



Client Onboarding Guide

Welcome to the Workzoom Community!

We're excited to have you on board. If you're like many of our clients, you're feeling energized by the opportunity to implement a solution that addresses your business challenges. That excitement often comes with questions—how do you turn this vision into reality?

This guide is here to help you do exactly that.

Our goal is to channel your enthusiasm into clear, actionable steps that will help you achieve your goals with Workzoom and start delivering value quickly. Along the way, we'll share best practices to help you make the most of your time and effort.

After reviewing this guide, you'll walk away with four key takeaways:

1. A Clear Understanding of What to Expect

You'll gain a solid grasp of how the onboarding journey works—from sprint-based planning to the roles you and our team will play. This clarity helps align your internal team and sets the stage for a smooth, confident start.

2. A Step-by-Step Framework to Guide You

We'll walk you through each phase of the onboarding process:

- Getting started
- Preparing and importing your data
- Following the setup path based on the modules you're implementing
- Training and validation
- Planning your roll-out and ongoing support

This structure ensures you always know what's next and how each step contributes to your success.

3. Tips, Resources, and Best Practices to Empower You

You'll be equipped with everything you need to take ownership of your Workzoom implementation, including:

- Self-guided orientation tips
- Access to easy-to-use questionnaires to capture your internal processes
- Best practices for documentation and training
- Guidance on testing and validating your setup

This guide is here to support you with helpful tips and insights as you build familiarity and confidence with Workzoom.

4. A Collaborative, Client-Led Approach

Most importantly, this guide reinforces that you're in the driver's seat. We're here to support and coach you, but you lead the way. That means you'll shape the system to fit your organization, build internal expertise, and roll out Workzoom on your terms—with our help every step of the way.

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Workzoom's Hands-On Implementation Approach

At Workzoom, we believe the best outcomes happen when our clients stay in the driver's seat. This is your project — and we're here as your technology partner to support, guide, and enable your success every step of the way.

From day one, you'll be hands-on with the system, shaping it around your organization's needs while learning how to confidently manage it long term. Our team brings deep product knowledge, proven configuration practices, and real-world problem-solving experience to help you unlock value quickly.

You'll set the priorities, control the pace, and lead the project. We'll be by your side — providing coaching, best practices, and regular working sessions to keep things moving smoothly and efficiently. This collaborative approach gives you full control, with guidance and assistance exactly where and when you need it.

It's a model that builds internal confidence, avoids unnecessary complexity, and delivers results that stick.

Getting Started

Every Workzoom onboarding project begins with the same foundational steps to help you get oriented, gather key information, and bring your people data into the system. From there, the path may vary depending on what you're implementing—but don't worry, it's all designed to be clear and straightforward.

Sprint Planning

Onboarding projects are carried out in sprints—focused periods of work lasting between **1-to-4-weeks**, each designed to deliver a specific outcome, ultimately leading to the relevant areas of the application being ready for you to **go live**. While **you are responsible for overall project management** (i.e. your team's time allocation and effort across the entire project), we will collaborate closely to plan and execute each sprint, ensuring that every step is purposeful and aligned with your objectives.

Self-Guided Orientation

The onboarding process starts with self-guided orientation. Before making any decisions about how to tailor the system, we want you to spend some time in it. Think of this stage like trying on a new pair of shoes — you get a feel for the fit, walk around a bit, and see how everything moves with you. Only then do you know what needs to be adjusted to make it just right.

Your Workzoom Liaison will help you get oriented and answer your questions on the areas of the system your team will be using, helping you explore how the pieces connect and support each other. For clients coming from fragmented tools or manual processes, this is often the moment where it clicks — you start to see how everything can live in one place and actually work together.

You don't need to know all the answers up front. Once you've had the chance to walk through the product and see it in action, it becomes much easier to spot opportunities to simplify, improve, or adjust things to better support your organization.

Client Preparation

To help you get started strong, we'll provide easy-to-follow questionnaires that guide your team in capturing key business policies and processes. Each area of Workzoom that requires fitting, (e.g. Recruiting or Time off) has its own short set of questions, typically completed in under 30 minutes for each business unit by the people who know the process best. These prep activities help set the stage for a smooth, informed configuration — and give your internal teams a clear sense of ownership right from the start.

