



The American Payroll Association - and - the American Accounts Payable Association

**AAPA**



# The 2011 Fall Forum

## *The Road to World Class Performance*

Cutting-edge technologies, innovative practices, and leadership techniques you need to help maximize resources and control costs in your daily operations.

- Learn how organizations are preparing for disasters through business continuity planning
- See the debut of the 2011 Payroll and Workforce Management Performance Study results
- Prepare for your next global initiative with the new Global Payroll Management Certificate Program
- Advance your organization by attending the Leadership Certificate Program

**Blitz Discount**  
Register three for the price of two!  
See registration page for details.

Conference Sponsors:



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**TALX**

**September 21-23, 2011**  
**Sheraton New Orleans**  
**New Orleans, LA**

Earn up to 19.5 RCHs, 1.95 CEUs, or 23 CPE credits.

For complete details and to register online, visit: [www.FallForum.org](http://www.FallForum.org)



# The 2011 Fall Forum

## *The Road to World Class Performance*

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### **Control Costs • Improve Performance • Increase Efficiency**

Learning how to increase efficiency, cut costs, and improve your organization's bottom line is more important than ever before. As a payroll or accounts payable professional, your role in your organization has become increasingly important, as you are charged with finding real-world solutions during these challenging times.

### **Why you shouldn't miss it...**

#### **The Global Payroll Management Certificate Program Debut**



This year, APA is introducing a new certificate program aimed at empowering professionals who deal with global payrolls. The **Global Payroll Management Certificate Program** addresses the challenges a global payroll faces such as standardization, consistency, and building an internal structure that supports paying employees globally. Whether your organization is currently global, or is going global for the first time, this five-session certificate program teaches you best practices for an effective strategy.

#### **Performance Study Unveiled**

The results of the 2011 Payroll and Workforce Management Performance Study will be unveiled at the Fall Forum. You'll be the first to review the results and metrics from organizations like yours on everything from cost, quality, and productivity metrics to best practices being used to achieve top performance. Compare your organization's processes to others like yours and create a roadmap for reaching top performance.

### **Who Should Attend?**

Executives, supervisors, managers, and those who aspire to move up the corporate ladder. Attendees from previous conferences have come from companies such as: Lowe's, General Dynamics, Shell Oil Company, Sephora USA Inc., Southwest Airlines, and MetLife.



#### **Leadership Certificate Program**

Take part in our exclusive Leadership Certificate Program, a dynamic series of workshops that will equip you with knowledge and skills required for leadership success in the 21st century. After taking the 10 educational sessions noted with the LCP logo, you'll receive a Leadership Certificate, a bona fide credential for advancing your career.

#### **Prism Awards**

Discover what drives the success behind the recipients of the prestigious APA and AAPA 2011 Prism Awards. Prism Award recipients are honored based on best practice achievements in technology, management, processes, and overall best practices. The 2011 Prism Awards will be presented Wednesday at the Networking Luncheon.

#### **World Class Education**

Choose from 28 workshops over three days and receive up to 19.5 RCHs, 1.95 CEUs, or 23 CPE credits.

# Agenda



## Wednesday, September 21

- 7:00 a.m. – 8:00 a.m. **Continental breakfast with exhibitors**
- 7:00 a.m. – 12:00 p.m. **Registration**
- 8:00 a.m. – 10:00 a.m. **Opening General Session**  
Welcome remarks  
Dan Maddux  
Executive Director  
American Payroll Association  
American Accounts Payable Association  
Brent Gow, CPP  
President-Elect  
American Payroll Association  
Results of the 2011 Payroll and  
Workforce Management Performance Study
- The Hackett Group**  
World-Class Defined and Enabled
- 10:00 a.m. – 10:30 a.m. **Coffee break with exhibitors**
- 10:30 a.m. – 12:00 p.m. **Workshop Session 1**
- 12:00 p.m. – 1:15 p.m. **Networking Luncheon and Prism Awards**
- 1:15 p.m. – 2:45 p.m. **Workshop Session 2**
- 2:45 p.m. – 3:15 p.m. **Refreshment break with exhibitors**
- 3:15 p.m. – 4:45 p.m. **Workshop Session 3**
- 4:45 p.m. – 6:30 p.m. **Cocktail reception with exhibitors**

## Thursday, September 22

- 7:00 a.m. – 8:00 a.m. **Continental breakfast with exhibitors**
- 8:00 a.m. – 9:30 a.m. **General Session**  
Business Continuity – Preparing Your Operations  
for the Next Disaster
- 9:30 a.m. – 10:00 a.m. **Coffee break with exhibitors**
- 10:00 a.m. – 11:30 a.m. **Workshop Session 4**
- 11:45 a.m. – 1:00 p.m. **Networking Roundtable Luncheon**
- 1:00 p.m. – 2:30 p.m. **Workshop Session 5**
- 2:30 p.m. – 3:00 p.m. **Refreshment break with Exhibitors**
- 3:00 p.m. – 4:30 p.m. **Workshop Session 6**
- 4:45 p.m. – 6:15 p.m. **Workshop Session 7**

## Friday, September 23

- 7:30 a.m. – 8:15 a.m. **Continental breakfast**
- 8:15 a.m. – 9:45 a.m. **Workshop Session 8**
- 9:45 a.m. – 10:00 a.m. **Coffee Break**
- 10:00 a.m. – 11:30 a.m. **Executive Panel Discussion**
- 11:30 a.m. – 12:15 p.m. **Networking Luncheon**
- 12:15 p.m. – 1:45 p.m. **Global and Leadership Session 9**
- 1:45 p.m. – 2:00 p.m. **Refreshment Break**
- 2:00 p.m. – 3:30 p.m. **Global and Leadership Session 10**



The Sheraton New Orleans

### **Networking Luncheon**

Participate in thought provoking discussions to find innovative practices that will impact your organization's bottom line.



