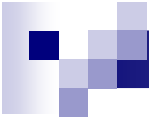


# Welcome MEET!!






# Ribbon Cutting Ceremony





# State of the Art Classrooms





THE  
NORTHSTAR  
CHAPTER

of the American Payroll Association

# HR and Payroll as Partners

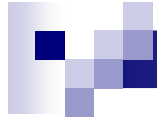
August 19, 2010

Robin Murphy, CPP  
Linda Obertin, CPP

# Agenda

- ◆ Today's Challenges for Partnering
- ◆ Generational Considerations
- ◆ Roles and Responsibilities of Partnering
- ◆ Effective Tools for Partnering





# Today's Partnering Challenges?



# Key Issues and Challenges

- ◆ Changes in Process, Organization, Technology
- ◆ Understanding each other's roles
  - Professional, Organizational, Functional
- ◆ Gaps and inefficiencies in processes
- ◆ Inclusion as a strategic partner
- ◆ Expediency and accuracy of data

# Introduction of a New Generation:

“In 2010 Millennials will out number Baby Boomers and Gen-Xers”

from The Millennials NYC



*Born between 1980 to 1999*



# Structure for the Millennial Workplace

- Monthly due dates
- Regular work hours
- Meetings with agendas and minutes
- Defined assignments and success factors
- Clearly stated goals
- Performance assessments and feedback
- Career pathing

# Generational Preferences

<i>Generations</i>	<i>Career Goals</i>	<i>Balance</i>	<i>Feedback</i>
<b>Traditionalist</b> <i>Born 1900-1945</i>	<i>Build a legacy</i>	<i>Support me in shifting the balance</i>	<i>No news is good news</i>
<b>Baby Boomers</b> <i>Born 1946-1964</i>	<i>Build a stellar career</i>	<i>Help me balance everyone else and find meaning myself.</i>	<i>Once a year, with lots of documentation</i>
<b>Generation Xers</b> <i>Born 1965-1980</i>	<i>Build a portable career</i>	<i>Give me balance now, not when I'm sixty-five.</i>	<i>Sorry to interrupt, but how am I doing?</i>
<b>Millennials</b> <i>Born 1981-1999</i>	<i>Build parallel careers</i>	<i>Work isn't everything; flexibility to balance my activities is.</i>	<i>Feedback whenever I want it at the push of a button</i>



# Ties to Technology

## ■ Never known life without the Internet

- 97% own a computer
- 94% own a [cell phone](#)
- 76% use [Instant Messaging](#) and social networking sites.
- 15% of IM users are logged on 24 hours a day/7 days a week
- 34% use websites as their primary source of news
- 28% author a [blog](#) and 44% read blogs
- 97% have downloaded music and other media using [peer-to-peer file sharing](#)
- 49% regularly download music and other media using [peer-to-peer file sharing](#)
- 75% of college students have a [Facebook](#) account
- 60% own some type of portable music and/or video device such as an [iPod](#).

Reynol Junco and Jeanna Mastrodicasa found that in a survey of 7,705 college students in the US



# Technology To Support Millennials

- Employee self service
- Manager self service
- Workflow
- Pay cards
- Electronic pay statements
- Electronic W-2's
- Webinars for education/on demand training

# Communication is Key

- Styles
- Tools
- Preferences





# Millennial Language

- AAK – Asleep at the Keyboard
- BI5 – Back in Five
- ADIP – Another Day in Paradise
- BTW – By the Way
- P911 – Parent Alert
- PAL – Parents are Listening
- 9 - Parent is Watching
- 99-Parents no longer Watching
- LOL – Laughing Out Loud



# Netiquete

- The majority of the expressions you see above are not acronyms, but rather shorthand used while text messaging or IMing.
- BTW: If you ever see someone TYPING AN ENTIRE SENTENCE IN ALL CAPITAL LETTERS that means SHOUTING! It is not proper netiquette to TYPE IN ALL CAPS (even in email), in fact, it's annoying. People with limited eyesight may use all caps to see the words better, but otherwise, TURN THE CAPS LOCK OFF, *unless you're using an acronym or shorthand.*