Personnel Data Import and Validation

Getting your people data into Workzoom is a fast, collaborative process. You simply provide a well-organized spreadsheet with your core information (names, roles, compensation, hire dates, etc.), and we'll handle mapping and importing it. Most migrations involve up to two imports and are completed within days. For details on the types of data you may consider bringing over to Workzoom with formatting recommendations and tips, please use the following link:

<https://www.workzoom.com/personnel-data-load>

No need to stress about perfect spreadsheets. We can work with what you have — even if your data lives in paper files, Excel, or a legacy system. One reason you're moving to Workzoom might be because your current data is fragmented or unreliable. That's okay. We'll show you how to validate and clean it up in Workzoom so you can move forward with confidence and clarity.

Once you have provided us with your personnel data spreadsheet, we'll map it and import it into your sandbox. This will take a couple of days and then we'll have an online session where your Liaison will help you explore your sandbox and show you how to validate, update and maintain your personnel data. From there, depending on what modules you are onboarding with, the process will diverge into 3 possible streams.

Onboarding Streams

Some Workzoom modules are ready to use right out of the box, while others offer configurable options to better align with your business. Certain modules require more in-depth setup to tailor them to your organization's specific needs — helping you get the most value from the platform. Because of this, your onboarding journey may follow one or more of three streams.

Stream 1: Self-Adoption

 Personnel

 Organization

 Engagement

 Safety

 Learning

 Career Planning

 Succession

Modules in this stream are ready to go. After completing your self-guided orientation, personnel data validation and connecting with your Liaison for any guidance or questions, you'll be fully equipped to independently deploy and manage these modules at your own pace.

Stream 2: Guided Option Selection

 Recruiting

 Onboarding

 Performance

 Expenses

 Payroll Filings

 Scheduling (simple templates)

Modules in this stream enable you to select from defined options. Your Workzoom Liaison will use your completed questionnaires to fine-tune the configuration of the modules you're implementing within this stream. These adjustments are quick and straightforward, and you'll be able to see and validate the results firsthand in your sandbox environment. This process will occur in sprints, each designed to deliver a specific outcome. This process ensures that the platform is fitted effectively, empowering you to confidently deploy and manage Workzoom in the related areas.

Stream 3: Collaborative Fitting

 Time Off

 Timekeeping

 Scheduling (dynamic)

 Benefits

 Pay Processing

 Pay Financial Structure

For more complex areas of Workzoom, more collaborative fitting is required. This process will take place in sprints where you will work directly with a Workzoom Coach. In these sprints, key steps described in more detail below include:

1. Joint Fitting Sessions
2. Importing specific year-to-date amounts or point in time balances for testing
3. Validation and feedback loops
4. Payroll Parallels (for payroll conversions)

5. Final year-to-date, point in time and enrollment data loads and validation before go-live

Joint Fitting Sessions

Using the questionnaires you completed during the preparation phase, joint fitting sessions are **designed to teach Workzoom how your organization operates**. These collaborative sessions focus on configuring the system with the specific rules and structures that reflect your business. For example, fitting activities may include:

- Mapping compensation, time & pay codes
- Adjusting leave entitlement rules
- Automating time rules such as overtime
- Defining pay cycles

Where it makes sense, your Coach may make some of the smaller changes for you — especially in areas that require little day-to-day interaction. But the focus is always on helping your team build confidence and control so you're set up to manage and adapt the system long after go-live.

Validating Setup

Between sessions, you'll independently test and validate your setup in a real, working environment. This helps confirm:

- Your processes and workflows flow as expected
- Outputs (like reports or payslips) are accurate
- Security roles and access are appropriate

This part of the journey is where confidence grows — your team is hands-on, seeing how the system supports your goals, and fine-tuning where needed. This approach ensures you're actively involved throughout the process—eliminating long waits, surprises, and giving you confidence that the system will meet your expectations from the start.