## Global Payroll Management Certificate Program

The APA's Global Payroll Management Certificate Program embraces the environment that payroll operates in today – the world! Professionals who participate in this program will concentrate on the processes that successful payroll operations use when operating in a global payroll environment. This unique program focuses on the strategies and practices that will ensure your organization's success when beginning to operate in or expanding a global payroll environment.

### Global Payroll Management Certificate Program Workshops

By attending all five sessions noted with the GPMCP logo, you will receive the Global Payroll Management Certificate.



**Linda Obertin, CPP**  
Vice President  
Fidelity Investments

Linda Obertin has over 20 years of in-depth payroll experience, which has included responsibility for strategic leadership and management of payroll, benefits, and HRIS.

**Mary Brumm, CPP**  
Senior Manager, Global Payroll  
NVIDIA Corporation



Mary Brumm has over 25 years of experience in payroll and accounting. She proudly serves on the Board of Advisors for the South Bay Payroll Association and APA's Strategic Payroll Leadership Task Force's Global Issues Committee.

## Leadership Certificate Program: Building Leadership Skills for the 21<sup>st</sup> Century

The APA and AAPA's Leadership Certificate Program embraces the world that leaders work in today, with specific concentration in fostering growth in the 21st century. This unique program focuses on many qualities of effective leaders including awareness of self and others, effective communication, and relationship building.

### Leadership Certificate Program Workshops

By attending all 10 sessions noted with the LCP logo, you will receive a Leadership Certificate for this program.



**Martin Armstrong, CPP, MBA**  
Senior Director, Payroll Shared Services  
Time Warner Cable

Martin Armstrong has 10 years of experience in leadership, management, benchmarking, process improvement, change management, and best practices.

**Kelly Bailey, FPC**  
Field Training Specialist  
Kronos, Inc.



Kelly Bailey has over 15 years of training and development experience with a concentration in course development and delivery. She has led teams of instructors, course developers, and education consultants.

## Executive Panel

Join this group of distinguished panelists, who are recognized leaders in their organizations, as they share their strategic insights on how they have mastered success in today's business environment.



Moderator  
**Linda Obertin, CPP**  
Vice President  
Fidelity Investments

Linda Obertin has over 20 years of in-depth payroll experience, which has included responsibility for strategic leadership and management of payroll, benefits, and HRIS. Her work also includes developing and implementing international and expatriate payrolls and utilizing best practices in payroll system and process design.



**Elizabeth M. King**  
VP, Global HR Solutions and Services  
Starbucks Coffee Company

Elizabeth joined Starbucks in 1997 as the vice president of retail business systems in the Information Technology Department. Within Human Resources, Elizabeth is currently responsible for various functions, including the HRIS strategy and execution, payroll and pay-related functions, Partner Contact Center (employee service center) and the Partner Resources Support Center (employee relations) functions.



**Ian Mise**  
President  
LeadingEdge Payroll Group, Inc.

With more than 30 years of experience in the payroll, HR, information technology, taxation, and pension fields, Ian Mise is recognized as an international expert on payroll and HR matters. An advocate of payroll best practices, Ian spearheads LeadingEdge's HR/payroll benchmarking studies and continues to participate in government sponsored task forces and committees pertaining to HR/payroll practices and compliance.



**Steve Hershfield**  
VP, Financial Shared Services  
Time Warner Cable

Steven utilizes his 14 years of combined experience in shared services to oversee Time Warner Cable's transactional accounting, accounts payable, payroll, and benefits accounting functions. Since joining Time Warner Cable in 2002, he has successfully led the team to switch from decentralized payroll and accounts payable processes to a shared services model.



# APA & AAPA's 2011 Prism Awards

## Showcase Your Outstanding Payroll Department: Nominate Your Organization for the 2011 Prism Award

If your organization has improved business practices and overall processes over the last year, your organization could be the recipient of a 2011 APA Prism Award. Achieving such an award will help your department **garner industry-wide recognition**, and prove your organization's worth to company officials.

Now is the time to nominate your department for the prestigious 2011 Payroll Prism Awards. Companies of all sizes are welcome to nominate their departments, and any department involved in payroll, finance, HR, or accounting is eligible.

The 2011 Prism Awards will be presented to innovative payroll departments that exhibit best practices in four different categories: Technology, Management, Processes, or Overall Best Practices.

Download the nomination form today at <http://info.americanpayroll.org/pdfs/prism.pdf>

**Nominations are due Monday, July 11.**

Entries will be judged based on specific criteria in areas of improvement and responses to discussion questions. The winner will be chosen by members of the APA's Strategic Payroll Leadership Task Force (SPLTF).



The 2010 Payroll Prism Award Recipients.

