paytools

Cerebral Palsy ALLIANCE

HOW CEREBRAL PALSY ALLIANCE ARE REDEFINING PAYROLL MANAGEMENT

CUSTOMER SUCCESS STORY

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Recently, we heard from Daniel Watson (Senior Payroll Manager at Cerebral Palsy Alliance) to understand how he is setting a new standard for operational excellence in payroll.

In this article, we will outline how Daniel has transformed his payroll department with the use of Paytools, enabling his team to:

Reduce their time to run the payroll process by an entire day

Significantly improve development and onboarding for payroll team new starters

Embed better transparency and governance practices across payroll

But first, a little context..

About Cerebral Palsy Alliance

Cerebral Palsy Alliance (Est. 1945) is a non-profit organisation with 2,700 employees. Their team is dedicated to enhancing the lives of individuals with cerebral palsy.

The CPA payroll team, consisting of ten professionals, handles complex salary packaging and runs on a fortnightly pay cycle. They use a combination of Workday, Roster Space and Preceda as their core systems, as well as Microsoft Teams for communication and SharePoint for document/file management. CPA are moving payroll systems to Affinity and using Paytools to assist with the transition.

Payroll challenges CPA were looking to solve

- **No operational calendar:** CPA wanted a shared 'payroll ops' calendar showing detailed breakdown of recurring activities, deadlines and other commitments. This information resided with individual team members.

- **Manual payrun checklists:** Large, spreadsheet based run sheets including a pay run checklist that took 4 days to complete and comprised over 200 individual checks.

- **Payroll processes/work instructions on paper:** All documentation was in Word and stored in one individual's share drive. Processes were hard to find, version control and update.

- **Informal controls and audit:** No formal visibility of when processes were being completed and by whom. Also an inability to track when process changes were made and why. This was compounded when the team went to a hybrid work model.

- **Informal issue management:** Issues were logged in a spreadsheet relating to a broad range of topics: system and integrations, processing problems. Issues were hard to track or view the current status and actions.

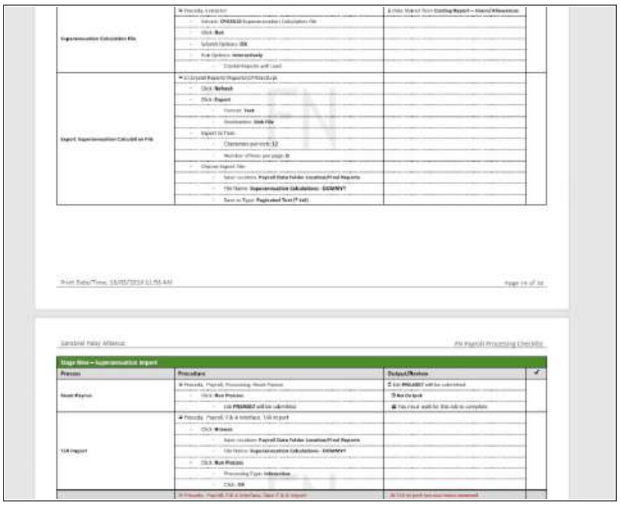
- **Risk management:** Managed via an excel spreadsheet and wasn't very effective.

Pay run processing

How payroll was operating before

CPA's payroll process was managed through a 30-page printed Word checklist (originally created in 2017), requiring manual updates and physical handling.

This out-dated way of working made the pay run process heavily reliant on memory and vulnerable to error, especially when key team members were on leave or had moved on.

