# 55.01.001 Hire to retire scenario board discovery workshop

The Hire to retire scenario board discovery workshop is designed to help establish a comprehensive understanding of the end-to-end human resources management process from hiring to retirement for all key stakeholders in the implementation of Dynamics 365 to support these processes. This workshop will guide participants through the key scenarios and business process areas involved in the Hire to retire process. By leveraging visual representations and interactive discussions, the workshop aims to align all stakeholders on the vision for the project and ensure that the new technology solution meets the needs of its users. Participants will engage in identifying key scenarios, goals, and key inputs and outputs for the processes. The workshop serves as a valuable tool for communication and collaboration, helping to refine the proposed scope and allows the partner to create an initial design proposal.

## Assumptions

* The Hire to retire end-to-end business process is in scope for the Dynamics 365 project.
* The Hire to retire scenario board is available and leveraged to conduct the workshop.
* The key stakeholders are available and actively contribute to the workshop. The following stakeholders are recommended:
  + HR managers - responsible for managing the lifecycle of employees from hiring to retirement
  + IT department - responsible for implementing and maintaining technology solutions to support the Hire to retire process
  + Finance department - responsible for tracking employee costs and benefits
  + Operations department - responsible for aligning workforce with business operations
  + Legal and compliance department - responsible for ensuring regulatory compliance related to HR management
  + Executive leadership - responsible for overseeing HR strategies and ensuring alignment with strategic goals
  + Human resources department – responsible for hiring, training, and managing employees

## Objectives

* Understand the customer's process: Gain a clear understanding of the customer's intended Hire to retire process and process scope, including key steps, pain points, and challenges.
* Identify key scenarios and requirements: Identify the most critical scenarios and requirements for the customer's Hire to retire process.
* Document agreed business scope: The partner understands the customer’s scenarios and requirements well enough to propose a design to support the customer’s scenario.

## High-level agenda

* Introduction and objectives
* Overview of Hire to retire process
* Detailed discussion on key scenarios
* Interactive Q&A session
* Wrap-up and next steps

## Key questions

* Introduction and objectives
  + What are your main objectives for implementing Dynamics 365 for the Hire to retire process?
  + What are the key challenges you are currently facing in this process?
  + Are there key differences between legal entities, business units, or departments that need to be considered?
* Overview of Hire to retire process
  + What are the key scenarios in your Hire to retire process? (Mark or highlight the primary scenario that will be focused on for the next phase.)
  + Are there any scenarios that should not be included on this diagram? (Mark or strikethrough scenarios that are out of scope.)
  + Are there any additional scenarios that are not included in this diagram that should be included? (Add the rows and document as potential gaps.)
  + What key differences do you see in your current process and this standard process? (Use the scenario board as a starting point. Document any key differences for change management.)
  + What are the key pain points or bottlenecks in your current process?
* Detailed discussion on key scenarios
  + What is your current organizational structure? (How many legal entities, business units, departments, etc.?)
  + Are there any plans for significant organizational structure changes or growth?
  + Are there any policies that need to be reviewed or adjusted as part of this project? (If so, document and flag for change management.)
  + What are the most critical scenarios you encounter in your Hire to retire process?
  + How many total employees do you manage today?
  + How often do you update your HR plans?
  + What systems or tools are you currently using for HR management?
  + How do you ensure compliance with regulatory requirements in your process?
  + What improvements or changes would you like to see in your current process?
* Data migration
  + What data needs to be migrated to the new HR management system?
  + How do you currently manage and store HR data?
  + Are there any data quality issues that need to be addressed before migration?
  + What are the key challenges you anticipate during the data migration process?
  + How do you plan to validate and verify the accuracy of migrated data?
* Integrations
  + What systems need to be integrated with the new HR management system?
  + How frequently is this data exchanged between your systems?
  + What is the largest volume of data exchanged in your current process?
  + How do you currently handle data exchange between different systems?
  + Are there any specific integration requirements or protocols that need to be followed?
  + What are the key challenges you face with system integration today?
  + What are the key challenges you anticipate during the integration process?
  + How do you plan to test and validate the integrations to ensure seamless data flow?

## Scenario board

Following is a sample scenario board template for the Design to retire process.



The image is a flowchart titled Hire to Retire Scenario Board that outlines a business process from hiring to retirement. The top row depicts a basic flowchart of the business process areas for the Hire to retire process. Below each process step there are one or more blue boxes that depict scenarios and key attributes of the business process area for discussion in the workshop. The bottom of the graphic includes horizontal or supporting processes that support the entire Hire to retire process.