## Showcase Your Outstanding AP Department: Nominate Your Organization for the 2011 Prism Award

Now is the perfect time to **show off your accounts payable department**. The **Prism Award for Best Practices** will honor one AP department nationally that has shown excellence in technology, performance, or process improvement.

If your organization has recently improved its AP technology, business practices, or processes, your organization could be in line to receive the 2011 AAPA Prism Award. Companies of all sizes are encouraged to nominate their departments.

Download the nomination form today at <http://info.americanap.org/pdfs/prism.pdf>

**Nominations are due Monday, July 11.**

Entries will be judged based on specific criteria in areas of improvement and responses to discussion questions. The winner will be chosen by members of the Strategic Accounts Payable Leadership Task Force (SAPLTF).

# The 2011 Fall Forum\*



## General Sessions

### Opening General Session — Performance Study Unveiled

**10101 Wednesday, 8:00 a.m. – 10:00 a.m.**

Field of Study: Statistics/1.5 CPE credits

Felicia Cheek Director, Global Time-to-Pay Program The Hackett Group	Brian Koniuk Managing Director The Hackett Group
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The results of the 2011 Payroll and Workforce Management Performance Study will be unveiled at the Fall Forum. You'll be the first to hear the global and regional results from organizations like yours on everything from cost, quality, and productivity metrics to best practices being used to achieve top performance. Find out what practices and processes top performing payroll organizations are using to improve their performance and become top performers both regionally and globally.

### Business Continuity – Preparing Your Operations for the Next Disaster

**20101 Thursday, 8:00 a.m. – 9:30 a.m.**

Field of Study: Business Management & Organization/  
1.5 CPE credits

Jeremy Turner VP, Chief Technical Officer The Shaw Group, Inc.	Jerry Monier, Jr., LEM Section Chief, Planning Louisiana Governor's Office of Homeland Security
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Winston Barton  
External Affairs Specialist - Private Sector  
Department of Homeland Security - FEMA

Ensuring your operations continue despite natural or man-made disasters is a critical component of your organization's success. In this session, you will hear how a successful organization continued to operate during one of the most extensive disasters in recent U.S. history. We'll also find out how federal and state government agencies can assist your planning for continued operation both during and after a disaster.

### Executive Panel Discussion

**30201 Friday, 10:00 a.m. – 11:30 a.m.**

Field of Study: Management Advisory Services/1.5 CPE credits

Linda Obertin, CPP Vice President Fidelity Investments	Elizabeth M. King VP, Global HR Solutions and Services Starbucks Coffee Company
Ian Mise President LeadingEdge Payroll Group, Inc.	Steve Hershfield VP, Financial Shared Services Time Warner Cable

A group of distinguished panelists who are recognized leaders in their organizations share their strategic insights on how they have mastered success in today's business environment. These leaders will discuss their expectations for their organizations' success focusing on leadership, global operations, and continuing to operate after a disaster.

## Forum Workshops

### Dispelling the Myths of Global Payroll Shared Services

**10201 Wednesday, 10:30 a.m. – 12:00 p.m., Session 1**

Field of Study: Business Management & Organization/  
1.5 CPE credits

Anne Clifford  
Senior Advisor  
KPMG LLP

Global payroll shared services; what does that really mean? This workshop will form a basis for understanding your global payroll needs, service delivery options, and where shared services can help you achieve success.

### Expatriate Payroll

**10202 Wednesday, 10:30 a.m. – 12:00 p.m., Session 1**

Field of Study: Taxes/1.5 CPE credits

Patrick Landers, CPP  
Managing Director  
KPMG LLP

This workshop examines the payroll reporting requirements that are unique to expatriates. Join us to enhance your knowledge of reporting and withholding requirements, taxability of various assignment allowances, the mechanism of hypothetical tax, and the pros and cons of various tax reimbursement methods.

### What Kind of Leader Are You? Core Leadership Competencies



**10203 Wednesday, 10:30 a.m. – 12:00 p.m., Session 1**

Field of Study: Personal Development/1.5 CPE credits

Martin Armstrong, CPP Sr. Director, Payroll Shared Services Time Warner Cable	Kelly Bailey, FPC Field Training Specialist Kronos, Inc.
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An overview of leadership including historic leaders, styles of leadership, and characteristics/traits/competencies of leaders. Discover the answers to key questions that leaders ask. Learn to see leadership in yourself and others and to develop your authentic leadership style.

## The Discovery Phase



**10204 Wednesday, 10:30 a.m. – 12:00 p.m., Session 1**  
**Double Session, continues in Session 2**

Field of Study: Business Management & Organization and Communications/3 CPE credits

Linda Obertin, CPP  
Vice President  
Fidelity Investments

Mary Brumm, CPP  
Senior Manager, Global Payroll  
NVIDIA Corporation

Begin your global payroll adventure by analyzing why the move is being made, the effect it will have on current company culture and processes in payroll, HR, and finance, and who will own the global payroll process. Get tips on building a business case and discover the questions you'll need to ask regarding cultural differences, language requirements, and employment laws and regulations.

## Making the Payroll Process Leaner

**10401 Wednesday, 1:15 p.m. – 2:45 p.m., Session 2**

Field of Study: Management Advisory Services/1.5 CPE credits

Dennis Danilewicz, CPP  
Sr. Director, Payroll Services  
NYU Langone Medical Center

These days, it seems that everyone is faced with reduced budgets and staffing. We are told to work smarter; not harder. Easy to say, but how does one even start? This workshop will look at ways to take non-value-added work out of the process and reduce manual intervention. Hear the case study of a former Prism Award winner and how his department took the steps to be leaner (but not meaner).