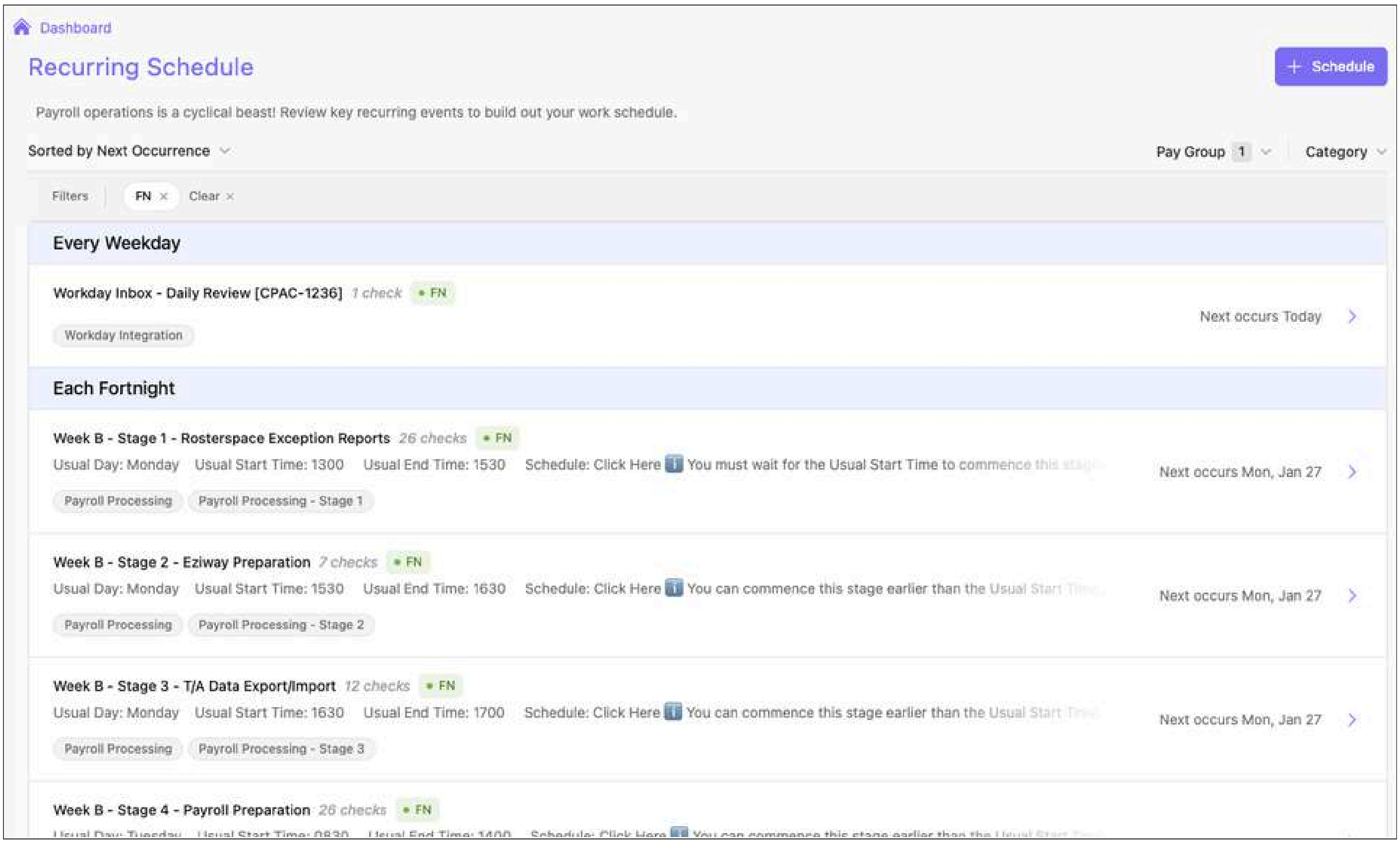


After being introduced to Paytools process management software, Daniel realised he could boost payroll efficiency quickly and without a huge investment - which then drove a business improvement initiative for CPA.

How payroll management looks now

Since starting their journey with Paytools CPA has transformed its pay run process. They have replaced their outdated manual checklist with a seamless online schedule with built in recurring events.

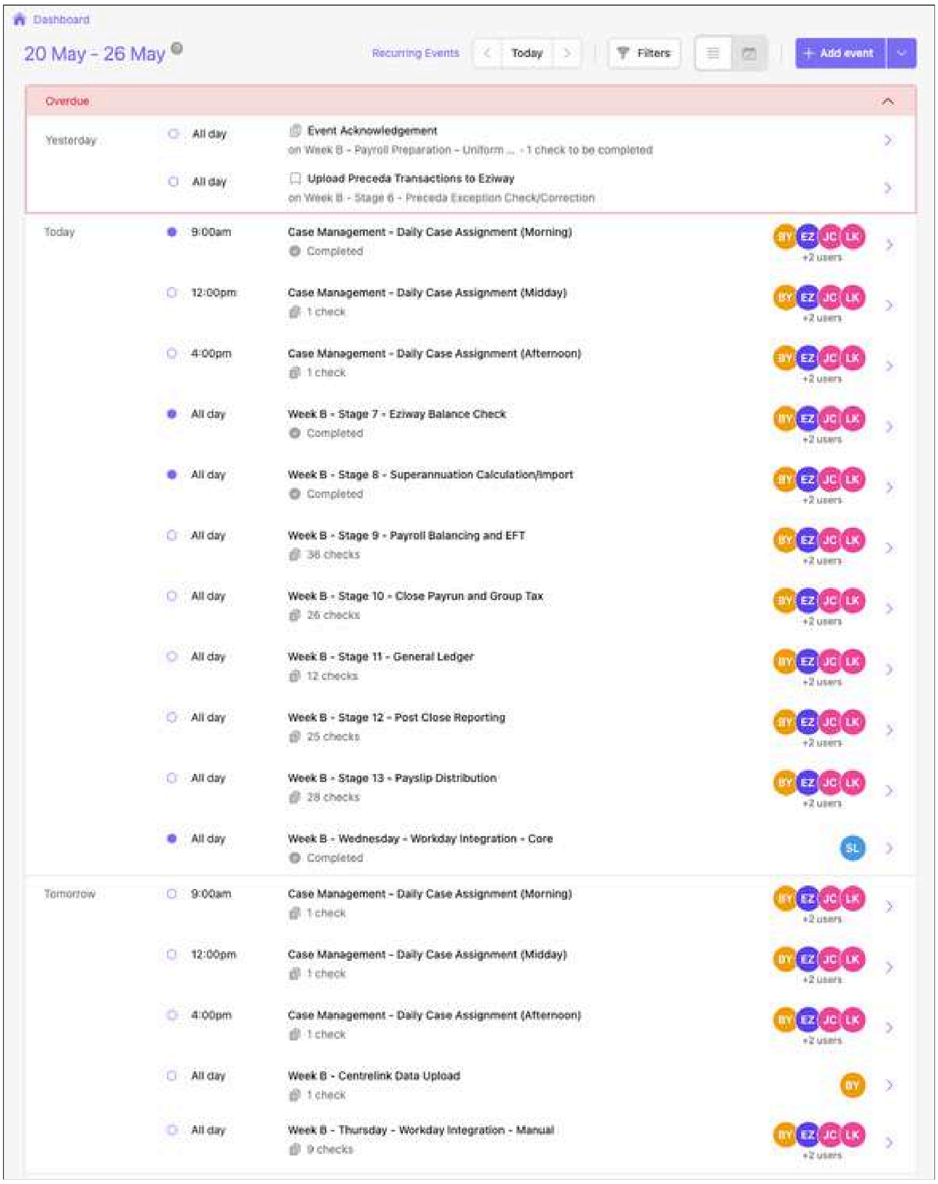
They now use a live, online calendar that includes all the tasks involved with the pay run, as well as other critical events that need to occur outside of the payroll process. Now the entire CPA payroll team is confident that they know exactly what needs to be done and when.



