

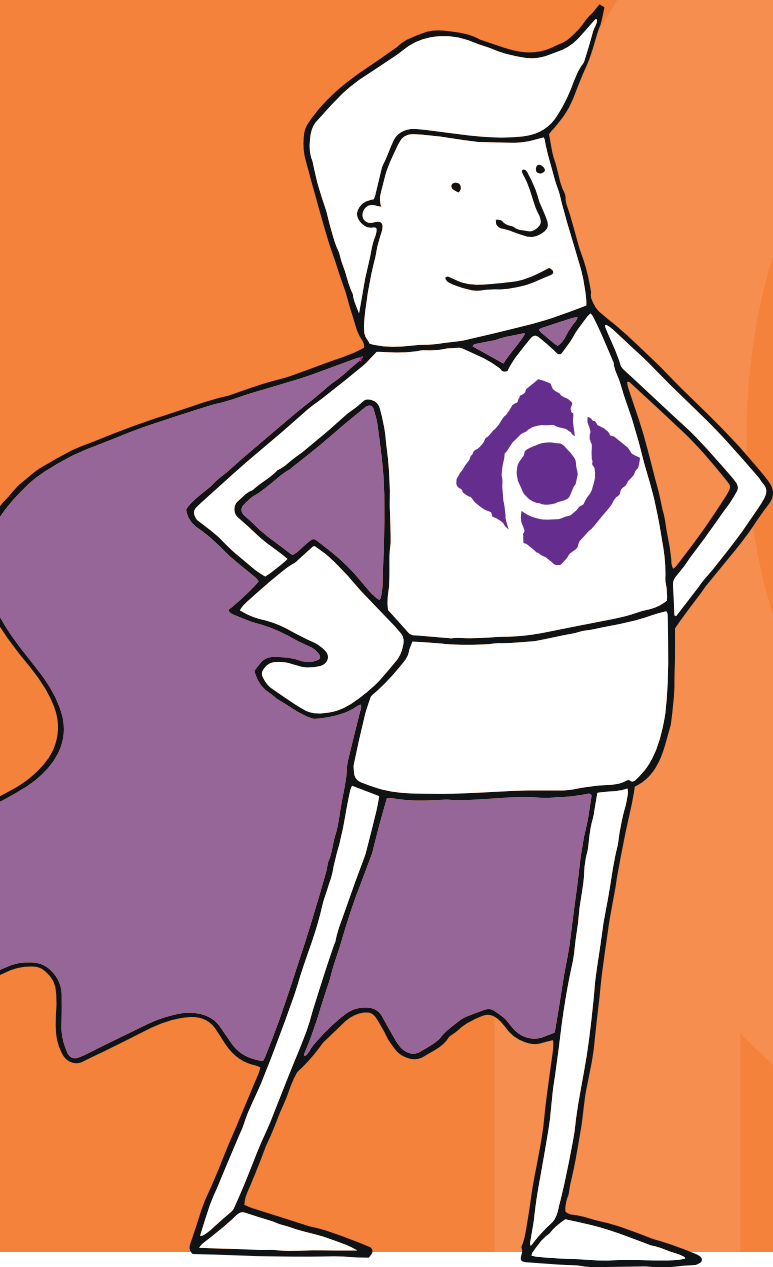
# YOUR ESSENTIAL GUIDE TO Payroll and Pension Management Outsourcing

EVERYTHING YOU NEED TO KNOW  
TO CHOOSE THE RIGHT PROVIDER



Are you struggling to keep up with the burden of payroll and pension compliance?

Has reliance on a small in-house payroll team made your organisation vulnerable?



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Could time be better spent working on your business, not your payroll?

Are you frustrated by the service provided by your current payroll provider?

Then it might be time to think about outsourcing your payroll to your friendly payroll heroes

# Choosing the right payroll and pension management provider has never been more important

The next decade is set to see unprecedented changes in the way we work. Technology such as AI will integrate into systems and processes to augment our working lives and take on the 'heavy lifting' of previously manual processes.

Your decision to outsource your payroll and pension management has already acknowledged that your resources could be better focussed elsewhere on your business. Today, outsourcing has moved on from a cost-cutting exercise to one that looks to add value.