## Results of the 2011 Workforce Management Performance Study

**10402 Wednesday, 1:15 p.m. – 2:45 p.m., Session 2**

Field of Study: Management Advisory Services/1.5 CPE credits

Brian Koniuk  
Managing Director  
The Hackett Group

A top performing payroll organization must be compliant. Join us to gain insight on how top performing payroll organizations are ensuring compliance on a local, regional, and global level. Find out the benefits of an integrated Workforce Management system to both corporate operations and the payroll organization. You will leave this session with ideas on how to strategically focus on Workforce Management and your company.

## Seeing Things Differently; Building a Vision

**10403 Wednesday, 1:15 p.m. – 2:45 p.m., Session 2**

Field of Study: Personal Development/1.5 CPE credits

Martin Armstrong, CPP  
Sr. Director, Payroll  
Shared Services  
Time Warner Cable

Kelly Bailey, FPC  
Field Training Specialist  
Kronos, Inc.

Explore the big picture of leadership by building a vision, being innovative, and understanding an organization's culture. Discover the importance of a long-range view, using creativity, and having external awareness.

## Global Payroll – Separating Fact From Fiction

**10501 Wednesday, 3:15 p.m. – 4:45 p.m., Session 3**

Field of Study: Management Advisory Services/1.5 CPE credits

Catherine Veinbachs  
Practice Partner,  
Wipro Consulting Solutions  
Wipro Technologies

Susan Wines  
Global Compensation  
and Payroll Services  
SIRVA Relocation

The notion of "global payroll" has been around for quite awhile, but what does the term mean, and is it really important? This session will explore some ideas and assumptions behind the phrase to separate fact from fiction. We'll go "underneath the covers" to discuss the various models for global payroll, as well as the implications for your organization at a strategic and operational level.

## It's the People; Developing Leadership Relationships



**10502 Wednesday, 3:15 p.m. – 4:45 p.m., Session 3**

Field of Study: Personal Development/1.5 CPE credits

Martin Armstrong, CPP  
Sr. Director, Payroll  
Shared Services  
Time Warner Cable

Kelly Bailey, FPC  
Field Training Specialist  
Kronos, Inc.

Realize the importance of self-awareness and awareness of others, how the follower impacts the ability to lead, and setting expectations. Get tips on coaching, gaining buy-in, inspiring, and mentoring.

## Results of the 2011 Payroll Performance Study

**10503 Wednesday, 3:15 p.m. – 4:45 p.m., Session 3**

Field of Study: Management Advisory Services/1.5 CPE credits

Felicia Cheek  
Director, Global Time-to-Pay Program  
The Hackett Group

As more payroll leaders are being asked to take on global responsibilities, our performance study has been expanded to include regional peer groups. Join us as we share payroll costs and best practices for multinational companies operating in the Americas, EMEA, and APAC Regions. Find out common metrics for cost, quality, productivity, and timeliness.

## The Strategy Phase



**10504 Wednesday, 3:15 p.m. – 4:45 p.m., Session 3**

**Double Session, continues in Session 4**

Field of Study: Management Advisory Services/3 CPE credits

Linda Obertin, CPP  
Vice President  
Fidelity Investments

Mary Brumm, CPP  
Senior Manager, Global Payroll  
NVIDIA Corporation

Define your organization's goals and objectives, corporate governance of the project, and strategic vision for carrying it out. We'll discuss a project charter that outlines the global project's scope, budget, roles and responsibilities; success measurements; risks and barriers to success; options for deploying your global payroll processes; and what types of change you will have to manage.

\*Faculty and program subject to change without notice..

## Can Your Business Continuity Plan Meet Today's Requirements?

**20201 Thursday, 10:00 a.m. – 11:30 a.m., Session 4**

Field of Study: Business Management & Organization/  
1.5 CPE credits

Glenn Heil, CPP  
Sr. Payroll Manager  
The Shaw Group, Inc.

Brent Gow, CPP  
Director, Global Payroll  
Consulting & Compliance  
Starbucks Coffee Company

Deborah Ellis Timberlake, Esq., CPP  
Principal  
Timberlake and Associates

A business continuance plan is a must for every organization. This workshop explores the importance and necessity of a business continuance plan and why it should be elevated to the top of your "to do" list. The focus is on disaster recovery planning to deal with the minor and major disruptions in today's business environment.

## Metrics and Dashboards

**20202 Thursday, 10:00 a.m. – 11:30 a.m., Session 4**

Field of Study: Statistics/1.5 CPE credits

Linda Obertin, CPP  
Vice President  
Fidelity Investments

Dennis Danilewicz, CPP  
Sr. Director, Payroll Services  
NYU Langone Medical Center

As a payroll leader, how do you measure the performance of your team and identify areas for improvement or individual development? This workshop will review important payroll metrics and how to develop a payroll scorecard for your organization, an important tool that will raise your credibility with senior management and help you communicate the value that your payroll department adds to the bottom line.

