Introduction to Best Practices
- Why best practices?
- Assessing where you are today
- Improving business processes – where best practices fit
- Best practices trends and issues
- Understanding best practices
- HR/payroll process components
- Best practices defined
- Typical attributes – payroll best practices

Best Practices Within Payroll
- What other organizations are doing
- Technology and best practices
  - Managing technology
  - Emerging trends in technology
  - Cloud computing
  - Changing role of information technology (IT)
  - Emergence of self-service applications and tools
  - Self-service models
  - Direct deposit/payroll cards – electronic payments
  - Paperless payroll
  - Time and attendance
  - Web-enabled applications
- Other technology that enables best practices
  - Mobile applications
  - Data security
  - Next generation remote worker tools
  - Trends in mobile technologies
  - Communication breakdown
  - Biometrics
  - Advantages of biometrics
  - Types of biometric devices
  - Electronic document imaging
- Best practices: payroll processes

Benchmarking and Best Practices
- Best practices and correlation to benchmarking
- Types of benchmarking
- Quantitative versus qualitative benchmarking
- Find comparable organizations – measuring “apples to apples”
- Importance of complexity ranking
- What to measure
  - Quantitative
  - Qualitative
- Problems/Issues = poor benchmarking scores
- Approach to benchmarking – some examples of measurement

Benchmarking – common errors to avoid
- Start benchmarking with manageable chunks
- Benchmarking is a two-way street
- Standardizing definitions for benchmarking
- Dashboards

Securing Support for Your Best Practices Initiative
- Importance of securing support
- Strategic planning
  - Values
  - Vision
  - Mission
  - Objectives/key results
  - Commitments
- Identifying barriers and risks
- Establish a best practices stakeholder committee
  - Committee mandate
  - Committee member roles and responsibilities
  - Committee profile/representation
  - Meeting frequency
- Creating an opportunity assessment
  - Opportunity and scope
  - Benefits
  - Required resources and stakeholders
  - Funding request
  - Duration
- Developing a business case
  - Key questions before beginning development of a business case
  - What is a business case?
    ▪ Executive summary and recommendation
    ▪ Purpose and objectives
    ▪ Scope
    ▪ Determining the recommended option
    ▪ Project plan of preferred option
    ▪ Project management
    ▪ Cost-benefit analysis
    ▪ Risk Analysis
    ▪ Conclusion
    ▪ Appendices
- Communication elements
- Active listening
- Individual behavioral patterns

Tools for Implementing Best Practices
- Team development
- Effective teams
  - Stages of team development
  - Stages of team development
  - Reaching the next stage of team development
- Team player styles
- Contributors
- Collaborators
- Communicators
- Challengers
- Project management
  - Determine “who” is on the project team
  - Determine “when” to implement your project
  - Determine technically “what” is needed to start the project
  - Determine “how” to implement the project
  - The project plan
  - Communication
  - Coordinate status meetings
  - Risks?
  - Be realistic
  - Impact on business total cost of ownership
- Issue identification and inhibitive thinking
  - Inhibitive thinking – problems, rules, assumptions
  - Brainstorming
- Quick hits
- SWOT analysis
- PEST analysis
- Process mapping
  - Why redesign?
  - Why process map – some of the key benefits
  - Developing a process map
    ▪ Determine the boundaries/parameters
    ▪ Identify and list the steps taken in the process
    ▪ Sequence the steps
    ▪ Draw appropriate symbols
    ▪ System model
    ▪ Check for completeness
    ▪ Finalize/validate the process map
  - Analyzing process flows
    ▪ Examine each step
    ▪ Review each of the decisions within a process
    ▪ Examine the rework (or return) loops within each process
  - View the process from the customer’s perspective
- System testing
  - Testing phases – defined
- Total cost of ownership
- Return on Investment
  - Calculating Return on Investment (ROI)
- Customer window surveys
### Implementing Best Practices for Processes and Technology

- Making it happen
- Best or better practices?
- Implementing new processes – some important considerations before you begin
- Approach to process change
  - Assemble your team
  - Affirming the vision for the future
  - Understand your current processes
  - Categorize the phases within the process
- Get the facts
- Determine your metrics
- Select the right processes for redesign – scorecard
- Redesign the process
- Create the plan
- Implement the plan
- Technology implementation
- Selecting payroll technology
- Why do you want/need a new system/technology?
- Approach to system/technology selection
  - Establish the project team
  - Select a hardware platform
  - Determine where/how the technology will be developed or delivered
  - Select a processing environment
  - Select interfacing versus integration
  - Prepare a high-level project plan
  - Conduct a current situation analysis to create a functional requirement document
  - Prepare a request for information (RFI)
  - Prepare a request for proposal (RFP)
  - Perform the evaluation
  - Select the system
  - Negotiate contract terms
  - Revise the project plan
- Mistakes to avoid
- System lifecycle strategy
- Documentation of policies, procedures, and systems
  - Types of documentation
  - Documentation is a project
  - What to include
  - Gathering the facts
  - Creating a “shell” document
  - Writing techniques

### Customer Service

- Trends in payroll influencing customer service
- Levels of customer service
- Factors that influence customer service
- The role of expectations
  - Strategies to build an exceptional customer service reputation
- Service delivery skills for payroll
  - Telephone skills
  - Voice mail skills
  - Email skills
- Specific customer service situations
- Move to problem solving, as that has always been your goal
- Skills for recovering when you didn't perform as promised
- Dealing with the employee who is wrong
- Delivering bad news
- How to instill quality customer service values

### Outsourcing as a Best Practice

- The forces driving outsourcing
- Benefits of outsourcing
  - Phases of outsourcing
  - How important is top management in implementing effective outsourcing strategies?
  - Obstacles to outsourcing success
  - How long does it take to perform an outsourcing initiative from start through implementation?
  - Is it necessary to use outside advisors (consultants) or “implementation partners?”
- Top 10 factors in vendor selection
- Top 10 factors in successful outsourcing
- Ten critical outsourcing shifts
- Hallmarks of successful outsourcing relationship management
- Business process outsourcing (BPO)
  - Is BPO just reengineering with another name?
  - What are the business forces driving BPO?
- The ASP/SAAS models – service through outsourcing
- Business service providers (BSP) – a hybrid outsourcing model
- Future trends in outsourcing
- Making the outsourcing decisions
  - Prepare a current situation analysis
  - Prepare a cost comparison analysis
- Choosing the right outsourcing provider
- Employee and manager self-service
- Security and confidentiality

### The Role of Business Continuity Planning

- Don't make recovery too difficult
- Making disaster recovery more comprehensive
- Benefits of a business continuity plan
- Steps to create a business continuity plan
  - Obtain top management commitment
  - Establish a planning committee
  - Perform a risk and business impact analysis
  - Establish priorities for processing and operations – “critical needs”
  - Determine recovery strategies
  - Perform data collection
  - Organize/document a plan and procedures
  - Develop testing criteria and procedures
  - Test the plan
  - Approve the plan
- Get involved and get results

### Change management

- Change process – critical stages
- Key questions to ask about change
- Change management – important do's and don'ts
- Using change agents – qualities and characteristics of effective change agents
- Dealing with negative reactions to change
- Studying all angles of change
- Resistance to change – how to overcome it
- What should you as the payroll leader/manager do?
- Change management – finding the right balance
- Change impacts – some examples that you will likely face
  - Communication planning
  - Affecting change through communication
- Communication goals and objectives
- Change versus transition
- Ways to manage transition
- Assess your organization's transition-worthiness