File documentation
- Confirm final actions
- Retain required records
- Capture lessons learned

Offboarding is complete only when **payroll**, **access**, **records**, and **communication** are all closed.

A well-run exit is a reflection of how a company treats the people who work there.

One source of truth. Clear ownership.

FIVE CORE RECORD CATEGORIES

EMPLOYEE PROFILE

Name · Role ·
Manager ·
Status · Location
· Start date

EMPLOYMENT RECORDS

Offer
documentation ·
Compensation
changes ·
Performance
documentation ·
Required forms

PAYROLL / BENEFITS

Payroll status ·
Benefit
enrollment ·
Leave
information

SYSTEM ACCESS

Email · Slack ·
Core business
systems

DIRECTORY INFORMATION

Role · Team ·
Contact
information ·
Reporting
relationship

CHANGE PROPAGATION PROCESS



A change should never be reflected in one system and forgotten everywhere else.

Data integrity is a discipline, not an outcome of good intentions.

Different worker types need different processes.

EMPLOYEES

- Employee offer / agreement
- Payroll
- Benefits eligibility
- Required policies
- Onboarding
- Performance management
- Employee records
- Offboarding

INDEPENDENT CONTRACTORS

- Contract / scope
- Payment process
- Project access
- Required documentation
- Contractor onboarding
- Deliverable expectations
- Contract renewal / end date
- Access removal

Worker classification should be reviewed based on applicable legal requirements. HR should maintain clear and separate administrative processes for employees and contractors.

Separate workflows reduce confusion and administrative risk.

Make it easy for employees and leaders to know where to go.

ROUTINE HR REQUEST

EXAMPLES

- Address update
- Payroll question
- Benefits question
- Directory change

Response: HR handles directly.

MANAGER SUPPORT

EXAMPLES

- Performance concern
- Role change
- Employee relations question
- Hiring need

Response: HR advises manager.

COMPLIANCE QUESTION

EXAMPLES

- Leave
- Termination requirements
- Worker classification
- Multi-state issue

Response: HR reviews and escalates when needed.

URGENT EMPLOYEE MATTER

EXAMPLES

- Serious employee relations issue
- Harassment concern
- Safety issue

Response: Immediate HR review and appropriate escalation.

COMMUNICATION EXPECTATIONS

Slack

Routine internal questions

Email / documented channel

Formal matters

Private meeting

Sensitive matters

Responsive HR does not mean every issue is handled the same way.

Build the system once. Use it consistently.

POLICIES

- Remote work
- Time off
- Leave
- Expense reimbursement
- Confidentiality
- Workplace conduct
- Communication expectations

SOPS

- New hire onboarding
- Employee change
- Payroll update
- Offboarding
- Benefits administration
- Record maintenance
- Contractor onboarding

TOOLS

- Onboarding checklist
- Offboarding checklist
- Employee change form
- HR request tracker
- Compliance calendar
- Policy review tracker
- Employee directory
- Manager guides

Policies explain the rules. **SOPs** explain how the work gets done.

The best HR system is one that people can actually use without calling HR to explain it.

Good HR runs on a calendar, not emergencies.

WEEKLY

- New hires / exits
- Payroll changes
- Employee questions
- Manager support
- Record updates
- Open HR actions

MONTHLY

- Employee records audit
- Contractor status review
- Benefits changes
- Directory review
- Compliance actions
- Policy / SOP updates

QUARTERLY

- Multi-state compliance review
- Policy review
- HR metrics
- Contractor renewals
- Manager check-ins
- Employee experience review

ANNUALLY

- Handbook review
- Benefits renewal support
- Required training
- Compliance calendar refresh
- Employee data audit

A clear rhythm turns HR from reactive administration into reliable operations.

Predictable HR creates predictable business outcomes.

Stabilize first. Then improve.

01

DAYS 1-10

ASSESS

- Employee roster · Contractor roster
- Work locations · Gusto setup
- Benefits · Current policies
- Employee files · Onboarding · Offboarding
- Current HR requests · Open compliance items

02

DAYS 11-20

STABILIZE

- Clean employee records
- Create HR tracker · Confirm ownership
- Standardize onboarding
- Standardize offboarding
- Build compliance calendar
- Document immediate priorities

03

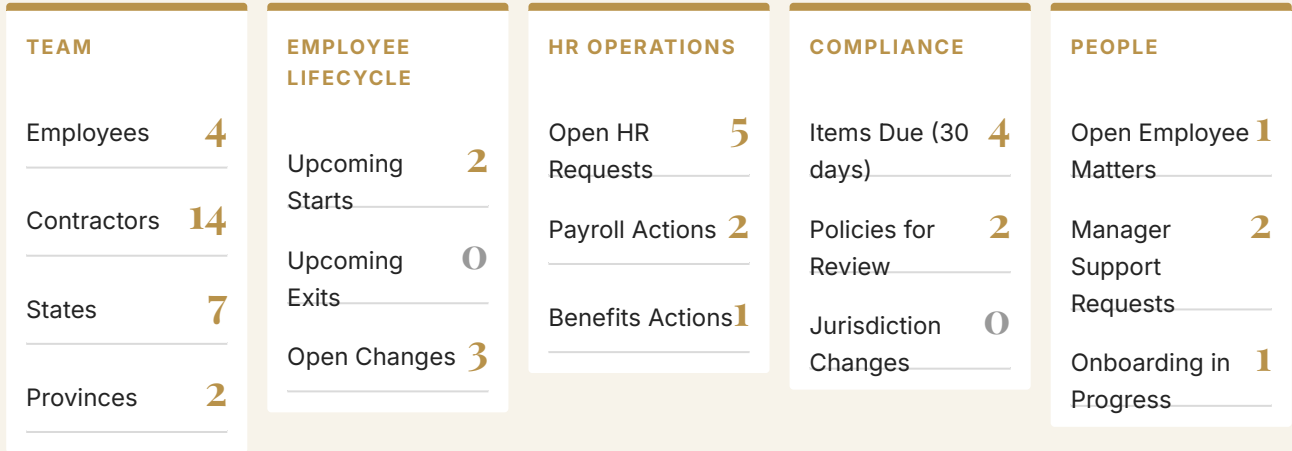
DAYS 21-30

IMPROVE

- Create SOPs
- Improve policy library
- Build HR operating rhythm
- Create manager tools
- Establish reporting
- Set priorities for next 90 days

The first 30 days begin with assessment, then move quickly into stabilization and practical improvement.

Give leadership visibility without creating more meetings.



Illustrative Dashboard Data.

Leadership should know what needs attention without having to manage HR themselves.

Visibility is not surveillance. It is accountability made visible.

Senior HR support without building a full HR department.

DAY-TO-DAY HR

- Employee support
- Manager support
- Payroll administration
- Benefits coordination
- Records

COMPLIANCE

- Multi-state tracker
- Policy maintenance
- Calendar
- Issue escalation

EMPLOYEE LIFECYCLE

- Onboarding
- Changes
- Offboarding

PROCESS IMPROVEMENT

- SOPs
- Templates
- Checklists
- Automation opportunities

LEADERSHIP SUPPORT

- HR guidance
- Employee matters
- Workforce questions
- Decision support

WHAT THIS WORK DEMONSTRATES

HR OPERATIONS

MULTI-STATE COMPLIANCE

EMPLOYEE LIFECYCLE

PROCESS DESIGN

PEOPLE OPERATIONS

LEADERSHIP SUPPORT

The goal is a small-company HR function that feels organized, responsive, and dependable.

Discuss a Fractional HR or People Operations Engagement →

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