## Module 1: 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
    - 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/Payroll Cards—Electronic Payments
  - Time and Attendance
  - Exception Time Reporting for Exempt Employees
  - Nonexempt Employee Hours – Rounding
  - Time & Attendance Best Practice—Training
  - Time & Attendance Best Practice—Consistency
  - Web-Enabled Applications
- Other Technology That Enables Best Practices
  - Mobile Technology Trends in Today’s Digital Business
  - Mobile Applications

## 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

## 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
  - Establishing a Best Practices Stakeholder Committee
    - Stakeholder Committee
    - Committee Mandate
    - Committee Description
    - Committee Member Roles & Responsibilities
    - Committee Profile/Representation
    - Meeting Frequency
  - 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

---

© 2018 API Fund for Payroll Education, Inc. Program is subject to change without notice
Module 6: Implementing Best Practices for Processes and Technology

- 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 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
  - Telephone Skills
  - Voice Mail Skills
  - Email Skills
  - Specific Customer Service Situations

Module 8: Outsourcing as a Best Practice

- How to Instill Quality Customer Service Values

Module 9: The Role of Business Continuity Planning

- Disaster Recovery or Business Continuity?
- Don’t Make Recovery Too Difficult
- Making Disaster Recovery More Comprehensive
- Benefits of a Business Continuity Plan

Module 10: Change Management

- The Change Process – Nine Critical Steps
  - Key Questions to Ask About Change
- Change Management – Important Do’s
- Change Management – Important Don’ts
- Using Change Agents – Qualities and Characteristics of Effective Change Agents

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

Module 11: The Role of Business Continuity Planning

- 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 12: Change Management

- The Change Process – Nine Critical Steps
  - Key Questions to Ask About Change
- Change Management – Important Do’s
- Change Management – Important 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?

- Communication Planning
  - Communication Goals and Objectives
- Change versus Transition
- Ways to Manage Transition
- Change Management Initiatives
- Assessing Your Organization’s Transition Worthiness