Specific Year-to-Date Amounts or Point in Time Balance Loads

To support the conversion of Payroll, Time Off, and Benefits, additional data from your legacy systems will be required. This data is critical for validating the Workzoom setup and ensuring the system is populated with accurate, up-to-date information for year-end processing, leave balance tracking, and benefits administration—including enrollments, dependents, and payroll deductions.

We'll review the timing of each data import during sprint planning. In general, this data is needed both for validation and to support a successful go-live.

As with your initial personnel data load, we ask that each data set be submitted in a single, well-structured Excel spreadsheet. For example, when providing year-to-date payroll amounts, all relevant information should be included in one sheet.

To ensure Workzoom produces accurate results, it's essential that the data inputs are both complete and correct. As part of the overall validation process—including payroll parallel runs—you are responsible for providing accurate and comprehensive information, as well as reviewing and validating the results of each data import.

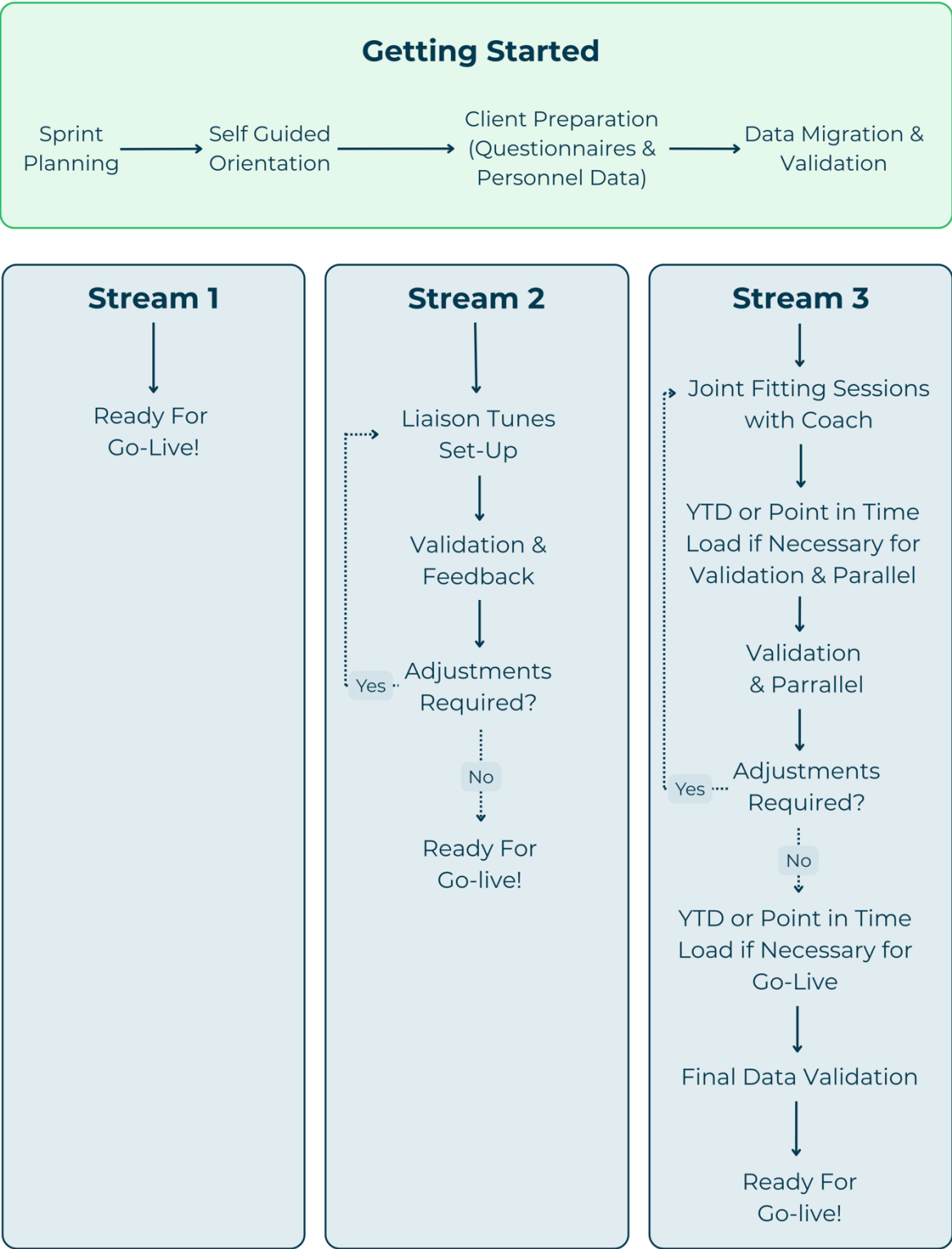
Parallel Payroll Runs

During payroll conversions, it's essential to validate the results generated by Workzoom against those from your legacy system. This process includes importing year-to-date amounts from your current system into Workzoom, running payroll in both systems, and comparing the outputs to ensure accuracy.

The questionnaires you completed at the beginning of the project will help identify what needs to be validated. Your Coach will also provide high-level guidance on how to carry out this process.

Typically, one or two parallel runs are enough to fine-tune Workzoom's configuration and confirm that results are accurate. If additional runs are needed, we'll discuss the potential impact on project timelines and costs with you.

This diagram offers a visual overview of the onboarding journey, highlighting where the process branches into the three streams.



Training and Knowledge Transfer

By the time you're ready to go live with any area of Workzoom, you'll have gained the confidence to deploy, manage, and support your organization effectively. Workzoom is designed to be intuitive and user-friendly, which means minimal training is required for administrators, managers, and employees.

Learning by Doing

The most effective way to learn Workzoom is through hands-on experience. Throughout the onboarding process, you'll engage directly with the platform, building familiarity and confidence as you go. This practical approach ensures that you're not just learning the system—you're mastering it in the context of your organization's unique needs.