1. **55.05 Develop People Strategy**
   * Scenarios
     + Workforce planning
     + Talent management
     + Succession planning
     + Diversity and inclusion initiatives
   * Compliance
     + Labor laws
     + Equal Employment Opportunity (EEO)
     + GDPR
   * Policies
     + Recruitment policies
     + Onboarding procedures
     + Diversity and inclusion
     + Background checks
2. **55.10 Recruit and Onboard Talent**
   * Sourcing Scenarios
     + Job postings
     + Recruitment agencies
     + Employee referrals
     + Campus recruitment
   * Candidate Type Scenarios
     + Full-time
     + Part-time
     + Interns
     + Contractors
   * Scenarios
     + Planned/Budgeted positions
     + Unplanned/Not budgeted positions
     + Manager requests
   * Budget Approach
     + Top-down
     + Bottom-up
     + Zero-based
   * Budget Detail
     + Lump sum
     + Summarize by department
     + Detailed by position
3. **55.30 Manage Workplace Compliance**
   * Compliance Scenarios
     + Health and safety regulations
     + Labor laws
     + Anti-discrimination policies
     + Data protection regulations
   * Policies
     + Code of conduct
     + Disciplinary procedures
     + Whistleblower policies
     + Workplace safety
4. **55.40 Manage Performance and Growth**
   * Performance Scenarios
     + Regular performance reviews
     + 360-degree feedback
     + Goal setting and tracking
     + Performance improvement plans
   * Development
     + Training programs
     + Career development plans
     + Succession planning
   * Recognition
     + Employee awards
     + Incentive programs
     + Promotions
5. **55.50 Manage Time and Attendance**
   * Time Tracking Scenarios
     + Time clocks
     + Time sheets
     + Shop floor time tracking (MES)
   * Attendance Scenarios
     + Attendance policies
     + Leave management
     + Shift scheduling
   * Policies
     + Overtime rules
     + Paid time off (PTO)
     + Sick leave
     + Flexible working hours
   * Travel Policies
     + Travel request/approval process
     + Travel booking
     + Expense policies
     + Expense reporting
6. **55.70 Manage Compensation and Benefits**
   * Compensation Scenarios
     + Salary structures
     + Bonus schemes
     + Equity plans
     + Pay for performance
   * Benefits Scenarios
     + Health insurance
     + Retirement plans
     + Wellness programs
     + Employee assistance programs
   * Policies
     + Compensation policies
     + Benefits enrollment
     + Payroll procedures
     + Compliance with tax regulations
7. **55.80 Offboard Talent**
   * Scenarios
     + Voluntary retirement
     + Involuntary termination
     + Resignation
     + Layoffs
   * Compliance
     + Final settlements
     + Pension plans
     + Exit documentation
   * Policies
     + Offboarding procedures
     + Knowledge transfer
     + Access revocation
8. **55.90 Analyze HR**
   * Metrics
     + Employee turnover rate
     + Employee satisfaction
     + Training effectiveness
     + Diversity metrics
   * Reports
     + HR analytics
     + Workforce planning reports
     + Compliance reports
     + Performance metrics

# 55.02.001 Hire to retire storyline design review workshop

The Hire to retire storyline design review workshop is a crucial step in refining the design of the human resources management process. This workshop focuses on reviewing the storyline or happy path defined in the Hire to retire scenario board discovery workshop, conducting a fit-to-standard review, reviewing the configured solution, and reviewing high-level designs and slides for parts that cannot be demonstrated. This workshop takes place after the initial Hire to retire scenario board workshop and is based on the initial discovery phase. During this session, we will delve deeper into the chosen storyline or happy path, ensuring that it aligns with business requirements and standards. We will also identify any gaps or areas that need further refinement. By the end of this workshop, the aim is to achieve 80-90% accuracy and acceptance for the selected storyline, ensuring that we are well-prepared for the next phases of the project.

## Assumptions

* The agreed business scope from the first workshop is completed.
* Dynamics 365 has been configured for the key storyline selected.
* The key stakeholders are available and actively contribute to the workshop. The following stakeholders are recommended:
  + HR managers - responsible for managing the lifecycle of employees from hiring to retirement
  + IT department - responsible for implementing and maintaining technology solutions to support the Hire to retire process
  + Finance department - responsible for tracking employee costs and benefits
  + Operations department - responsible for aligning workforce with business operations
  + Legal and compliance department - responsible for ensuring regulatory compliance related to HR management
  + Executive leadership - responsible for overseeing HR strategies and ensuring alignment with strategic goals
  + Human resources department – responsible for hiring, training, and managing employees

## Objectives

* Demonstrate Dynamics 365 capabilities: Showcase how Dynamics 365 can address the identified pain points and improve the Hire to retire process.
* Gather feedback and insights: Collect feedback from stakeholders to tailor the Dynamics 365 implementation to their specific needs.
* Define next steps: Outline the next steps and action items for the Dynamics 365 implementation.
* Document gaps, risks, issues, and decisions: Ensure all critical points are documented for future reference and action.