## Intelligent payroll outsourcing

Payroll is a highly sensitive and mission-critical function. Outsourcing such a function requires trust in a provider. Trust that they will not only be compliant and accurate, that is a 'given', but also that they can make the process 'better'.

- Better insights.
- Better communication.
- Better integration.

Whatever 'better' means for you, you need to be working with a provider that can deliver this extra level of service.

## People passionate about payroll

One of the results of increased technology in payroll is that it moves it away from a people-intensive back office processing industry, to one where highly trained payroll professionals are able to provide a knowledgeable and personal service.

In other outsourced services, cost-cutting has resulted in a poorer experience, due to lesser skilled people delivering a one-size-fits-all approach. Payroll outsourcing is the antithesis of this; highly skilled specialists at the cutting-edge of the industry, working alongside clients, providing tailored solutions and a uniquely personal service.

## The value of data

The data generated from payroll is also increasingly being used to provide improved management information and bespoke reporting that can offer insights to help businesses make improvements far beyond a smooth-running payroll. Whether it is providing information on staff costs, absence management, wage levels or even productivity, by handing the payroll to a specialist outsource partner, the benefits to your business go much further than immediate savings.

**Stewart Waddell**  
Operations Director, Dataplan

“ I feel like I've got an extra valuable and knowledgeable team member - exactly how effective outsourcing should feel. ”

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# IS PAYROLL OUTSOURCING RIGHT FOR YOUR BUSINESS?

Payroll is one of those business functions that is essential yet undervalued. There is only the prospect of a negative effect when something goes wrong. When it runs smoothly, no one notices!

The likelihood of problems occurring increase with year-on-year compliance burdens and changes. With outsourcing, not only are you reducing the risks associated with non-compliance, you are opening opportunities to add value to this process.

## Compliance peace of mind

The changes and added complexities for payroll and pension management do not seem to be lessening. Keeping up with these changes and ensuring your payroll is compliant is challenging and the risk of getting it wrong has serious implications for your business.

Compliance is essential and having the security of working with payroll experts means it is one less thing to worry about. Your outsourced provider will keep up to date with the latest legislation and statutory requirements.

By selecting to work with a specialist payroll outsourcing company who has the necessary breadth and depth of expertise, you can ensure your payroll is managed by payroll professionals not payroll administrators. This is an important distinction and something you should be aware of when making your provider decision.

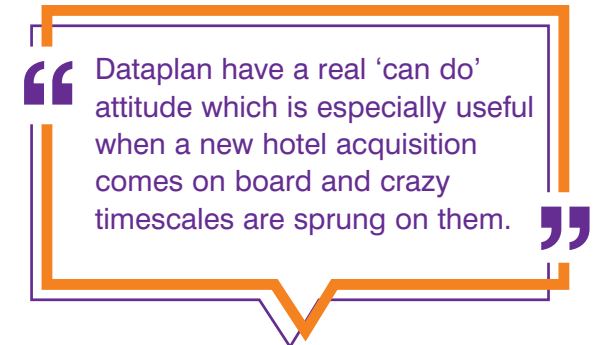
## Increased efficiency and accuracy

Despite often being viewed as a 'back office' activity, payroll is fundamental to the life of the organisation. If people don't get paid, the company will not exist in the very short term. If people are not paid accurately, it will have a negative effect on staff morale and motivation.

A professional payroll company will have the systems, processes and knowledge to ensure your payroll is accurate and processed with speed and flexibility.

## Reduce overheads

There are many hidden costs of processing payroll in-house such as staff salaries, recruitment, training and software. Payroll outsourcing can provide you with a transparent, actual cost of payroll, whilst alleviating the variable cost burdens associated with in-house processing.



### Reduce risk and vulnerability

Managing your payroll in-house will invariably mean that reliance is made on a few key staff who have the responsibility and pressure of processing the payroll. Not only does this rely on them having the correct level of experience and knowledge, it also leaves you vulnerable to times when they are not around due to annual leave, sickness absence or leaving the business.

By outsourcing payroll you will have a team of people who can step in and cover any staff absences, keeping your payroll running smoothly.

### Data security and continuity

Payroll data is extremely sensitive and, with the implementation of GDPR, the movement and storage of personal and sensitive data requires stringent processes and application.

