Implementing Payroll Best Practices
2021 Course outline

Module 1: Introduction to Best Practices
- What Are 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
    - Structure
    - Process
    - Data/Technology
    - Communication
    - Service
    - People

Module 2: Best Practices Within Payroll
- Best Practices – What Other Organizations Are Doing
- Technology and Best Practices
  - Managing Technology
  - Machine Learning/Artificial Intelligence
    - Bots
    - Robotic Process Automation and Chatbots
    - Data Automation
    - Payroll Applications
  - Emerging Trends in Technology
  - Cloud Computing
  - Changing Role of Information Technology (IT)
- Self-Service Applications and Tools
  - Benefits of Self-Service
  - Employee Self-Service Portals
  - Direct Deposit/Paycards—Electronic Payments
  - Time and Attendance
  - Exception Time Reporting for Exempt Employees
  - Nonexempt Employee Hours – Rounding
  - Time and Attendance Best Practice—Training
  - Time and Attendance Best Practice—Consistency
  - Web-Enabled Applications
- Other Technology Enabling Best Practices
  - Mobile Technology Trends in Digital Business
  - Mobile Applications
  - Remote Worker Tools
  - Trends in Mobile Technologies
  - Mobile Technology Policies
  - Communication Breakdown
  - Mobile Workforce State Income Tax Simplification Act
- Data Security
  - Data Storage Environments
  - Device Management and Security Solutions
  - Biometrics
- Best Practices: Payroll Processes
  - Identifying Phantom Employees
  - Approval of Time Entries and Corrections
  - Red Flags of Payroll Fraud
  - Internal Controls
  - Pay Cycle Frequencies

Module 3: Benchmarking and Best Practices
- Best Practices and Correlation to Benchmarking
  - Benchmarking Definitions – Administrative Versus Consultative/Strategic Activity
- Types of Benchmarking
  - Quantitative versus Qualitative Benchmarking
  - Find Comparable Organizations - Measuring Apples to Apples
  - Importance of Complexity Ranking
- What to Measure
  - Common Metrics
  - Quantitative Metrics
  - Qualitative Metrics
  - Problems/Issues = Poor Benchmarking Scores
  - Approach to Benchmarking – Examples of Measurement
  - Benchmarking - Common Errors to Avoid
  - Benchmarking is a two-way street
  - Standardizing definitions for benchmarking
  - Dashboards/Scorecards

Module 4: Securing Support for Your Best Practices Initiative
- Importance of Securing Support and Strategic Planning
  - Strategic Planning
  - Values
  - Vision
  - Mission
  - Objectives/Key Results
  - Commitments
  - Identifying Barriers and Risks
- Establishing a Best Practices Stakeholder Committee
  - Stakeholder Committee
  - Committee Mandate
  - Committee Description
  - Committee Member Roles and Responsibilities
  - Committee Profile/Representation
  - Meeting Frequency
- Creating an Opportunity Assessment and Developing a Business Case
  - Creating an Opportunity Assessment
  - Finding Technology
  - Developing a Business Case
  - What is a Business Case?
  - Total Cost of Ownership
  - Return on Investment
  - Calculating Return on Investment (ROI)
- Communication Elements
  - Active Listening
  - Individual Behavioral Patterns

Module 5: Tools for Implementing Best Practices
- Effective Teams
  - Stages of Team Development
- 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
  - Communicate, Communicate, Communicate!
  - Coordinate Status Meetings
  - Risks
  - Be Realistic
  - Impact on Business Total Cost of Ownership
  - Issue Identification and Inhibitive Thinking
  - Brainstorming
- Quick Hits
  - Short and Long-term Fixes
  - SWOT Analysis
  - New HRIS System Analysis

- – PEST analysis
- – PEST or SWOT
- Process Mapping
  - – Why Redesign?
  - – Why Process Map – some of the key benefits
  - – Developing a Process Map
  - – Analyzing Process Flows
  - – System Testing

Module 6: Implementing Best Practices for Processes and Technology

- Making It Happen
  - – Best or Better Practices?
  - – Implementing New Processes – Some Important Considerations
- A 10-Step Approach to Process Change
- Technology Implementation
  - – Selecting Payroll Technology
  - – Why Do You Want/Need a New Technology?
  - – 13-Step Approach to System/ Technology Selection
  - – Mistakes to Avoid
  - – System Lifecycle Strategy
- Documentation of Policies, Procedures, and Systems
  - – Documentation
  - – Types of Documentation
  - – Documentation Is a Project
  - – What to Include
  - – Gathering the Facts
  - – Creating a Shell Document
  - – Writing Techniques

Module 7: Customer Service

- Customer Window Surveys
- 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 Professionals
  - – Phone Skills
  - – Voice Mail Skills
  - – Email Skills
  - – Texting Skills
  - – Specific Customer Service Situations

- – How to Instill Quality Customer Service Values

Module 8: Outsourcing as a Best Practice

- The Forces Driving Outsourcing
  - – Benefits of Outsourcing
- The Three 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
  - – Is It Necessary to Use Outside Advisors (Consultants) or Implementation Partners?
  - – Top 10 Factors in Vendor Selection
  - – Top 10 Factors in Successful Outsourcing
  - – Top 10 Problems With Outsourcing Implementations
  - – Hallmarks of Successful Outsourcing Relationship Management
- Business Process Outsourcing
  - – How is BPO different from traditional outsourcing?
  - – 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 Outsourcing Trends
- Making the Outsourcing Decision
  - – Prepare a Current Situation Analysis
  - – Document the current payroll system
  - – Define the requirements for a new system
  - – Prepare a Cost Comparison Analysis
  - – Compare in-house implementation versus outsourcing
- Choosing the Right Outsourcing Provider
  - – Compliance
  - – Gain Sharing

- – Employee Support and Query Monitoring
- – Employee and Manager Self-Service
- – Reporting
- – Security and Confidentiality

Module 9: The Role of Business Continuity Planning

- Disaster Recovery or Business Continuity?
  - – Disaster Recovery or Business Continuity?
  - – Don't Make Recovery Too Difficult
  - – Making Disaster Recovery More Comprehensive
  - – Benefits of a Business Continuity Plan
- Ten Steps to Create a Business Continuity Plan
- Get Involved and Get Results

Module 10: Change Management

- The Change Process – Nine Critical Steps
  - – 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?
  - – Establishing Feedback Mechanisms
  - – Stakeholder Analysis
  - – Change Management – Finding the Right Balance
  - – Change Impacts You Will Likely Face
- Communication Planning
  - – Communication Goals and Objectives
  - – Change versus Transition
  - – Ways to Manage Transition
  - – Change Management Initiatives
  - – Assessing Your Organization's Transition Worthiness