## Stop, Look, Listen; Influential Communication

**20203 Thursday, 10:00 a.m. – 11:30 a.m., Session 4**

Field of Study: Personal Development/1.5 CPE credits

Martin Armstrong, CPP  
Sr. Director, Payroll  
Shared Services  
Time Warner Cable

Kelly Bailey, FPC  
Field Training Specialist  
Kronos, Inc.

Do you know what continual and focused listening consists of? What is the importance of speaking and writing clearly and presenting yourself effectively? This workshop covers these topics as well as how to present both positive and negative ideas, look for feedback in all places, and negotiate or get to "yes."

## Cloud Computing

**20401 Thursday, 1:00 p.m. – 2:30 p.m., Session 5**

Field of Study: Computer Science/1.5 CPE credits

Roger Smith, CPP  
Payroll Management Consultant  
PayrollProf.com

You've probably heard a lot about it, but just what the heck is meant by the term "Cloud Computing"? Is it a new concept? This workshop will address the advantages and disadvantages of this exciting "new" technology as well as how it differs from SaaS.

## Measuring the Performance of Shared Services

**20402 Thursday, 1:00 p.m. – 2:30 p.m., Session 5**

Field of Study: Statistics/1.5 CPE credits

Bill Parker  
Shared Services Director  
AECOM

It is more important than ever to create value from your Shared Services. Measuring performance of your Shared Services Center is vital to ensure alignment with the corporate strategy and industry benchmarks. This workshop shows you how to tell your organization's story using key metrics and how to use a balanced scorecard to align with corporate strategies.

## Nothing's the Same; Motivating Teams Through Change

**20403 Thursday, 1:00 p.m. – 2:30 p.m., Session 5**

Field of Study: Personal Development/1.5 CPE credits

Martin Armstrong, CPP  
Sr. Director, Payroll  
Shared Services  
Time Warner Cable

Kelly Bailey, FPC  
Field Training Specialist  
Kronos, Inc.

Get tips on employee engagement and motivation. Learn how to build a team, influence performance, develop individuals, and encourage flexibility.

## The Design Phase

**20404 Thursday, 1:00 p.m. – 2:30 p.m., Session 5**

**Double Session, continues in Session 6**

Field of Study: Management Advisory Services/3 CPE credits

Linda Obertin, CPP  
Vice President  
Fidelity Investments

Mary Brumm, CPP  
Senior Manager, Global Payroll  
NVIDIA Corporation

Determine what information you need to set up leave and pay matrices, define "total compensation," and compile statutory and company compliance requirements, and how to pull it all together in a blueprint. Learn how to build a structure for your project; finalize implementation plans; measure success; develop a service delivery model; and plan for continuing operations during and after a disaster.

## "Strategic Sourcing" of Payroll

**20501 Thursday, 3:00 p.m. – 4:30 p.m., Session 6**

Field of Study: Business Management & Organization/  
1.5 CPE credits

Catherin Veinbachs  
Practice Partner, Wipro Consulting Solutions  
Wipro Technologies

There are more options than ever surrounding payroll processing: insourcing, cosourcing, outsourcing, hosted, SaaS, inhouse, global, and more. But so many options also create challenges. This session helps you decide what's right for your company and whether or not it's possible to create an integrated strategy.

\*Faculty and program subject to change without notice..

## Best Practices and Shared Services

### **20502 Thursday, 3:00 p.m. – 4:30 p.m., Session 6**

Field of Study: Management Advisory Services/1.5 CPE credits

Bill Parker  
Shared Services Director  
AECOM

This session discusses the key elements and structures of shared services to allow you to implement best practices and a continuous improvement strategy. Listen to key topics such as governance and stakeholder management; developing and maintaining effective service level agreements; outsourcing/offshoring options; and how to use scorecards to measure performance.

### **Yes? No? Maybe? Being a Decision Maker**



### **20503 Thursday, 3:00 p.m. – 4:30 p.m., Session 6**

Field of Study: Personal Development/1.5 CPE credits

Martin Armstrong, CPP Sr. Director, Payroll Shared Services Time Warner Cable	Kelly Bailey, FPC Field Training Specialist Kronos, Inc.
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Learn how to delegate for team growth and how to make tough business decisions. Learn how to build your own decision making matrix using the data you have.

### **Forecasting the Unemployment Cost For the Coming Year**

### **20601 Thursday, 4:45 p.m. – 6:15 p.m., Session 7**

Field of Study: Taxes/1.5 CPE credits

Michael Mohr  
Vice President  
TALX Corporation

Develop a broad overview of the national economy related specifically to unemployment taxes with this informative workshop, which reviews basic unemployment tax strategies to help minimize and forecast future tax rates. State trust fund solvency and current federal and state legislative trends are among the topics this workshop presents in order to provide proactive unemployment tax cost guidance to employers in 2011 and beyond.

### **From Plan to Project; The Results Driven Leader**



### **20602 Thursday, 4:45 p.m. – 6:15 p.m., Session 7**

Field of Study: Personal Development/1.5 CPE credits

Martin Armstrong, CPP Sr. Director, Payroll Shared Services Time Warner Cable	Kelly Bailey Field Training Specialist Kronos, Inc.
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Uncover the skills behind effective project and time management. Learn to run effective meetings, process and prioritize projects, and measure results.