Guidance and Resources

During the onboarding project, your Workzoom Liaison is your go-to resource for guidance. They're available to answer questions, provide insights, and help you navigate any challenges that arise.

In addition, Workzoom offers a variety of self-guided learning tools, including:

- Step-by-step guides
- Instructional videos
- In-solution help and tooltips

These resources are available on demand, allowing you to learn at your own pace and revisit topics as needed.

Train-the-Trainer Model

Workzoom uses a train-the-trainer approach to empower your internal champions. This model enables you to equip additional administrators, managers and team leads with the knowledge they need to train others effectively. You decide what's most important for your teams to know, ensuring training is relevant and aligned with your organizational goals.

Planning for the Future

It's important to plan for staff turnover and new hire onboarding. Because Workzoom has aspects that can be tailored to your specific business processes and objectives, its configuration may differ significantly from other organizations. To ensure continuity and consistency:

- Document your internal processes and configurations
- Create company-specific training materials
- Maintain up-to-date internal guidelines for administrators and managers

This internal documentation becomes a vital resource for onboarding new team members and maintaining operational efficiency.

Additional Training Options

Where needed, your Workzoom liaison or coach can provide additional training through online sessions. These sessions can be tailored to specific roles, processes, or areas of the platform.

Workzoom also offers optional end-user training packages. For more information on available options and pricing, please contact your Workzoom representative.

Roles and Responsibilities

Workzoom

During your onboarding project, Workzoom will provide guidance and assistance through the following roles:

Workzoom Liaison: This role is to assist you with your Workzoom orientation, and refine set-up in the Stream 2 areas of the application.

Workzoom Coach: This role is to assist you with fitting the application in the more complex areas to achieve your goals. While a Coach brings relevant experience and knowledge of Workzoom's best practices, they will rely on your internal experts to make decisions that reflect your specific business needs. Their role is to support and facilitate—not to provide consulting services.