# Complaints ;-)

- AAAA –

- American Association Against Acronym Abuse

- <http://www.netlingo.com/acronyms.php>

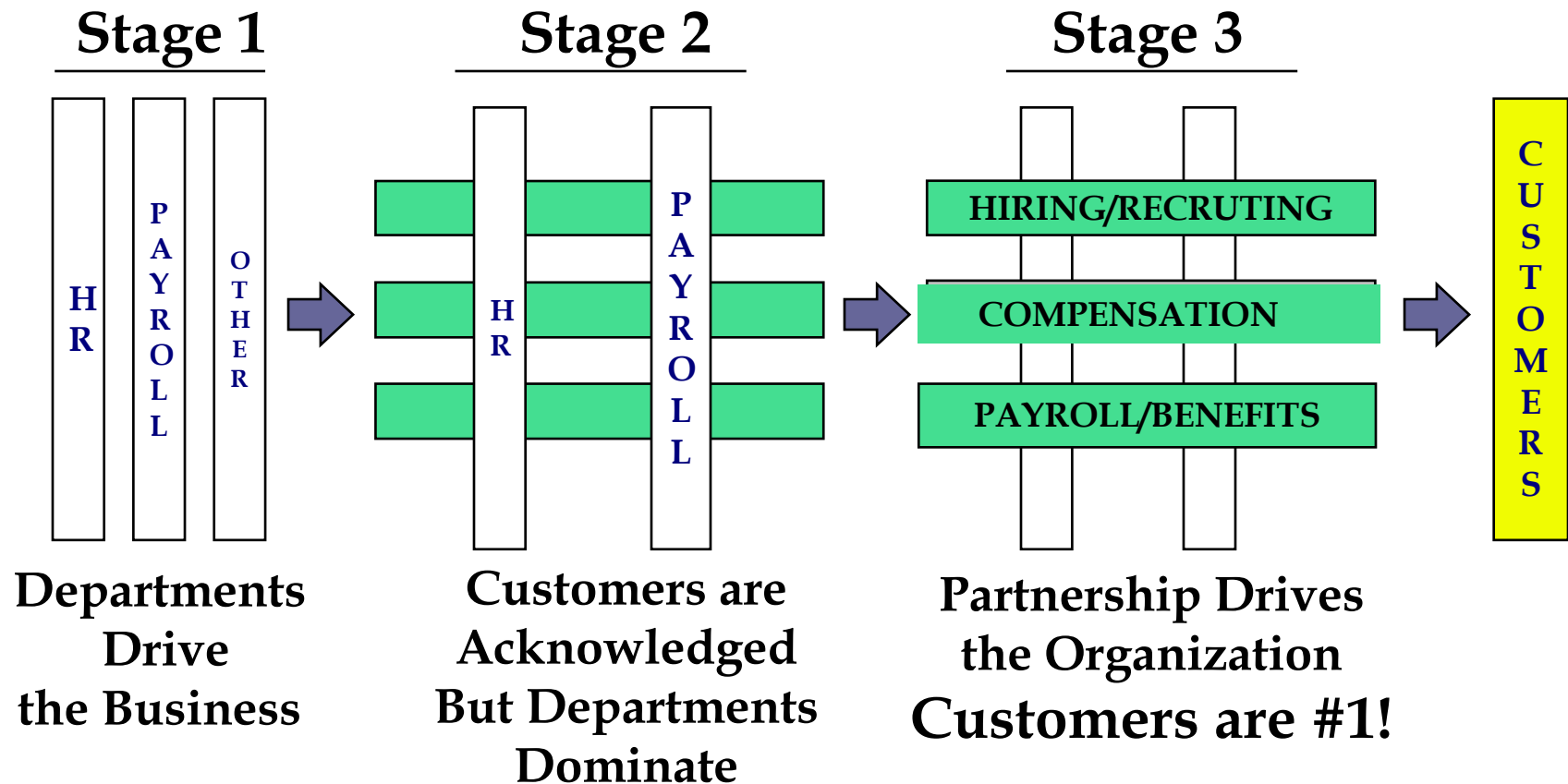
# Key Reasons to Partner WIIFM Factor

(What's in it for me/customers/company)