In light of this, payroll providers have extremely high levels of data security. When choosing a provider, it is important that you look at what they have in place to protect your data.

Do they provide a secure portal for the uploading of your payroll data?

What is their process of handling employee queries?

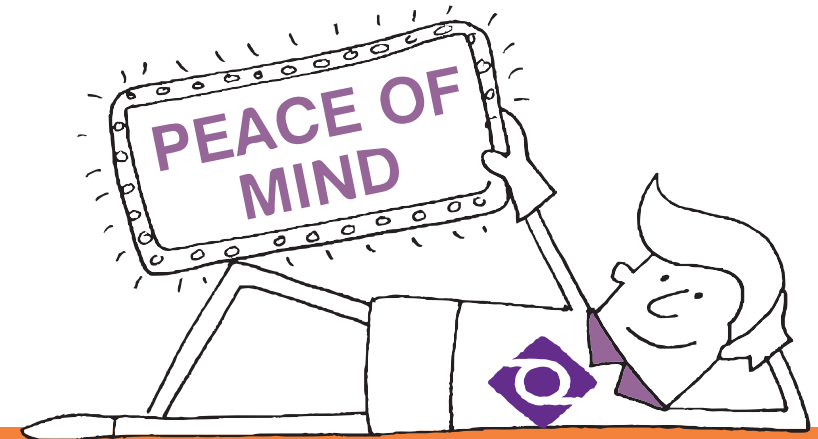
Do they have a robust business continuity plan that would ensure payment of your staff should the worst happen?

### Added value information

Finally, this may not be something that comes to mind initially, but it is one of the biggest potential benefits in outsourcing your payroll; the availability of management information.

By choosing a provider who can tailor the management information and reporting they provide, your payroll can bring rich and timely information to your business.

The data on absence, for example, can highlight potential health or morale problems. Information on head counts and salary costs may help you focus on productivity or recruitment activities. And the data for requirements such as Gender Pay Gap Reporting, all come from your payroll data.



### What if you are already outsourcing your payroll?

Even if you have already made the decision to outsource your payroll and are with a payroll provider, it is always worth reviewing whether you are getting the appropriate levels of service and asking what more can they provide to add value.

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# COMMONLY ASKED QUESTIONS AND CONCERNS

With such a time critical process as payroll, the thought of moving to another company to handle it whilst still hitting payroll commitments can be daunting. After all, every organisation has its own systems, procedures and idiosyncrasies.

A good outsourced payroll provider will be used to the needs of different types of businesses and will provide a quick and seamless changeover. Here are some of the most common concerns and questions we are asked by clients when looking to outsource, whether from in-house or another payroll provider.

## **“Will we lose control of the payroll?”**

The nature of outsourcing is that you are handing over a function to a third party. This doesn't mean you are losing control. In fact, far from it. You are placing your payroll in the hands of people who specialise in payroll processing. And, even though they are handling your payroll, no payroll will ever be processed without your final approval and sign off.

With a fully managed payroll service you retain complete control over your payroll, it is just managed elsewhere. You gain expertise and no loss of control.

## **“Will we still need some in-house payroll expertise?”**

With a fully managed solution, your only responsibility is to appoint a payroll contact who knows your business and who will liaise directly and be the point of contact for the payroll outsourcer.

This person is responsible for providing the payroll information needed at the agreed timescales and approving the processed payroll. Any staff queries can be handled by either the payroll provider or employer and who is dealing with such queries should be discussed with any potential payroll partner.

## **“How flexible will the process be?”**

You might assume that by having your own payroll member of staff it will give you more flexibility. This often isn't the case as they may not have the depth of expertise. A payroll provider should be able to make recommendations regarding improvements to the workflow within your business but these should still wrap around your current systems.

## **“Will the service be reliable?”**

Picking an outsourcing business that specialises in payroll will ensure high levels of reliability. They will be processing payrolls for many companies every month, generating thousands of payslips and will be experienced and knowledgeable about payroll issues or situations.

If you are in a specialist sector, such as charity or hospitality, where there are additional payroll complexities, look for a provider with a track record in this area.

Make sure you know who will be handling your payroll on a day-to-day basis and that they have the necessary expertise and knowledge.

### “Will my sensitive data be secure?”

One of the initial worries businesses often have when considering outsourcing is the confidentiality of their payroll data.