## Shared Services Governance

### **20603 Thursday, 4:45 p.m. – 6:15 p.m., Session 7**

Field of Study: Business Management & Organization/  
1.5 CPE credits

Anne Clifford  
Senior Advisor  
KPMG LLP

Today's business environment requires you to have good governance within your service delivery organization(s). This workshop will share the components of a governance structure and how they apply to shared services.



### **The Implementation Phase**

### **20604 Thursday, 4:45 p.m. – 6:15 p.m., Session 7**

#### **Double Session, continues in Session 8**

Field of Study: Communications and Statistics/3 CPE credits

Linda Obertin, CPP Vice President Fidelity Investments	Mary Brumm, CPP Senior Manager, Global Payroll NVIDIA Corporation
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See the most effective ways to kick off your project, develop a change management plan, communicate the changes, and implement a training plan. Learn how to keep "scope creep" from attacking your project, conduct tests with end users, track the progress of the implementation, and evaluate its successes and challenges.

### **Cultural Integrity and Its Impact on Technology**

### **30101 Friday, 8:15 a.m. – 9:45 a.m., Session 8**

Field of Study: Communications/1.5 CPE credits

Lisa Disselkamp President Athena Enterprises	Roger Smith, CPP Payroll Management Consultant PayrollProf.com
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Ever wonder why – despite investing in a new, feature-rich system and enjoying a smooth, well-executed implementation – things don't seem to get any better? Is your culture out of sync with the system's new role? Studies show that cultural workplace integrity creates "workability" for systems. Explore where culture manifests into obstacles for technology success and step-by-step ways to fix it with this informative workshop.

### **Performance Reviews**

### **30102 Friday, 8:15 a.m. – 9:45 a.m., Session 8**

Field of Study: Communications/1.5 CPE credits

Vickie Majors, CPP  
Consulting Director  
Victorious Enterprises

Consistency, objectivity, and honesty are just three components of a successful performance review program. In this session, learn how to apply those components as you prepare for, and present, a performance review that will foster improved employee performance. There will be opportunities to share your successful and unsuccessful experiences with performance reviews as you learn how to make them better.

\*Faculty and program subject to change without notice..

**Tears of Sorrow or Joy;  
Understanding Emotional Intelligence**  
**30103 Friday, 8:15 a.m. – 9:45 a.m., Session 8**



Field of Study: Personal Development/1.5 CPE credits

Martin Armstrong, CPP  
Sr. Director, Payroll  
Shared Services  
Time Warner Cable

Kelly Bailey, FPC  
Field Training Specialist  
Kronos, Inc.

See team members from an emotional perspective and understand how to resolve (and avoid) conflicts. Understand the total person – not just the nine-to-five employee that you are leading.

**Staying Sharp;  
Embracing Intellectual Curiosity**  
**30401 Friday, 12:15 p.m. – 1:45 p.m., Session 9**



Field of Study: Personal Development/1.5 CPE credits

Martin Armstrong, CPP  
Sr. Director, Payroll  
Shared Services  
Time Warner Cable

Kelly Bailey, FPC  
Field Training Specialist  
Kronos, Inc.

Build your intellectual curiosity IQ and be a forever learner. Learn how to recover from mistakes, or make mistakes work for you.

**Continuous Operations**  
**30402 Friday, 12:15 p.m. – 1:45 p.m., Session 9**  
**Double Session, continues in Session 10**



Field of Study: Statistics and Communications/3 CPE credits

Linda Obertin, CPP  
Vice President  
Fidelity Investments

Mary Brumm, CPP  
Senior Manager, Global Payroll  
NVIDIA Corporation

How can you establish baselines, benchmarks, and metrics to monitor your global payroll project going forward? What types of meetings and other communications may be necessary? We will cover these issues as well as how to measure internal customer satisfaction and develop vendor scorecards.

**Values, Ethics, Passion;  
The Authentic Leader**  
**30501 Friday, 2:00 p.m. – 3:30 p.m., Session 10**



Field of Study: Personal Development/1.5 CPE credits

Martin Armstrong, CPP  
Sr. Director, Payroll  
Shared Services  
Time Warner Cable

Kelly Bailey, FPC  
Field Training Specialist  
Kronos, Inc.

Know your personal leadership style and understand your personal values, ethics, and integrity. Identify your drive and purpose while honing your ethics, strengths, passions, and purpose.

## American Payroll Association Partnership with Dress for Success



American Payroll Association is happy to launch a community service project in New Orleans coordinated by Projects With Purpose! In conjunction with this year's meeting, APA will be partnering with the New Orleans Chapter of Dress for Success!

Dress for Success New Orleans is a not-for-profit organization that promotes the economic independence of disadvantaged

men and women by providing professional attire, a network of support, and the career development tools to help them thrive in work and in life.

In a small, but extremely important way, the American Payroll Association will help prepare job seekers for their very important first impression job interviews by providing business suits to those in need.

Help us reach our goal of 125 suits by bringing a gently worn men's or women's suit with you to the APA registration desk, and Dress for Success volunteers will be on site to collect your donations.

## Fall Forum Information

You will receive an e-mail confirmation of your registration after your completed form and payment have been received and processed.

**Registration Fees:** Fees include continental breakfast, coffee and refreshment breaks, lunch, and networking cocktail reception on Wednesday, September 21; continental breakfast, coffee and refreshment breaks, and lunch on Thursday, September 22 and Friday, September 23.

