

BEYOND EXECUTIVE BUY-IN

HOW TO CONVINCING YOURSELF THAT YOU AND YOUR SMALL COMPANY NEED HELP

PRESENTED BY:



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MEET THE EXPERT



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Tricia Richardson, CPP, SPHR, SHRM-SCP has more than 25 years of experience in all aspects of workforce management (payroll processing, taxation, employee handbooks, human resources, benefits, etc.). Tricia is a Payroll and Human Resource “nerd” who enjoys reading Internal Revenue Code.

She is a Certified Payroll Professional (CPP) through PayrollOrg (formerly the American Payroll Association) a Senior Professional in Human Resources (SPHR) through the HR Certification Institute, as well as a Society for Human Resource Management Senior Certified Professional (SHRM-SCP).

Tricia is a Member of the National Speakers Bureau for PayrollOrg and a Contributing Writer to Paytech Magazine, a regular periodical provided to over 20,000 Members.

Agenda

Add Value With Tools and Solutions

Move from Transactional to Strategic

Roadmap for Successful Technology Implementation

Return on Investment



Add Value With Tools and Solutions

Plan & Recruit

- Staffing needs – alerts to managers when approaching certain hour thresholds
- Search the history of applicants for new recruits - database of skill sets
- Recruiting - save costs on outside vendors and use your own integrated system; applicants can be viewed by all employees that would be involved in the position hiring
- Automated and integrated applicant process
- “Knock-out” questions
- Workflows to expedite candidates through the system
- Automatic email responses, text notifications and interview scheduling
- Data flow from application
- Workflows for new hire events (equipment assignment, training, etc.)

Add Value With Tools and Solutions

Retain

- Comparative metrics with peers in the workforce
- Turnover trends (why is turnover happening?)
- Real-time reporting on workloads based on overtime reports that can be detailed to levels as “deep” as you need – move schedules, workers, or reassign work
- Earned Wage Access (on-demand pay)
- Scheduling reports can be viewed to include overlaps to minimize over/under-staffing
- Reporting - analytics, productivity, etc.
- Time off alerts to manage leave balances, ensure all shifts are covered and see trends

Add Value With Tools and Solutions

Train & Develop

- Employees can be trained to better understand how their paycheck works, taxation, etc. and mitigate that “my paycheck was wrong” angst
- Employee Performance Management – tracking issues and concerns electronically in each employee record; Performance Reviews tracked through Workflows and stored electronically for historical reference
- Expand on training topics, and personalize, for employees (stress management, ergonomics, etc.)
- Managers can be trained on using reporting, analytics and metrics to work strategically and increase the productivity of their departments
- Training updates tracked electronically; expiration alerts; electronically store certifications and backup documentation
- Ad hoc reports – if the data is there, you can generate a report

Add Value With Tools and Solutions

Compensate & Reward

- Combine compensation management with performance
- Step-by-step intuitive process for electronic benefit enrollment, AI to assist employees with choosing the best benefit options
- Provide automatic, scheduled reports to brokers (or give limited access)
- Email and text alerts as reminders
- Links to brokers for more information and help
- Deductions flow automatically to payroll
- Alerts – employees paid or not paid; threshold limits for wages and hours (audit)
- Track fringe benefits limits (tuition reimbursement, auto fringe, etc.)
- Total Compensation Statements

Add Value With Tools and Solutions

Budget

- Reporting on hours worked in cost centers vs budgeted hours
- Timekeeping automatically migrate to payroll allowing payroll the ability to complete detail audit reviews and reasonability of costs;
- Labor distribution reports for analytics
- Workers compensation cost management
- Integrate expense reimbursements with payroll
- General ledger – uploads and integration with accounting, alerts for unassigned amounts