There is a fear that data sent and stored outside of their organisation could be vulnerable to access or loss if systems crashed or disasters happened. With the advent of GDPR this worry has been amplified.

The fact is that your data is probably far safer in an outsourced environment than at your own premises. Outsourced payroll providers invest heavily in technology and infrastructures that protect their clients' data including robust encryption, back up and disaster recovery policies.

For your own peace of mind ask any provider about business continuity and if they have IT security accreditations such as ISO27001 in place.'

### “Will I be able to access my data to run reports?”

The answer to this depends on the outsourced payroll provider you choose.

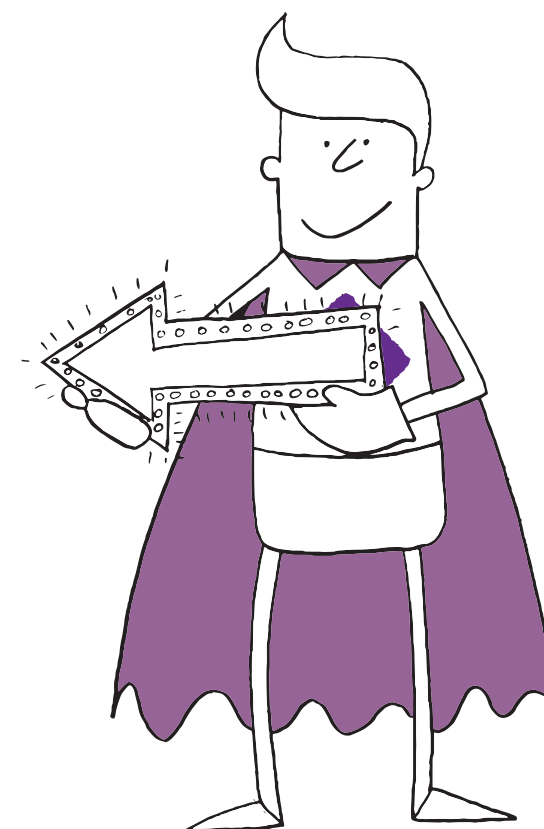
One area to be careful with is that often they may quote a very low 'per payslip' cost, but make charges for every additional activity they do for you, including running reports.

A good provider should be able to add value to your payroll data by supplying reports and management information, ideally bespoke to your needs. And, be upfront about the costs that you will incur for all the services supplied.

### “How much hassle will it be to change?”

Most businesses worry about the effect of moving their payroll to an outsourced provider and the impact this transition will have. Payroll is one of the time critical aspects of running a business and employees expect to get paid on time and accurately, so a smooth handover is crucial.

Outsourced payroll providers have project management systems and processes that are geared up to handle this change. As part of your initial meeting ask about this process and the anticipated timeframe for implementation.



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# HOW DO YOU CHOOSE THE RIGHT PROVIDER?

Although there are processes and data involved in payroll, don't forget that at the heart of a good outsourcing experience is trust in the provider and confidence in the people you are dealing with. For the arrangement to work there needs to be a solid understanding of the capabilities and services being provided.

## Specialist expertise

Underpinning the relationship must be trust that the payroll provider has the resources and technical ability to deliver a competent service.

But all payrolls are not equal and many industry sectors have special requirements or nuances of their payroll that require specialist knowledge and experience. It may be that there are variable contracts, short approval times or high numbers of non UK workers workers. Whatever the make-up of your payroll ensure your provider has the expertise to handle it.

## Supplier or partner?

The best approach is one of partnership.

You want to be working with a payroll provider who is not purely interested in short term gains. A company that is willing to spend the time to get to know your business is proactive in their recommendations and can grow and change with your business.

## Going the extra mile

Your provider should be open to being in contact regularly and be forward-thinking in the recommendations and information they give you. After all, the world of payroll is never a static one.

You should be given a dedicated named contact (or team) in order to give business continuity. And, like all good business partnerships, the outsourcer should build a relationship over time by staying close to your business so they become part of your team.

## Culture fit

An important factor in finding the right partner in any business area, but especially something as sensitive and crucial as payroll, is their attitude to people. What are their levels of staff turnover?

Do they give their staff the empowerment to deal with queries and be proactive for their clients?