**Dress Code:** Business casual is the recommended attire for all events.

**Hotel Accommodations:** Room reservations and hotel arrangements are the responsibility of the individual. APA and AAPA have reserved a room block at the Sheraton New Orleans at the rate of \$149.00 per night Tuesday, September 20 through Friday, September 23. (Reservation extensions based on availability at prevailing rate.) Rates are for single/double occupancy. These rates are available until August 30, 2011. When making your reservations, please ask for the American Payroll Association's group rate and use the code 1CE84U. After August 30, 2011, reservations will be accepted on a space available basis at the hotel's prevailing rate. All reservations must be guaranteed with payment for the first night. Cancellations without penalty must be made three days prior to arrival. Check-in time is 3:00 p.m.; check-out time is 11:00 a.m. Hotel information: The Sheraton New Orleans • 500 Canal Street • New Orleans, LA 70130. Reservations: (888) 627-7033.

**Substitutions: A \$45 administrative fee will be assessed for each substitution.** Please notify APA or AAPA by letter or by fax at (210) 224-6038 if a participant substitution is needed with the following information: conference name; original registrant's name; new (substitution) registrant's name;

title; company name; full street address; and phone number. Substitution registrants become ineligible for refunds. If you cannot attend the conference, you must notify APA/AAPA of your cancellation prior to the dates of the conference. See cancellation policy.

**Cancellations:** Written requests received 7 business days prior — full refund; 4-6 business days prior — refund less \$50 service charge; fewer than 4 business days prior — APA or AAPA credit will be issued less \$100 and will be valid for one year from the date of issue. Cancellations the day of the program or after the program dates are nonrefundable and noncredited. A check will be mailed to you for refunds; no refunds will be made directly to your credit card account.



**Continuing Professional Education Credit:** The APA is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors, #103152. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Website: www.nasba.org. No prerequisites or advance preparation required. Delivery Method: Group-Live. Course Level: Overview

Note: Statements issued by speakers at APA and AAPA conferences are the responsibility of the speakers and do not necessarily represent the opinion, position, or endorsement of the American Payroll Association and American Accounts Payable Association, their officers, members, or staff.



Recertification Credit Hours (RCH) are awarded by the APA for pre-approved payroll learning events.

# APA and AAPA's 2011 Fall Forum Registration Form

Register online: [www.FallForum.org](http://www.FallForum.org)

## Blitz Discount!

Send a team of two to the 2011 Fall Forum at the regular registration fee and receive the third registration FREE!

**Current APA members**, you and two of your colleagues can attend for only \$2,198 (member's conference fee @ \$1,099 x 2).

**If you join APA**, you and two of your colleagues can attend for only \$2,452 (APA membership fee @ \$254 + member's conference fee @ \$1,099 x 2).

**Colleagues**, you and two of your colleagues can attend for only \$2,350 (colleague's conference fee @ \$1,175 x 2).

**Nonmembers**, you and two of your colleagues can attend for only \$2,658 (nonmember's conference fee @ \$1,329 x 2).

Mail or fax all three blitz registrations at the same time with total payment by one check or credit card. Cancellation and substitution fees still apply.

Names of Blitz Group members: 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

**1**  I am an APA or AAPA Member ..... \$1,099

Member's ID#: \_\_\_\_\_

(Update your contact information at [www.americanpayroll.org](http://www.americanpayroll.org) or [www.americanAP.org](http://www.americanAP.org))

I am a COLLEAGUE of an APA or AAPA member  
(at the same street address) ..... \$1,175

Colleague's ID#: \_\_\_\_\_

Member's Name: \_\_\_\_\_

Member's ID#: \_\_\_\_\_

I want to join APA or AAPA and register at the member rate

	APA	AAPA
Class registration fee (member rate)	\$ 1,099	\$ 1,099
One-year annual membership dues*	\$ 219	\$ 185
One-time enrollment fee	\$ 35	\$ 35
<b>TOTAL</b>	<b>\$1,353</b>	<b>\$1,319</b>

I am NOT an APA or AAPA member or colleague ..... \$1,329

Special Dietary Request:  Vegetarian  Gluten-free  Kosher

## 2 Registrant's Address

Ms.  Mr. ID #: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_

Last Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Province: \_\_\_\_\_ Country: \_\_\_\_\_

Zip + 4-digit/Postal Code: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
(Area/Country Code) (Area/Country Code)

E-mail: \_\_\_\_\_

(For official APA and AAPA communications, registration confirmations, *Payroll Currently*, AP Journal, and PAYTECHonline)

### Needed for new member enrollment:

Birth date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Please indicate if you are:  CPA  PA (For NASBA reporting purposes)

If you have special dietary needs or have a disability and require special services, please contact us at least 14 days in advance of the event to discuss your needs. Call (210) 224-6406, M-F, 8 a.m. - 6 p.m. CT.