Before Paytools, we used to have to stay back until 7 pm on pay days to complete all tasks. Now we can confidently leave at 5 pm knowing everything has been completed accurately.

- Dan Watson, Senior Manager - Payroll

Flexible viewing options have allowed their team to have their assigned activities on a daily, weekly, or monthly basis. Here is an example of their weekly work schedule

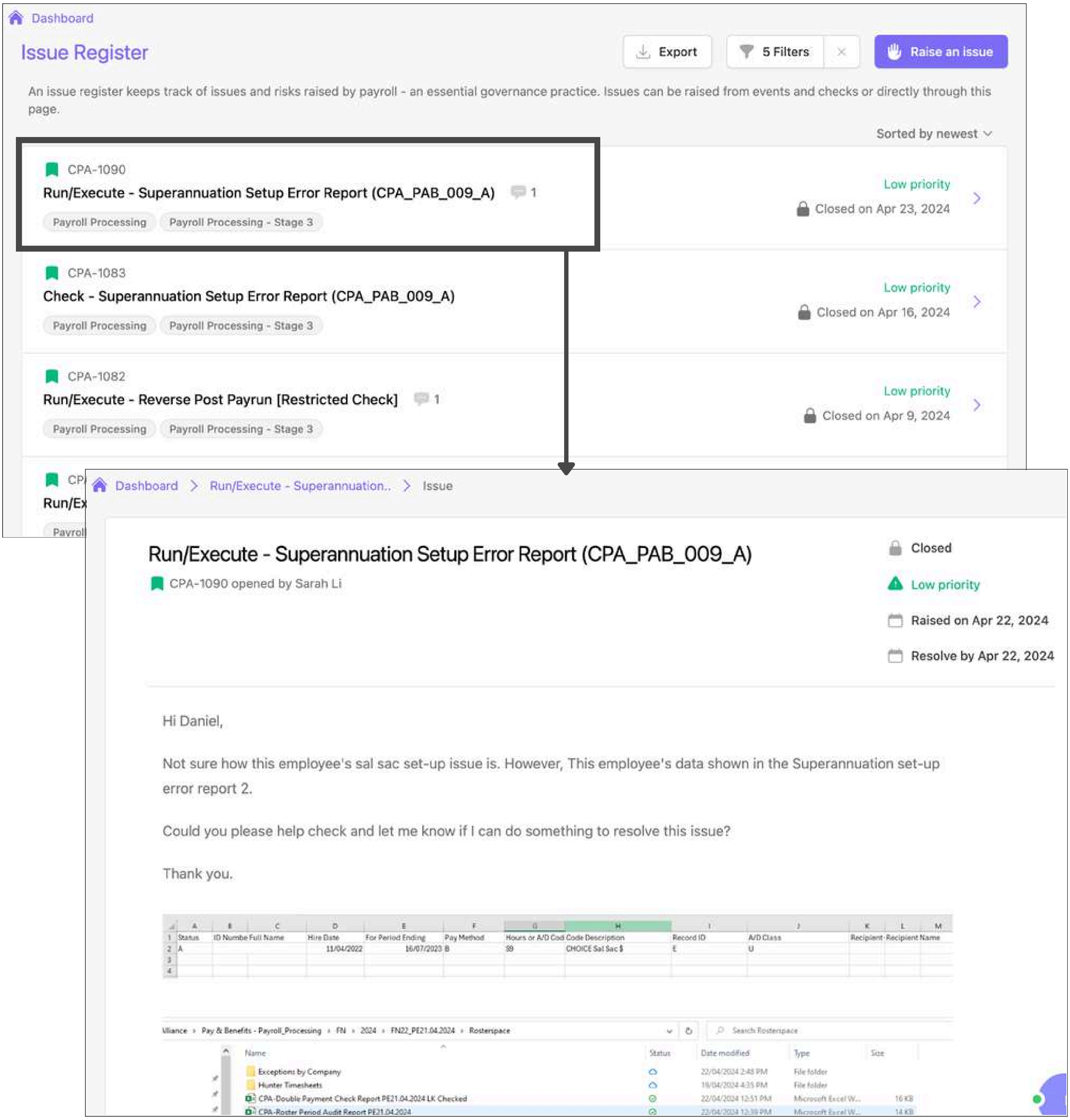


This provides information such as start time, who is responsible and highlights any overdue tasks that need attention first. When you create an event in Paytools you can also assign categories to it. You can then use these filters through the system to show you only the information you want to see.

Issue Management

The integration of Paytools has made issue management more proactive and structured. The system allows their team to automatically log and categorise all payroll-related issues, ensuring that they are auditable and actioned quickly.

This has helped to cull another Excel sheet and has helped to encourage continuous improvement and enhanced compliance.