Although some of the more pragmatic facts such as price will play a part in your choice of payroll partner, don't forget some of these 'softer' factors. If you are to build a long and successful partnership with your payroll supplier, these are areas that need to be considered at the outset.



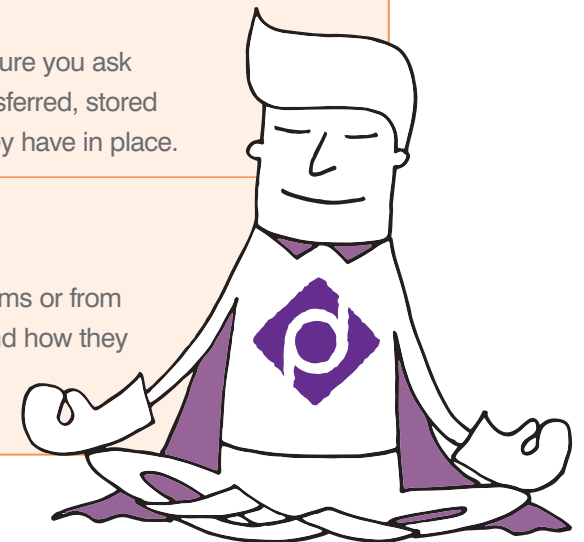
“ Makes life a lot easier, giving me time to concentrate on the day-to-day running of my business and I have the confidence that all will be done. ”



## Make sure you are asking the right questions

Before you decide on an outsourced payroll provider you need to make sure you are asking the right questions. Questions that will uncover the detail of the service they provide and ensure you are making the decision based on all the facts.

<p><b>Do they have relevant experience?</b></p> <p>What recent experience do they have of businesses or payrolls like yours? This may be experience of your sector or an understanding of some of the complexities or challenges you may have.</p>	<p><b>How transparent is their pricing?</b></p> <p>Unfortunately the payroll industry is plagued by headline grabbing 'per payslip' figures and many payroll providers are guilty of hidden costs, even when those extras are the essentials such as BACS and online filing.</p>
<p><b>Do they understand the specific needs of your business?</b></p> <p>Are they able to tailor the service to your specific requirements? For example, setting up bespoke reporting. Be wary of providers who have a one-size-fits-all approach.</p>	<p><b>Do they provide an ePayslip option?</b></p> <p>The move towards ePayslips means that even if you are not using now, it is likely to be something you will want in the future.</p>
<p><b>What added value services can they provide?</b></p> <p>Payroll is increasingly moving away from an outsourced process to a service that can add value. A progressive payroll provider should be able to offer additional services.</p>	<p><b>What security and business continuity processes do they have in place?</b></p> <p>Protecting your data is essential so make sure you ask about how securely the payroll data is transferred, stored and what business continuity strategies they have in place.</p>
<p><b>Do they have a secure online payroll system?</b></p> <p>Payroll data is sensitive and having a secure online system to upload and approve your payroll is not only easy, but also provides you with archive information at your fingertips. Ask what systems they have in place to provide such a service.</p>	<p><b>What is the transfer process?</b></p> <p>If you are moving from your in-house systems or from another provider, make sure you understand how they will handle the transfer of your payroll.</p>



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# DATAPLAN - YOUR PAYROLL HEROES?

We don't like to blow our own trumpet (well maybe a bit) and although we aren't the biggest payroll provider, we do aspire to be the best. Our philosophy is that to get really good at something you need to specialise. We are not a HR provider with bolt-on payroll, or a software provider expanding our business.

We have been processing payroll since 1969 and although we have expanded into aspects such as Auto Enrolment management and PAYE consultancy services, payroll remains at the heart of what we do.

## Let's talk about what we do differently

Because we aren't a massive, faceless bureau we can do things differently, and we often do. We can be flexible and agile and make sure we are not only reacting to changes in the sector, but are also at the forefront of the sector, leading on innovation.

## Service is everything

The message we get from prospects and new clients coming to us from other providers is that they want to deal with people. Not just any old people but people who know them and know their business.

That's why all our clients are given named contacts and teams. When you call you will speak to your contact who knows your payroll and your business. You will not be put through to a faceless help desk.

## Knowledge is king

We have invested in our education and training programme so that we can upskill throughout the business, training the payroll heroes of the future.