## 3 Payment Information

Payment in U.S. dollars must accompany registration form.  
Currency Converter: [www.americanpayroll.org](http://www.americanpayroll.org), [www.americanAP.org](http://www.americanAP.org)

Three enrollment options:

Online  Fax  Mail  
[www.FallForum.org](http://www.FallForum.org) (210) 224-6038 To address below

I authorize the API Fund for Payroll Education, Inc. to CHARGE my:



Card #: \_\_\_\_\_

Exp. Date: \_\_\_\_\_ Card is: (check one)  Corporate  Personal

Name on credit card: \_\_\_\_\_

Signature of cardholder: \_\_\_\_\_

Purchase Order #: \_\_\_\_\_  
(government agencies/universities only)

Make CHECK payable and mail to:

API Fund for Payroll Education, Inc. • c/o American Payroll Association  
660 North Main Avenue, Suite 100 • San Antonio, TX 78205-1217

Phone: (210) 224-6406 • Fax: (210) 224-6038

E-mail: [apa@americanpayroll.org](mailto:apa@americanpayroll.org) or [aPa@americanAP.org](mailto:aPa@americanAP.org)

Visit: [www.americanpayroll.org](http://www.americanpayroll.org) or [www.americanAP.org](http://www.americanAP.org)

## 4 All Attendees Please Complete This Section

In case of emergency, contact:

Name: \_\_\_\_\_

Relationship to attendee: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

*\*Membership dues are subject to change without notice and are nonrefundable. Membership is on an individual basis; corporate memberships are not available. 100% of membership dues are deductible as an ordinary business expense.*

*Members of the American Payroll Association receive PAYTECH magazine as part of their annual dues of \$219, \$50 of which is allocated for their subscription to PAYTECH, which is nonrefundable therefrom.*

*Members of the American Accounts Payable Association will receive AP Journal Online and PAYTECH as part of their annual dues of \$185, \$50 of which is allocated for their subscription to PAYTECH, which is nonrefundable therefrom.*

Last updated June 2011

EMT: 9 V

### For Office Use Only:

Date: \_\_\_\_\_ Order #: \_\_\_\_\_ Batch #: \_\_\_\_\_ Group #: \_\_\_\_\_ Check #: \_\_\_\_\_ C/P: \_\_\_\_\_ Total: \$ \_\_\_\_\_ Event Code: 11403

# The 2011 Fall Forum



## Special Events *(Please check all events you plan to attend)*

- 10101 Opening General Session
- 10301 Wednesday Luncheon and Prism Awards
- 10601 Wednesday Cocktail Reception
- 20101 Thursday General Session
- 20301 Thursday Roundtable Luncheon
- 30201 Executive Panel Discussion
- 30301 Friday Luncheon

Select **ONE** workshop from each session or a Certificate Program.

Please register me for the following certificate program:

*(If you select one of these options, you may not select any other workshops.)*

- Global Payroll Management Certificate Program 
- Leadership Certificate Program 

## Wednesday, September 21

**Session 1: 10:30 a.m. – 12:00 p.m.**

- 10201 Dispelling the Myths of Global Payroll Shared Services
- 10202 Expatriate Payroll
- 10203 What Kind of Leader Are You? Core Leadership Competencies
- 10204 The Discovery Phase\*

**Session 2: 1:15 p.m. – 2:45 p.m.**

- 10401 Making the Payroll Process Leaner
- 10402 Results of the 2011 Workforce Management Performance Study
- 10403 Seeing Things Differently; Building a Vision

**Session 3: 3:15 p.m. – 4:45 p.m.**

- 10501 Global Payroll – Separating Fact From Fiction
- 10502 It's the People; Developing Leadership Relationships
- 10503 Results of the 2011 Payroll Performance Study
- 10504 The Strategy Phase\*

## Thursday, September 22

**Session 4: 10:00 a.m. – 11:30 a.m.**

- 20201 Can Your Business Continuity Plan Meet Today's Requirements?
- 20202 Metrics and Dashboards
- 20203 Stop, Look, Listen: Influential Communication

**Session 5: 1:00 p.m. – 2:30 p.m.**

- 20401 Cloud Computing
- 20402 Measuring the Performance of Shared Services
- 20403 Nothing's the Same; Motivating Teams Through Change
- 20404 The Design Phase\*

**Session 6: 3:00 p.m. – 4:30 p.m.**

- 20501 "Strategic Sourcing" of Payroll
- 20502 Best Practices and Shared Services
- 20503 Yes? No? Maybe? Being a Decision Maker

**Session 7: 4:45 p.m. – 6:15 p.m.**

- 20601 Forecasting the Unemployment Cost for the Coming Year
- 20602 From Plan to Project; The Results Driven Leader
- 20603 Shared Services Governance
- 20604 The Implementation Phase\*

## Friday, September 23

**Session 8: 8:15 a.m. – 9:45 a.m.**

- 30101 Cultural Integrity and Its Impact on Technology
- 30102 Performance Reviews
- 30103 Tears of Sorrow or Joy; Understanding Emotional Intelligence

**Session 9: 12:15 p.m. – 1:45 p.m.**

- 30401 Staying Sharp; Embracing Intellectual Curiosity
- 30402 Continuous Operations\*

**Session 10: 2:00 p.m. – 3:30 p.m.**

- 30501 Values, Ethics, Passion: The Authentic Leader

\*Double session; do not register for a workshop in the next session

## Conference Exhibitors\*



Serving companies of every size around the world, ADP is an industry leader for employer-related business solutions: payroll, HR, benefits administration, time & labor management, pre-employment, tax & compliance services, retirement plan services, PEO & HR BPO. [www.ADP.com](http://www.ADP.com) †



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† Program sponsor

\*As of press time. Visit [www.FallForum.org](http://www.FallForum.org) for the most current list.