## High-level agenda

* Introduction and objectives
* Demonstration of Dynamics 365 solution for the storyline scenario
* Detailed discussion on key scenarios
* Interactive Q&A session
* Wrap-up and next steps

## Key questions

* Fit-to-standard review
  + Does the proposed solution fit within the standard processes and guidelines of your organization?
  + Are there any gaps or areas that need further refinement to align with the standard solution?
  + How does the solution address the identified pain points and bottlenecks in your current process?

# 55.05.001 Develop people strategy deep-dive discovery workshop

The Develop people strategy deep dive discovery workshop is designed to help your organization establish a clear strategy for human resources development and management. This session will focus on understanding your overall strategy for developing people strategies, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in people strategy decisions are available and willing to participate.
* Current people strategy, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of HR management principles and compliance standards.
* Relevant data on people strategy, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in developing people strategy?
  + What systems are currently used for developing people strategy?
  + Can you describe the current processes for developing people strategy?
  + What are the main pain points in your current people strategy development process?
  + How do you define and measure the success of your people strategy today?
* Volume of transactions
  + How many transactions do you process monthly/annually for people strategy development?
* Approval processes and policies
  + What approval processes are in place for developing people strategy?
  + Are there specific policies that govern people strategy development?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to developing people strategy?
  + How do you currently ensure compliance with these requirements?

# 55.10.001 Recruit and onboard talent deep-dive discovery workshop

The Recruit and onboard talent deep dive discovery workshop is designed to help your organization effectively recruit and onboard talent using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for recruiting and onboarding talent, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in recruiting and onboarding decisions are available and willing to participate.
* Current recruiting and onboarding strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of HR management principles and compliance standards.
* Relevant data on recruiting and onboarding strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in recruiting and onboarding talent?
  + What systems are currently used for recruiting and onboarding talent?
  + Can you describe the current processes for recruiting and onboarding talent?
  + What are the main pain points in your current recruiting and onboarding process?
* Volume of transactions
  + How many transactions do you process monthly/annually for recruiting and onboarding talent?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for recruiting and onboarding talent?
  + Are there specific policies that govern recruiting and onboarding?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to recruiting and onboarding talent?
  + How do you currently ensure compliance with these requirements?

# 55.30.001 Manage workplace compliance deep-dive discovery workshop

The Manage workplace compliance deep dive discovery workshop is designed to help your organization effectively manage workplace compliance using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for managing workplace compliance, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in workplace compliance decisions are available and willing to participate.
* Current workplace compliance strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of compliance management principles and standards.
* Relevant data on workplace compliance strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in managing workplace compliance?
  + What systems are currently used for managing workplace compliance?
  + Can you describe the current processes for managing workplace compliance?
  + What are the main pain points in your current workplace compliance management process?
* Volume of transactions
  + How many transactions do you process monthly/annually for managing workplace compliance?
* Approval processes and policies
  + What approval processes are in place for managing workplace compliance?
  + Are there specific policies that govern workplace compliance?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to managing workplace compliance?
  + How do you currently ensure compliance with these requirements?

# 55.40.001 Manage performance and growth deep-dive discovery workshop

The Manage performance and growth deep dive discovery workshop is designed to help your organization effectively manage employee performance and growth using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for managing performance and growth, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in performance and growth management decisions are available and willing to participate.
* Current performance and growth management strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of performance management principles and standards.
* Relevant data on performance and growth management strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in managing performance and growth?
  + What systems are currently used for managing performance and growth?
  + Can you describe the current processes for managing performance and growth?
  + What are the main pain points in your current performance and growth management process?
* Volume of transactions
  + How many transactions do you process monthly/annually for managing performance and growth?
* Approval processes and policies
  + What approval processes are in place for managing performance and growth?
  + Are there specific policies that govern performance and growth management?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to managing performance and growth?
  + How do you currently ensure compliance with these requirements?

