

Implementing Payroll Best Practices

2022 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

Implementing Payroll Best Practices *Cont'd*

- 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