

Advanced Payroll Analytics

COURSE OUTLINE

MODULE 1:

Using Artificial Intelligence in Payroll Analytics

- **Lesson 1: Introduction to Artificial Intelligence (AI)**
 - Technology change – big data
 - Branches of AI
 - What does AI technology mean for payroll?
 - Using AI
- **Lesson 2: Using AI to Predict Future Issues**
 - What is artificial intelligence?
 - Artificial intelligence, machine learning, natural language processing
 - Payroll's use of AI
 - Payroll/HRIS applications with generative AI
- **Lesson 3: Using Robotic Process Automation, Chatbots, and Machine Learning in Payroll**
 - The future of AI and RPA
 - How to take the first step
 - Purpose of AI, chatbots, robotics
 - Robotic process automation
 - Identifying the biggest payroll challenges and making the decision
 - What is a bot?
 - Limitations of AI technology
 - New mindset, new results
 - Business use cases for AI and RPA
 - Identifying a task for RPA
 - Benefits of RPA
 - The future of RPA
 - Generative AI
 - Getting started using AI
 - Barriers to adopting AI
- **Lesson 4: Effective Uses of Generative AI in Payroll**
 - What is generative AI?
 - What is ChatGPT?
 - How can ChatGPT or another generative AI be used in payroll?
 - How can payroll use ChatGPT?
- **Lesson 5: Using ChatGPT or AI to Develop Job Aids and Documentation**
 - Job aids
 - Documentation

MODULE 2:

Service Level Agreements

- **Lesson 1: Using Metrics and Analytics to Manage Service Level Agreements**
 - What is an SLA?
 - Service level agreement metrics
 - Common payroll SLA metrics
- **Lesson 2: Issue Resolution Metrics**
 - Critical business issues to address
 - Compliance issues
 - Reporting tools to measure standards
 - Develop metrics for SLA performance
- **Lesson 3: Customer Service Availability and Metrics**
 - SLA customer service metrics
- **Lesson 4: Tax Filing Metrics**
 - Tax filing metrics found in an SLA

MODULE 3:

Business Trends Analytics

- **Lesson 1: Overtime Hours and Payments by Business Units**
 - Trends in time worked
 - Data needed by managers
 - Business unit data
- **Lesson 2: Project Management Status and Trends**
 - Project management
- **Lesson 3: System Access**
 - Access and cycle time for onboarding
 - Access and cycle time for offboarding
- **Lesson 4: Using Analytics for Predictions, Forecasting, and Modeling**
 - Turnover
 - Leave of absence trends
 - Use of part-time, full-time, contingent workers, and contractors by business units
 - Vacation usage analysis (budget, when vacation hours are used, unlimited vacation)
 - Sick leave hours on Mondays and Fridays
 - Predictive payroll analytics
 - Projecting the organization's payroll expense

Advanced Payroll Analytics Course Outline *Cont'd*

- Preparing payroll expense budgets
- Recruiting payroll staff
- Payroll staff utilization
- Payroll staff scheduling

- **Lesson 5: Identifying Payroll Fraud**

- Overpayment of benefits

MODULE 4:

Using Analytics to Improve Payroll Operations

- **Lesson 1: Tax Notices**

- Trends in tax notices
- Trends in resolved tax notices
- Trends in tax penalties paid
- Trends in tax notices by types
- Trends in tax returns filed
- Trends in tax returns filed by type
- Trends in federal and state/provincial/local tax deposits
- Time spent in resolving notices
- Trends in corrections (amendments) federal and state/provincial/local

- **Lesson 2: Customer Service**

- Number of help desk calls per month
- Average payroll help desk calls per day
- Trends in help calls/emails
- Abandoned help calls/emails
- Percentage of abandoned help calls/emails
- Trends in response time to help calls/emails
- Days to produce a payroll payment resolving a paycheck error
- Top five help desk call/email drivers
- Help desk call volume by business unit
- Top five off-cycle payments reasons
- Off-cycle payments issued by business unit
- Trends in self-service usage

- **Lesson 3: Root Cause Analysis**

- Benefits and goals of payroll root cause analysis
- Root cause analysis basic process steps
- Why does the issue or gap exist?
- Potential gaps
- Root cause analysis and gap analysis tools

- **Lesson 4: Payroll Training**

- Training utilization (training hours per payroll employee)
- Training utilization trends

MODULE 5:

Presenting Payroll Analytics to Senior Management

- **Lesson 1: Sharing Analytics Using Visualizations**

- Importance of data visualization
- Data visualization best practices
- Visualizations that work
- Visualization tools

- **Lesson 2: Making the Presentation to Senior Management**

- Keys to presenting to senior management
- Preparing the presentation
- Being a persuasive presenter
- Connecting with the audience
- Ensuring good ideas are accepted