# 55.50.001 Manage time and attendance deep-dive discovery workshop

The "Manage time and attendance" deep dive discovery workshop is designed to help your organization effectively manage employee time and attendance using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for managing time and attendance, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in time and attendance management decisions are available and willing to participate.
* Current time and attendance management strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of time and attendance management principles and standards.
* Relevant data on time and attendance management strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in managing time and attendance?
  + What systems are currently used for managing time and attendance?
  + Can you describe the current processes for managing time and attendance?
  + What are the main pain points in your current time and attendance management process?
* Volume of transactions
  + How many transactions do you process monthly/annually for managing time and attendance?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for managing time and attendance?
  + Are there specific policies that govern time and attendance management?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to managing time and attendance?
  + How do you currently ensure compliance with these requirements?

# 55.50.002 Manage travel and expense deep-dive discovery workshop

The Manage travel and expense deep dive discovery workshop is designed to help your organization effectively manage employee travel and expenses using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for managing travel and expenses, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in travel and expense management decisions are available and willing to participate.
* Current travel and expense management strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of travel and expense management principles and standards.
* Relevant data on travel and expense management strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in managing travel and expenses?
  + What systems are currently used for managing travel and expenses?
  + Can you describe the current processes for managing travel and expenses?
  + What are the main pain points in your current travel and expense management process?
* Volume of transactions
  + How many transactions do you process monthly/annually for managing travel and expenses?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for managing travel and expenses?
  + Are there specific policies that govern travel and expense management?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to managing travel and expenses?
  + How do you currently ensure compliance with these requirements?

# 55.70.001 Manage compensation deep-dive discovery workshop

The Manage compensation deep dive discovery workshop is designed to help your organization effectively manage employee compensation using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for managing compensation, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in compensation management decisions are available and willing to participate.
* Current compensation management strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of compensation management principles and standards.
* Relevant data on compensation management strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in managing compensation?
  + What systems are currently used for managing compensation?
  + Can you describe the current processes for managing compensation?
  + What are the main pain points in your current compensation management process?
* Volume of transactions
  + How many transactions do you process monthly/annually for managing compensation?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for managing compensation?
  + Are there specific policies that govern compensation management?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to managing compensation?
  + How do you currently ensure compliance with these requirements?

# 55.70.002 Manage benefits deep-dive discovery workshop

The Manage benefits deep dive discovery workshop is designed to help your organization effectively manage employee benefits using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for managing benefits, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in benefits management decisions are available and willing to participate.
* Current benefits management strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of benefits management principles and standards.
* Relevant data on benefits management strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in managing benefits?
  + What systems are currently used for managing benefits?
  + Can you describe the current processes for managing benefits?
  + What are the main pain points in your current benefits management process?
* Volume of transactions
  + How many transactions do you process monthly/annually for managing benefits?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for managing benefits?
  + Are there specific policies that govern benefits management?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to managing benefits?
  + How do you currently ensure compliance with these requirements?

# 55.80.001 Offboard talent deep-dive discovery workshop

The Offboard talent deep dive discovery workshop is designed to help your organization effectively manage the offboarding of employees using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for offboarding talent, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in offboarding decisions are available and willing to participate.
* Current offboarding strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of offboarding principles and standards.
* Relevant data on offboarding strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in offboarding talent?
  + What systems are currently used for offboarding talent?
  + Can you describe the current processes for offboarding talent?
  + What are the main pain points in your current offboarding process?
* Volume of transactions
  + How many transactions do you process monthly/annually for offboarding talent?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for offboarding talent?
  + Are there specific policies that govern offboarding?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to offboarding talent?
  + How do you currently ensure compliance with these requirements?

# 55.90.001 Analyze HR programs deep-dive discovery workshop

The Analyze HR programs deep dive discovery workshop is designed to help your organization effectively analyze HR programs using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for analyzing HR programs, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in HR program analysis decisions are available and willing to participate.
* Current HR program analysis strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of HR program analysis principles and standards.
* Relevant data on HR program analysis strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Key questions

* Stakeholders, systems, and processes
  + Who are the key stakeholders involved in analyzing HR programs?
  + What systems are currently used for analyzing HR programs?
  + Can you describe the current processes for analyzing HR programs?
  + What are the main pain points in your current HR program analysis process?
* Volume of transactions
  + How many transactions do you process monthly/annually for analyzing HR programs?
  + What is the average value of these transactions?
* Approval processes and policies
  + What approval processes are in place for analyzing HR programs?
  + Are there specific policies that govern HR program analysis?
* Compliance and regulatory concerns
  + Are there any compliance or regulatory requirements related to analyzing HR programs?
  + How do you currently ensure compliance with these requirements?