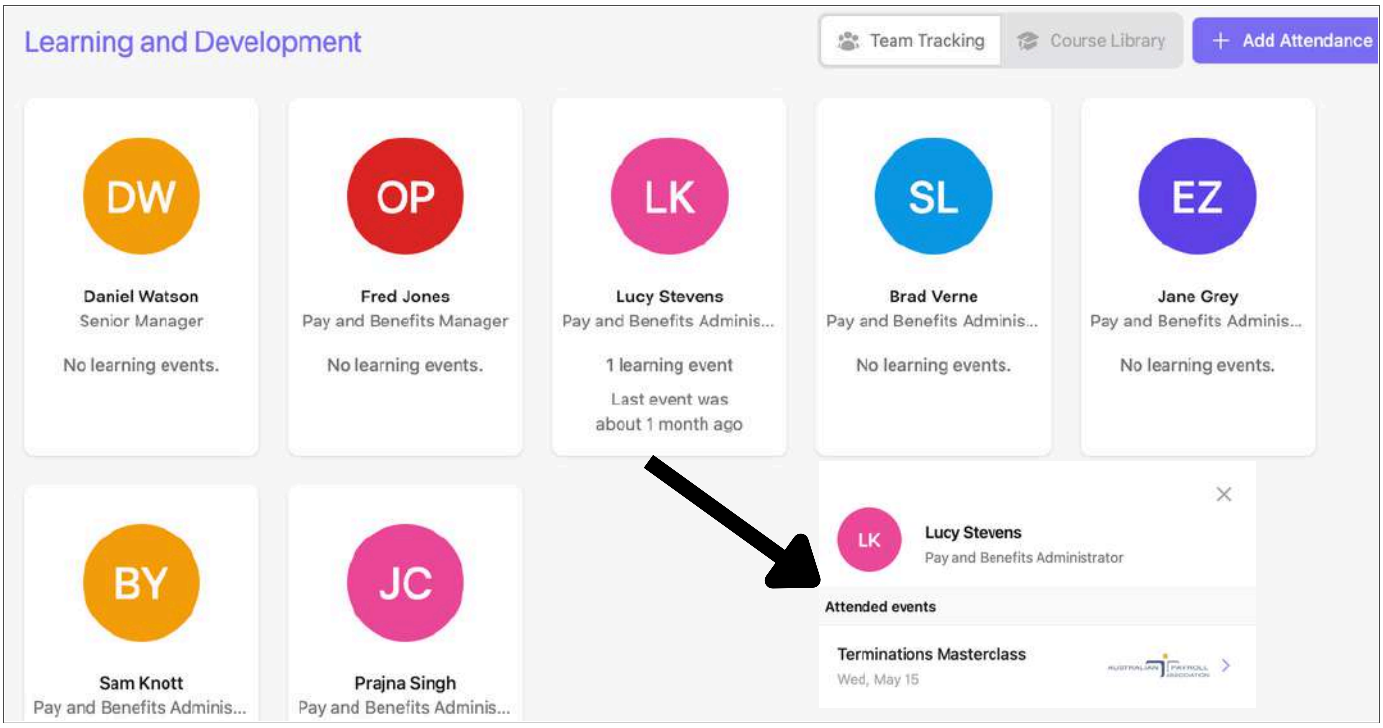


Issue Register in Paytools

Team Learning

The CPA team now also utilise the Learning and Development module as part of their increased investment into training. Daniel has found it to be a great way to know what courses are available (thanks to the course library), as well as easily track who and when one of his team members attended.

This proactive approach to learning and development not only enhances individual performance but also strengthens the overall capabilities of the team, aligning with CPA's commitment to excellence. For more insights on best practices for payroll learning and development, check out our blog.