Many of our senior team are involved in industry thought-leadership and this is filtered down into the rest of the business. We don't employ sales staff, so the people you talk to are all experienced payroll professionals.

## Open and honest pricing

No confusion or bamboozling, we don't strip everything out just to headline a low payslip price, only to add it in as extras down the line.

The price we quote is the price you pay. Guaranteed.

## Technology driven

We believe that investing in people and technology creates the 'perfect storm' for excellent service.

Our in-house team of software developers are constantly looking at refining, improving and innovating; providing technology interfaces that make payroll faster and more efficient.

Our approach is to develop technologies that can do the 'heavy lifting' of payroll processing, leaving our people to do the things they do best such as building client relationships and providing an exceptional service.

ePaysafe is our online platform which allows the easy and secure online upload, approval and management of your payrolls.

Our ePayslips solution provides employees with electronic payslips plus many more relevant documents all accessible via our apps.

## Sector specialists

Certain sectors have specific payroll demands that add complexity to the process.

Whether it is understanding teacher pay scales for schools or managing weekly payrolls and timesheets for care homes, we have the experience.

- Education and schools
- Hotel, restaurants and pubs
- Charities
- Care and nursing homes
- Medical centres and GP's
- Recruitment agencies
- Security industry
- Solicitors and professionals
- Media, design and IT

“ I find the personnel I deal with helpful and knowledgeable, both on the PAYE systems and about my firm, and, most important, they are consistent. ”



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# OUR PROMISE TO YOU

Without happy customers, we don't have a business. Our business model is based on creating long-standing partnerships with our clients; building close relationships that allow us to deliver a highly tailored service. Our service is backed by our Client Charter, an independent Customer Services Team and robust data security.

## **Our 5 levels of Customer Guarantee**

We understand that placing such a business-critical process as payroll into the hands of a third party can be daunting. That's why we have developed a robust and comprehensive set of client guarantees called our Client Charter;

**Deadline Guarantee** We guarantee we will meet all your pay dates when you provide information in the agreed timescales.

**Compliance Guarantee** We guarantee all payroll and pension returns are filed on time and that your payroll and pension administration is fully compliant with the latest legislation.

**Confidentiality Guarantee** Our investment in information security, means you have peace of mind that all your staff's personal data is secure.

**No Surprises Guarantee** Our pricing structure is simple and transparent. There won't be any hidden charges or nasty surprises. If there is an occasion where additional charges would be applicable, we guarantee to agree with you in advance before we incur any additional fees.

**Price Guarantee** Our contracts are fixed annually. There are no further increases so you can budget your costs with confidence

## **Keeping sensitive and personal data secure is our priority**

With highly sensitive payroll information, the need for a water-tight framework of policies and procedures that include all legal, physical and

technical controls is essential as part of the information risk management processes.

**ISO27001 Accreditation** We are committed to ensuring that all information is safeguarded from loss, unauthorised access or misuse and have chosen to implement an Information Security Management System (ISMS) which uses ISO27001:2013 as a framework for protecting the information it holds.

The framework has been designed to maintain Confidentiality, Integrity and Availability of information assets and provide effective risk management.

Achieving accredited certification to ISO27001 demonstrates that Dataplan is following information security best practice, and delivers an independent, expert assessment of whether our data is adequately protected.

**Going even further with ISAE3402 External Audit** As part of our framework of policies and procedures Dataplan undertakes an ISAE 3402 Type 2 Service Organisation Control report.

This is undertaken by external, independent auditors and is designed to give the users of Service Organisations, our clients, assurance over the design, implementation and operating effectiveness of the internal controls.

**Business Continuity** You need to be confident that whatever happens we are able to meet your payroll deadlines and pay your staff on time. Our triple level backup system is second to none in the payroll field and in the event of a disaster such as fire, flood, power failures we can be up and running within three hours.

# STRESS-FREE PAYROLL TRANSFER

Whether moving from your own in-house provision or another payroll outsource provider, payroll is a time-critical activity and many organisations are concerned about the impact of the transfer. Your employees need to be paid on time every pay period so there are understandable concerns about how a changeover could potentially cause delays or inaccuracies.

At Dataplan we have developed our 5D implementation approach which includes structured stages to ensure a smooth and stress-free transfer.