Add Value With Tools and Solutions

Compliance

- Remain compliant with job advertising, application, interview and documentation requirements
- Ensure compliance with documented employee incidents (good and bad)
- Federal, State, Local and business-required trainings
- Manage independent contractors (new hire reporting, backup withholding, etc.)
- Compliance with tax payments and form filings
- Reporting for EEO-1, Vets 4212, OSHA 300 or Affirmative Action data
- State reporting requirements (metrics, wage reporting, etc.)
- Affordable Care Act – 1095's (track eligibility, codes, etc.)
- Documentation storage (emails, garnishments, supporting documentation for adjustments to pay, etc.)
- Paystub reporting requirements

Add Value With Tools and Solutions

Engage & Mediate

- Automated goal tracking
- Track employee uniform sizes, laptop information, etc.
- Empower employees to update and generate their own information - enter time, request time off, update tax forms, change direct deposit, address, etc.
- Shift coverage
- 24/7 access to paystubs, W-2s, 1095s
- Document storage (garnishments, health benefit forms, retirement allocation documents, jury summons, FMLA documents, etc.) – transparency with employee
- Enable employees to send positive feedback to others – share with everyone automatically
- Real-time accruals
- Send surveys to employees – find out what employees value and need

Move from Transactional to Strategic

Workforce Management Systems are inherently collaborative – leadership can work together to solve problems!

For example: After reviewing data, Human Resources has noticed an increase in turnover specific to a department. Exit interview summary information has shown a lack of confidence in leadership as a common theme. Performance management metrics have shown this same department has the lowest ranking reviews of any other department.

A meeting is schedule with leadership to discuss these metrics

There may be a management problem that can be solved to reduce turnover and increase productivity

Roadmap for Successful Technology Implementation

Consider the life cycle of the employee

- Applicant tracking
- Onboarding
- Benefit management (health, retirement, pet insurance, etc.)
- Compensation management
- Performance management
- Succession planning
- Learning and training
- Family Medical Leave (FMLA), injuries, accommodations
- Time and attendance
- Payroll and tax payments & Forms

Roadmap for Successful Technology Implementation

Processes and Departments

- Human Resources
- Benefits
- Payroll
- Accounting
- Technology

Consumers and Customers

- Employees
- Managers
- Vendors
- Technology



Roadmap for Successful Technology Implementation

Plan

- 2 months

Make a List

- What are you doing on paper, spreadsheets, by Email
- What vendors or solutions are you using
- What are your future plans and strategic goals
- Organize the list by “must haves”, “needs”, “wants” and “would be nice to have”
- Are there overlapping processes?

Budget

- Implementation costs as well as ongoing fees
- Vendor pricing may be “apples-to-oranges”
- Negotiate!
- Can you save money replacing redundant systems

Roadmap for Successful Technology Implementation

Plan

• 2 months

Vet Solutions & Tools

• 2 months

- Choose from fully integrated systems that are web-based, will work with your IT platform(s) and require two-factor authorization
- Ask peers for recommendations
- Provide the “list” to possible vendors (can narrow list to 2 or 3)
- All departments should attend demos – meet as a group to compare feedback
- Vendors’ Disaster Recovery Plan and SOC Audit
- State(s) with Local Taxes – make sure the system can handle these
- Can the system handle multi-State and Local taxation requirements

Roadmap for Successful Technology Implementation

- Prepare a timeline with vendor – work back from the 1st punch date (preferably new year for 1st pay)
- Request 1 project manager from the vendor and your company to coordinate implementation to streamline communication
- Stick to the List/Plan – building a house
- Deadlines should be non-negotiable – HOWEVER – do not let the vendor rush the process
- Make sure training is part of the timeline
- Choose employees from all levels and departments for testing (employees resistant to change, employees who thrive in change, employees not comfortable in technology)

Implement & Document

• 4 months

Test

• 1 month

Roadmap for Successful Technology Implementation

- Lock down security protocols
- Segregation of duties (not everyone should be able to do everything)
- Security by role, not individual
- Audit controls
- The system should be completely web-based with a mobile app that provides the same functionality as the web version
- Documentation – contingency, backup, efficiency – will demonstrate all that you do!
- Share your documentation with the vendor

