Implementing Best Practices
2023 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