## d1 DISCOVER

The discovery phase is one of in-depth exploration. We gain a fundamental understanding of your business and workforce including any current and future issues that need to be overcome.

## d2 DEFINE

In our developmental stage, we plan out what processes will be needed in order to deliver the payroll solution you require. We will map out the process, including all the points of interaction with the organisation, its employees and your Dataplan team. This is where we will complete the practical processes before data capture commences.

## d3 DATA

Payroll is complex and requires a lot of data. The data capture phase includes previous providers, pension providers and your organisation. This is an essential stage to ensure all data is correct before commencing with the payroll.

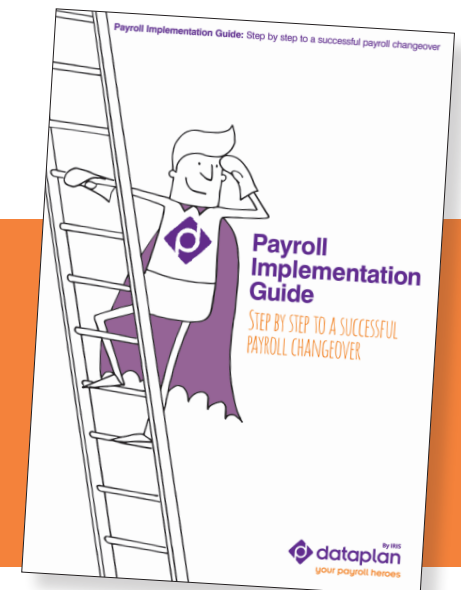
## d4 DUMMY RUN

Before we go live we will carry out parallel runs to ensure inputs, outputs and net pay calculations are as expected. We would agree at the outset the requirements and number of parallel runs that we need to produce here.

## d5 DEPLOY

The delivery phase runs from the 'go live' date and continues to the point where all sides are happy to progress through to our processing teams. Within this initial period, we will be reviewing and making changes if required to make sure all of your outputs are met.

If you would like to find out about our 5D Implementation approach, please contact us and request the in-depth Implementation Guide.



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# INNOVATION IS OUR MIDDLE NAME

As a dedicated payroll business, we aim to provide leading edge payroll services and are constantly looking to embrace the possibilities that new technologies can offer.

The internet, smart phone technology and AI offers fantastic opportunities to streamline and enhance the outsourced payroll experience, yet many providers are sadly falling behind in utilising these possibilities.

## **ePaysafe - our secure online portal**

We don't believe you should have to download or license our software, which is why we have developed our systems to be accessed securely via the web.

As the administrator, you can log onto ePaysafe at any time and view the progress and status of your payroll. You have a full, secure audit trail of each stage of the process plus a full payroll archive at your fingertips.

ePaysafe may be accessed via the internet but all data is sent in a safe encrypted environment environment which is the standard used by financial institutions for sensitive data such as credit card information.

## **Intuitive and user-friendly**

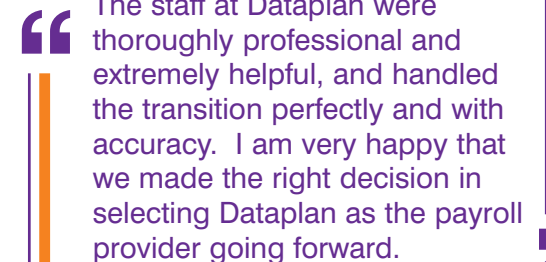
ePaysafe has been designed by Dataplan and we are constantly reviewing to ensure it is user-friendly and intuitive to use. That is one of the benefits of having our own in-house developers. With minimal training, ePaysafe becomes an integral part of the payroll function.

We are also able to work with our clients to ensure that ePaysafe integrates with their other systems and software, such as staff scheduling software, to cut down on time and potential data inaccuracies.

## **Streamlining the process**

Even if you have multiple payrolls, ePaysafe makes the submission and approval of your payrolls quick and efficient. Secure multi-level access allows people to enter data, such as hours worked, in a format that cuts down on processing time and increases accuracy.

Because the system is web-based it can be accessed from anywhere 24/7, across multi-sites or whilst working out of the office.