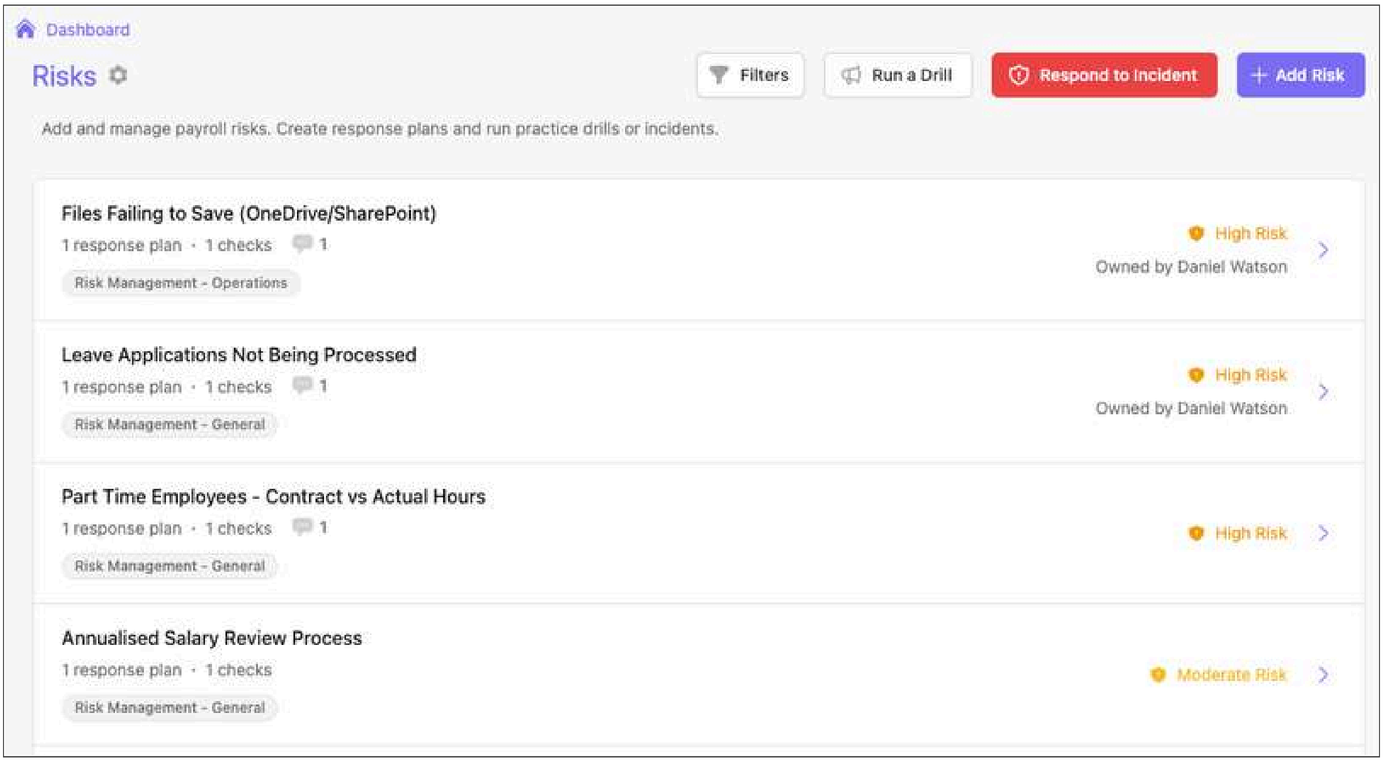


Learning and Development Module in Paytools

> **"A huge benefit of Paytools has been the improvement in team development and onboarding for new starters. What once took 6 months to perfect, can now be done confidently in just 4 weeks!"**
>
> **— Dan Watson, Senior Manager - Payroll**

Risk and obligation management

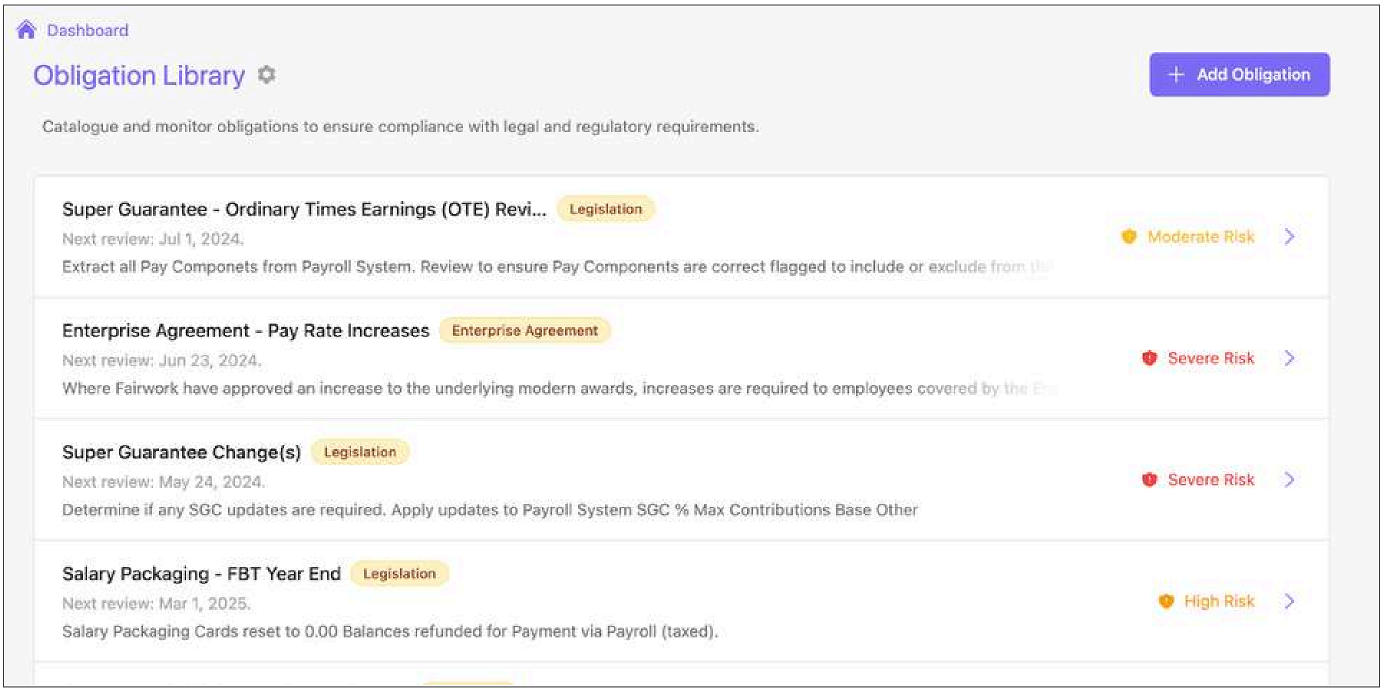
Risk management has also seen a major upgrade, shifting from storing risks in excel (where they were very rarely reviewed or updated) into a proactive process with response plans. This allows us the CPA team to document how they are expected to respond if there is an incident.



Risk Management Module in Paytools

They also use the obligation library to record and schedule less regular and non-BAU events. For example, they created an obligation to remind them to apply the Pay Rate increase process each year.