Implement & Document

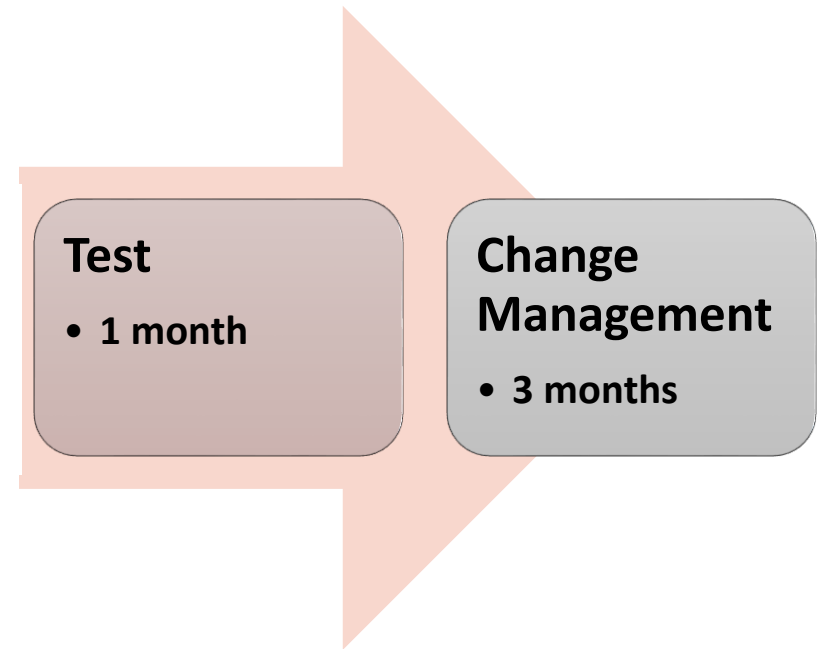
• 4 months

Test

• 1 month

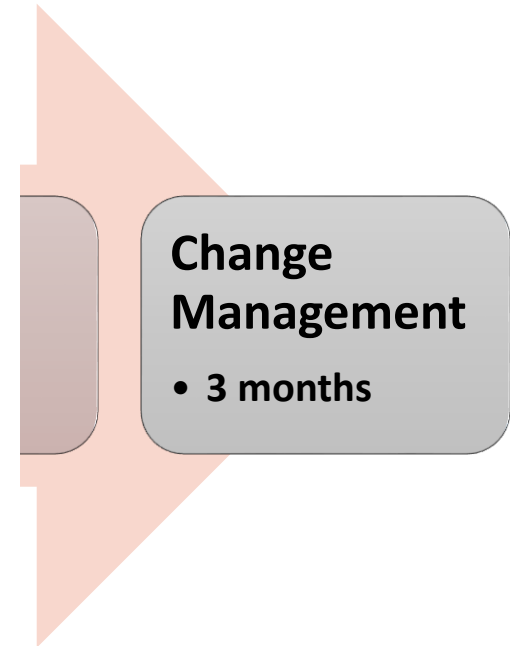
Roadmap for Successful Technology Implementation

- Try to break it!
- Parallel processes (all of them)
- Ask for "beta testers" (from all change-comfortable zones and roles)



Roadmap for Successful Technology Implementation

- Tell the story of the change (what, why, when, etc.)
- Relate to users - empathize
- Encourage and empower feedback
- Regularly check-in
- All voices are equal



Roadmap for Successful Technology Implementation

Compromise!

**Everyone will not get everything they want
– use the priorities outlined in the “list”**

**The current way may "work"
– but maybe we can do better AND do more!**

Return on Investment

- Collected vs paid benefit variances automatically identified – save money and time
- Increased productivity (engaged and empowered employees just work better)
- Employer “branding” will improve (employee satisfaction and diversity statistics, etc.)
- Reduced turnover costs – actively prevent employee concerns and issues
- Less opportunity for data-entry errors

**THANK YOU
FOR JOINING US!**