“ The staff at Dataplan were thoroughly professional and extremely helpful, and handled the transition perfectly and with accuracy. I am very happy that we made the right decision in selecting Dataplan as the payroll provider going forward. ”

# THE NEXT GENERATION OF EPAYSLIPS

ePayslips are becoming increasingly popular as they provide a convenient, secure and cost effective way of delivering payslip information to employees. Although ePayslips have been around for a number of years, with the increase in internet usage, bandwidth, internet enabled mobile devices and the widespread use of secure online banking, the ePayslip market is maturing. With this maturity of the market comes the increase in requests from employers who want to offer ePayslips without changing payroll systems.

## Benefits of ePayslips

The increasing demand for ePayslips from our clients has resulted in us looking at the opportunities this technology offers for the humble payslip. A paper payslip can only do one thing, give you your pay information, whereas an ePayslip, can also be a secure two-way communication tool with your employees.

Each employee who opts in to ePayslips will have their own secure login where they can access not only their payslip information but all the payslips Dataplan have produced and even other information such as P60s.

## Benefits of ePayslips

For you, as an employer, there are many benefits to ePayslips over paper payslips

- Reduced costs
- More environmentally friendly
- Speedy delivery of payslip information to employees
- Improved communication of information to employees
- Less queries and requests for payslip information
- Self-service of key employee information / documents
- Auto Enrolment communications compliance

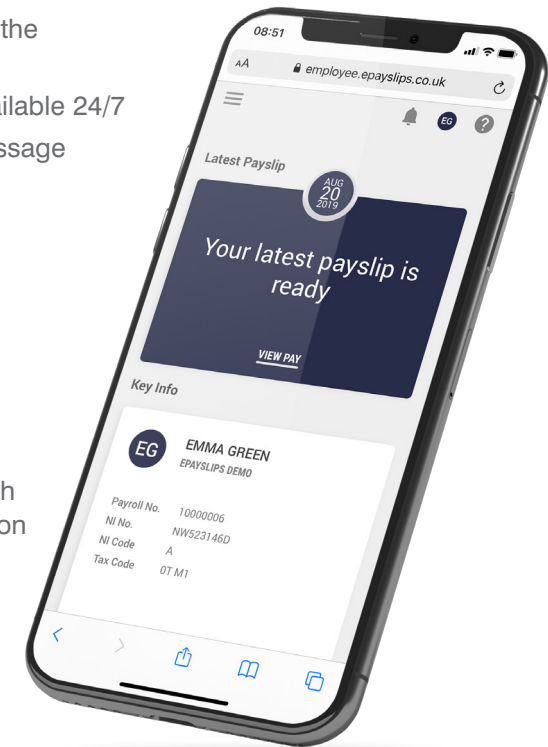
There are also considerable benefits to the employee when switching to ePayslips

- Full access to payslip information available 24/7
- Flexible notification by email, text message and push notifications
- P60s available online
- Secure sending facility to email their bank

## ePayslip innovation

Like all our systems, we are constantly evolving ePayslips such as the development of our ePayslip apps which allow easy access to ePayslip information via smartphones and tablets.

We are also looking at how ePayslips can be used as a secure employee communication tool over and above just payslip information.



**For more information about our ePayslip service you can visit our dedicated ePayslip website [www.epayslips.co.uk](http://www.epayslips.co.uk)**



# A BIT MORE ABOUT DATAPLAN

Dataplan has been in the business of providing payroll solutions since 1969.

We currently act for over 1500 businesses nationally and our customers are spread throughout the country from Edinburgh to Torquay. We handle payrolls of all sizes although our core client base is with businesses between 50 and 10,000 employees.

We are not a huge faceless bureau but a specialist managed payroll provider.

We have expertise in some of the most demanding payroll sectors such as education and with our team of payroll professionals there is no payroll situation, however complex, that we cannot handle.

Throughout our growth we have kept to our overriding principals of providing high levels of payroll expertise with an informal and personal touch. For our clients, we aren't just a payroll bureau, but are an extension of their in-house team.



“Dataplan offered more of a personal, informal and flexible way of working. With other providers you are buying their systems and have to fit your processes around them. With Dataplan, they were willing to fit their systems around ours.”

To discuss how Dataplan can help your business streamline your payroll processing

Call **03331 123456**

Or visit **[dataplanpayroll.co.uk](http://dataplanpayroll.co.uk)**

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