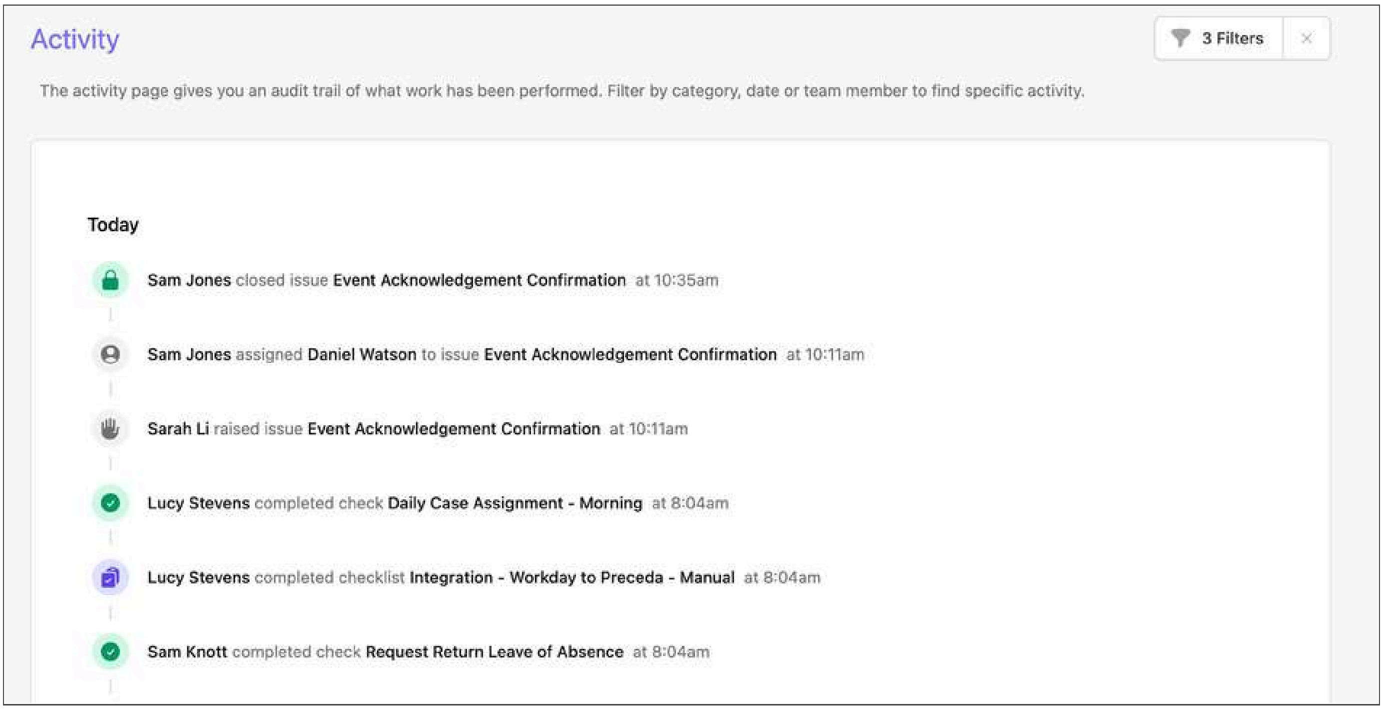
This was a significant improvement for CPA, as most of these events were never documented and were rarely at the forefront of anyone's mind. With each obligation you can clearly see the type of obligation, the jurisdiction it belongs to and any attachments.



Obligation Library in Paytools

Tracking activities for audit

CPA's ability to track audit activities comprehensively has greatly improved. Everything in Paytools is recorded in the activity log as well against checks. It is easy to filter the log to show activity for a specific date range, user etc.