- ◆ Higher Quality
  - Reduction of Errors
- ◆ Timely Transactions
  - Reduction of Retro Activity
- ◆ Streamlined Process
  - Reducing end to end labor costs
- ◆ Satisfied Customers



# Best Practice Partnering Model





# Five Golden Rules for Partnering Success

1. Take action and involve others
2. Be a change agent and share ideas
3. Integrate seamlessly
4. Communicate constantly and consistently
5. Focus service on the customer

# Forums for Partnering

- ◆ Team Meetings
  - Each department brings one topic or need, express how other departments can assist
- ◆ Joint Sharing Luncheons
- ◆ Policy/Procedure/Legal Reviews
- ◆ Quarterly Status Meetings





# Activities for Partnering

- ◆ Walk-A-Mile
- ◆ National Payroll Week Activities
- ◆ Department Celebrations
- ◆ Type Assessments (Meyers-Briggs)
- ◆ Joint Recognition Awards
- ◆ Thank You's and Appreciation Notices



## Tools for Partnering: Ground Rules

- ◆ Begin meeting on time
- ◆ Safe environment for sharing ideas..  
    “what is said in this room stays in this room”
- ◆ All ideas are good ideas
- ◆ Develop plans on a consensus basis
- ◆ Track plans as a team
- ◆ Develop Joint Teams for plans/projects
- ◆ Develop an agenda for meetings
- ◆ Stay on agenda
- ◆ Send out meeting minutes/projects updates

# Tools for Partnering: Roles/Responsibilities

Role	Responsibilities
<b>Project Manager</b>	<ul style="list-style-type: none"> <li>➤ <b>Develops and manages all Project activities and deliverables.</b></li> <li>➤ <b>Provides weekly status updates for all audiences.</b></li> <li>➤ <b>Deliver projects updates to Steering Committee.</b></li> <li>➤ <b>Promotes and recognizes accomplishments.</b></li> <li>➤ <b>Defines all deliverables.</b></li> </ul>
<b>Facilitator</b>	<ul style="list-style-type: none"> <li>➤ <b>Provides high level process overview and addresses any questions from the audience.</b></li> <li>➤ <b>Walks through the targeted deliverables(s) step by step, and addresses any questions or concerns.</b></li> <li>➤ <b>Keeps the list of follow-up items, addresses all promptly and communicates back to the team</b></li> <li>➤ <b>Maintains sign off deliverables to confirm that all information has been finalized.</b></li> <li>➤ <b>Escalates all concerns to Project Manager.</b></li> </ul>
<b>Documentation Role</b>	<ul style="list-style-type: none"> <li>➤ <b>Takes detailed notes of the topic/process specifics that need to be incorporated into the deliverables.</b></li> <li>➤ <b>Prepares and coordinates deliverables on all materials and distributes for review.</b></li> </ul>



# Tools for Partnering: Processes/Policies/Procedures

- ◆ Review Processes
  - Health Enrollments
  - New Hire Orientations
- ◆ Look for Duplicate or Redundant Procedures
- ◆ Resolve Conflicting Policies
- ◆ Calendars

# Tools for Partnering: Surveys & Recognition



- ◆ Request feedback on your team
- ◆ Share information with other departments
- ◆ Involve other departments when they will be impacted
- ◆ Recognize efforts of other departments



# Tools for Partnering: Formalize the Partnering Expectation

## ◆ Position Descriptions

- Include Terminology:

- Liaison between HR/Payroll
- Partner with HR/Payroll
- Ensure open communication exists with HR/Payroll
- Knowledge of all HR/Payroll policies and procedures
- Team Player

## ◆ Assign a team member to attend department meetings of other functions



# Characteristics of Effective Partnering

- Clear goals
- Operate in an informal environment
- Each member has a role
- Disagreements are civilized
- Team consensus or unity on decisions
- Open communication
- Diversity within the team

# Case Study:

## Change in 401K Provider





# Working Session

1. Business decision is made by Human Resources/Benefits to change 401K Provider
2. Policy/Program changes may be made
3. Assumed there will be new/modified administrative procedures are implemented by HR, Payroll, Finance, Accounting who support 401K programs
4. New 401K plan information is sent to employees

# Your Mission



1. Determine how this change will impact your departments
2. Develop a list of the top 5 items your function will need to consider/modify for the change in benefit providers



# Case Study:

## Benefit Plans-Payroll Perspective

1. Determination of what systems will be providing information and how it is utilized.
2. Payroll may need to implement new feeds to/from payroll system.
3. New earnings and deductions are established for pre-tax and after tax income/withholdings.
4. Reconciliation (payroll checks, tax, liability accounts) completed.



# Case Study: Potential Risks When Both Parties do not Participate

1. Plan may not be implemented correctly-Corrections, Fines/Penalties.
2. Employees may be negatively impacted by not receiving timely and/or accurate information.
3. The impact on Payroll is not realized and may not be communicated until after the calendar/W-2 data has been processed.
4. W-2C's may be necessary, late tax deposits and filing information.
5. Restate earnings-SOX compliance for material events real time disclosure.



# Case Study:

## Wins When Both Parties Participate

1. Plan will be implemented correctly!
2. Employee information will be updated timely and accurately – no re-work.
3. Customers are serviced effectively and efficiently.
4. Payroll and HR have accurate reporting and accurate forms/returns and deposits, avoiding additional year-end stress.



# Business Processes

Source: The Employee Handbook For Organizational Change , Price Pritchett and Ron Pound

<u>New Hires</u> <ul style="list-style-type: none"><li>✓Introductory Periods</li><li>✓Benefits</li><li>✓Retro's</li></ul>	<u>Exempt Classifications</u> <ul style="list-style-type: none"><li>✓Exempt</li><li>✓Non-Exempt</li><li>✓Contractors</li><li>✓Students</li><li>✓Temporary</li><li>✓Part-Time</li><li>✓Seasonal</li></ul>
<u>Annual Reviews</u> <ul style="list-style-type: none"><li>✓Pay/Merit Increase</li><li>✓Promotion</li></ul>	
<u>Overtime</u> <ul style="list-style-type: none"><li>✓After 40 hours</li><li>✓After 8 hours</li><li>✓After 80 hours (8/80)</li><li>✓Collective Bargaining Agreements</li><li>✓Changing work weeks</li></ul>	<u>Compensation</u> <ul style="list-style-type: none"><li>✓Bonuses and Incentives</li><li>✓Commissions</li><li>✓Awards/Prizes</li><li>✓Collective Bargaining Agreements</li><li>✓Salary Adjustments</li></ul>



# Additional Business Processes

<u>Work Events</u> <ul style="list-style-type: none"><li>✓Promotions</li><li>✓Demotions</li><li>✓Transfers</li></ul>	<u>Other Compensation</u> <ul style="list-style-type: none"><li>✓Annual Leave</li><li>✓Sick Leave</li><li>✓FMLA</li><li>✓Jury Duty</li><li>✓Holiday Pay</li><li>✓Fringe Benefits</li><li>✓Stock Options</li></ul>
<u>Corporate Activity</u> <ul style="list-style-type: none"><li>✓Mergers</li><li>✓Acquisitions</li><li>✓Divestitures</li></ul>	

Source: The Employee Handbook For Organizational Change , Price Pritchett and Ron Pound

# ***Partnership: A Continuous Process***