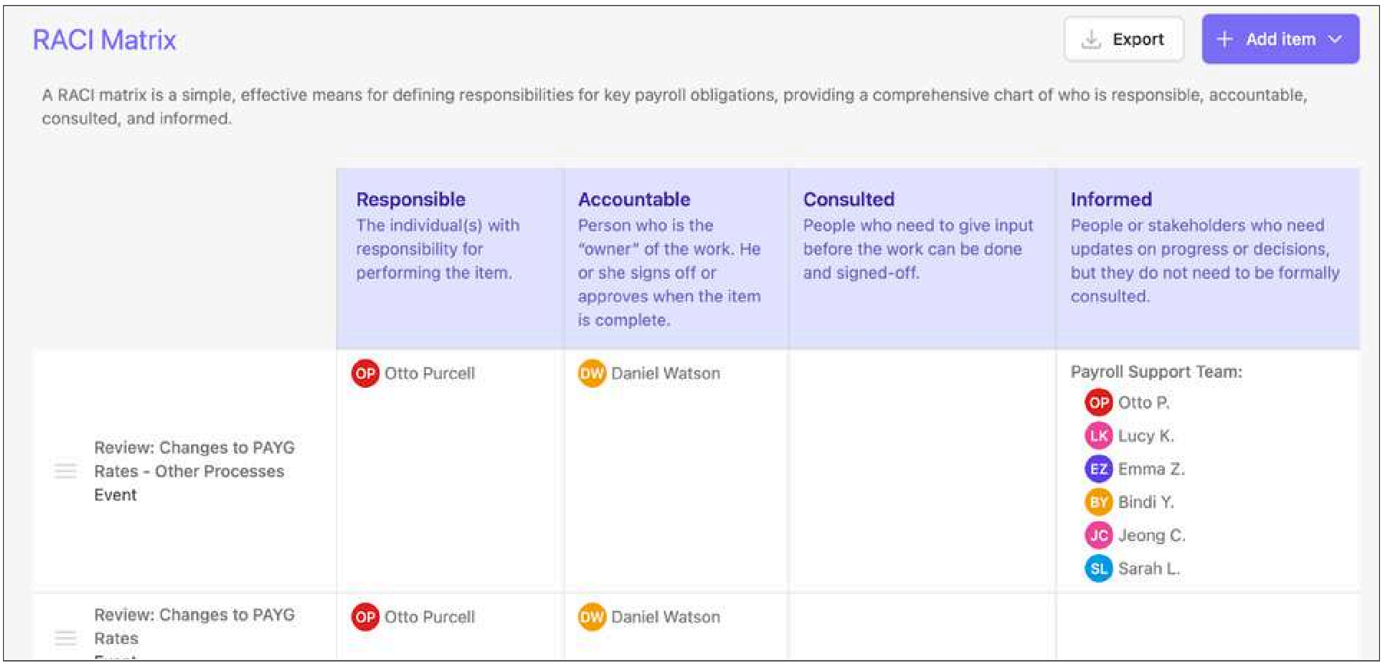


Audit Trail in Paytools

Role and Responsibilities

Once CPA had access to a working risk register and obligation library, they were able to quickly build a RACI matrix. This is great to show who needs to be engaged with and at what level of engagement is required for each risk and obligation.

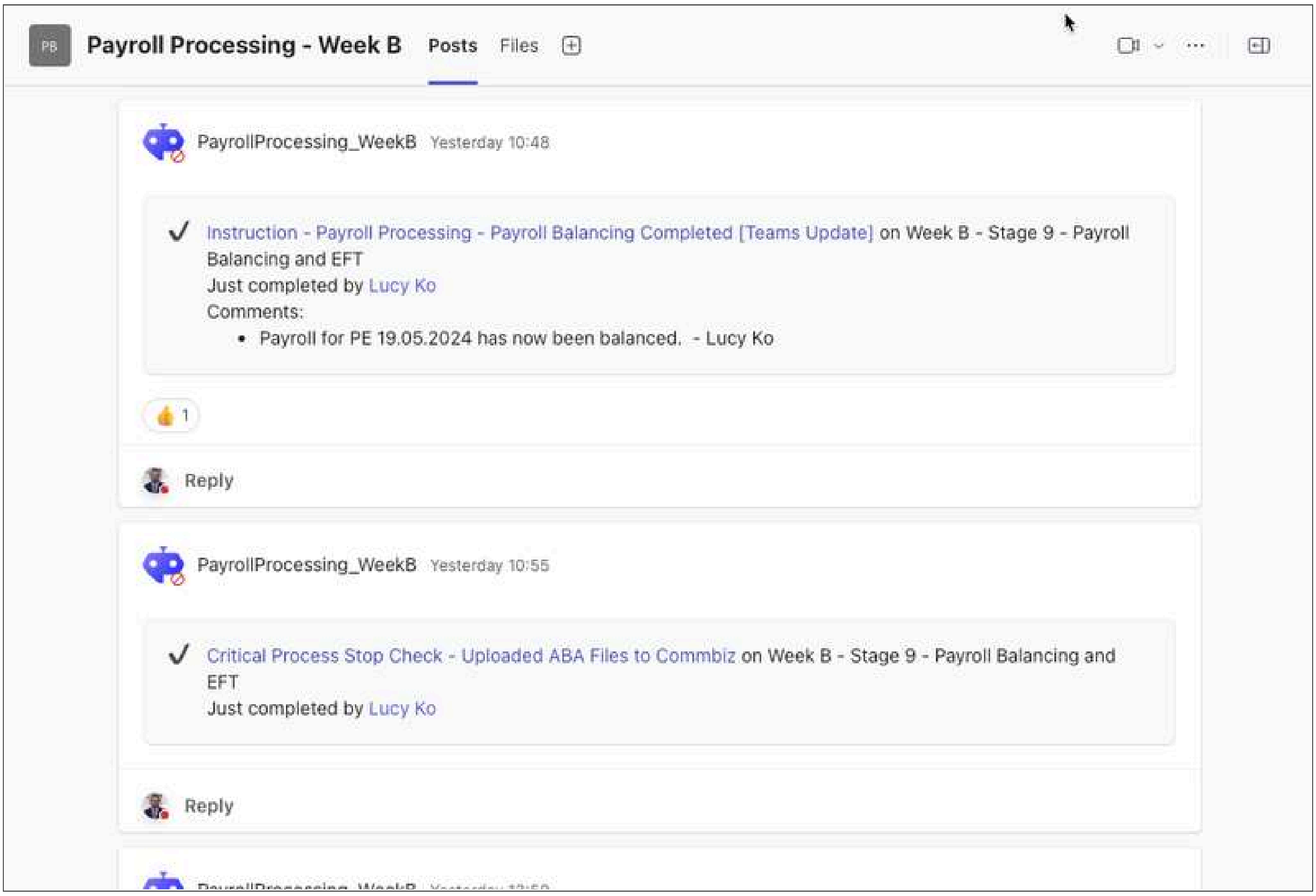
It has been particularly helpful in ensuring that their team keeps external parties informed, such as the CPO and CFO.



RACI Matrix Model in Paytools

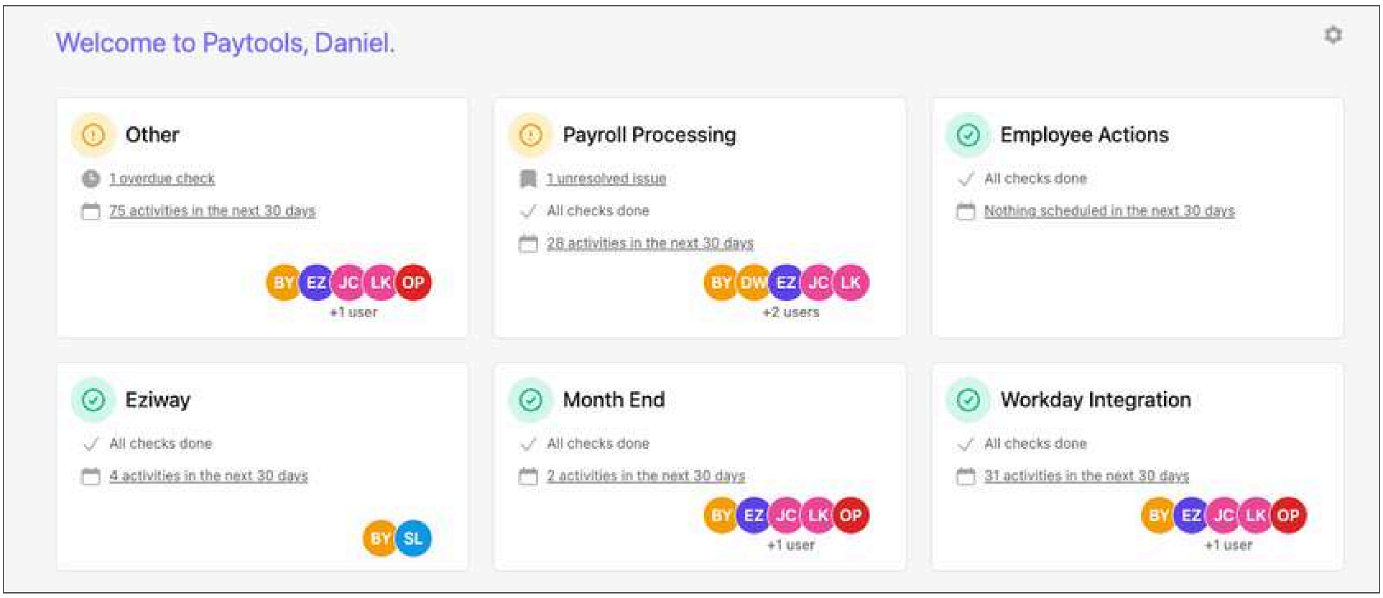
Monitoring and reporting

Payroll management has traditionally relied on verbal and online comms to get a sense of whether or not things are running smoothly. But Paytools has introduced an easier way. Since it's easier to use the tools you already have, you can integrate Paytools with Teams to send automatic notifications of what tasks have been completed and by who, as well as anything that might be overdue.



Automatic notifications sent via Paytools in MS Teams

Another easy way to track payroll management via the dashboard. This allows them to check on the status of every event within that category at a glance. The widgets also change colour if something is becoming overdue or is overdue.



Dashboard View in Paytools

Key business outcomes of using Paytools

The adoption of Paytools has led to significant business outcomes for CPA, transforming payroll efficiency.

- **Operational efficiencies:** Clear, concise and followed processes has allowed the CPA team to reduce payrun processing times by 30%.
- **Embedded governance:** CPA executive have confidence in the payroll function with full transparency of payroll operations, obligations, issues and risks.
- **Reduced burnout:** More efficient processes allow the payroll team to finish tasks by 5 pm, boosting morale and productivity.
- **Team up-skilling:** Training time for new staff has been reduced from six months to run a pay run, down to just one month!
- **Smoother system migrations:** With Paytools, CPA is set up for the easiest payroll migration project in history.

How CPA got started with Paytools

The journey with Paytools began with a conversation and product demo. Once Daniel was happy with what he saw, he invited the CFO to review the product and he was able to quickly understand how CPA would use it and how it would benefit the organisation.

They treated Paytools more as a subscription service which allowed them to bypass the usual process when purchasing software. They were able to do this primarily because Paytools does not store identifiable data (at most it stores employee name and ID) and it complied with all of the tech and security requirements. Given this and the fact that the cost was not significant, CPA were able to get it quickly approved.
Implementation kicked-off straight away and we started with payroll processes. We imported all their Word process documentation into Paytools and the CPA team took this as an opportunity to clean up each process as they reviewed it.

For the first three payroll cycles, the CPA team used the paper checklist in conjunction with Paytools to ensure that everything ran smoothly. Any issues found were reported using the Issue Register.

Once they were happy with the payroll processes, they continued to build it out from there.

What's next?

The payroll team at CPA have been incredible to work with. They are continuing to enhance their Paytools environment almost every day! More recently they have added:

- Month end superannuation processes
- Additional approval workflows that are currently managed via email
- Reviewing and updating all risk and response plans to align with corporate governance policies
- More detailed checklists to assist with the review of annual obligations
- And there will be much more to come!

To learn how Paytools could help you transform payroll management within your organisation, book a demo today!

Paytools is Australia's first dedicated payroll process management software

Paytools is built for modern payroll teams to plan, manage and optimise payroll operations. Centralise everything into one secure platform to reduce risk, improve governance and enhance efficiency.

Learn more