During your onboarding, we also offer:

- a. **Orientation** to help you explore the system early, build familiarity, and prepare for the fitting process.
- b. **Questionnaires** to assist you in gathering key information about your business policies and processes in preparation for the onboarding project.
- c. **Assistance in fitting Workzoom** to your needs (e.g., adjusting leave policy configurations for entitlements, applicability and accrual methods, or guiding you on creating an employee self-assessment for performance reviews).
- d. **Training** through hands-on experience, guides, videos, and online sessions—designed to build confidence, deepen understanding, and empower you to use Workzoom effectively.
- e. **A sandbox environment** for you and your team to experience, adjust, and validate Workzoom to achieve your objectives.
- f. **People data import**, one or two times, where you provide your data in a well-structured spreadsheet, and we map and import it into Workzoom as the first step in the project.
- g. **Year-to-date payroll amounts and leave balance data loads** for payroll and time off conversions. Again, you provide your data in a well-structured spreadsheet, and we map and import it into Workzoom so you may conduct a parallel validation process and prior to roll-out so your balances are current in your production environment.
- h. **Benefits data load** of enrollments and dependents for benefit conversions.

- i. **A production environment** when you are ready for your roll out. We will copy your sandbox to create your production environment.

Client

The key things you bring to the project and are responsible for are:

- a. **Leadership** – One person or perhaps a small group who are ultimately accountable for the results that are going to be delivered in the organization and are in essence, sponsoring the project. They will be there to set the overall objectives, allocate resources, make final decisions that are required from your onboarding team and communicate these priorities, objectives and decisions to us.
- b. **Project Management** – You decide what approach you will take to Project Management. Whether informal or formal, a Project Manager can be a key resource that ensures everyone on your team stays focused on the key objectives. This role can often make scope and resource allocation decisions. It will be up to the Project Manager to make sure that your team is working on what is important to the business and tracking to the agreed upon timelines. Your Project Manager can expect to allocate 1 – 2 hours per week throughout the process on average.
- c. **Business Area Expertise** – Knowledge of your organization's rules, processes, and goals is essential for a successful Workzoom implementation. This expertise ensures that the system is configured to reflect how your business truly operates. Your Workzoom Liaison or Coach will guide the process using best practices, but it's your internal experts who provide the insights and decisions that shape the solution.
- d. **Providing well-structured data** – You provide your people data (e.g. names, positions, addresses, current compensation, hire date, etc.) to start and later depending on what you are implementing, year-to-date payroll amounts, leave balances and benefit enrollment & dependent data in well-structured spreadsheets.
- e. **Validating data** – Only you know your data, so you are responsible for validating its accuracy and completeness once it is imported into Workzoom and making any corrections, updates and adjustments through the application.
- f. **Validating configuration** – Again, only you know your business, so you are responsible for validating that policies and processes function the way you need them to in Workzoom to accomplish your objectives (e.g., did Workzoom calculate and process pays correctly, do the appropriate leave policies apply to the correct groups of employees, etc.).
- g. **Providing feedback** to us on gaps.
- h. **Keeping your sandbox current** - One of the ways you get immediate value from Workzoom is that your sandbox becomes your trusted system of truth for people data once the data validation process is complete. It's important to keep the people data in your sandbox up to date, as the sandbox will be copied when creating your production environment. If an experimental playground is needed during onboarding, your Coach can facilitate that. Once the

onboarding project is completed, your sandbox will be deleted. If you need extended access to a sandbox after the project, we are happy to discuss options and pricing.

- i. **Showing up on time and prepared** for all working sessions with us.
- j. **Providing any training** you deem required to employees, managers and additional administrators.
- k. **Creating documentation** - We offer guidance, and built-in help features to support you. However, because the application is tailored and configured to meet each client's unique objectives, its functionality can vary significantly from one client to another. As a result, it is essential for you to take responsibility for capturing and preparing your own documentation and guidelines for internal use. This ensures effective training for new administrators and provides company-specific guidance to managers.
- l. **Roll-out** – Planning and conducting the roll-out to your organization. You are in control of timing, process and change management. We help you get to a point where the application is ready for roll-out and you take it from there.

How Long Does Onboarding Take?

Onboarding with Workzoom is a flexible and collaborative process — and the pace is entirely up to you! We move as quickly as you're ready to go. The more focused and engaged your team is, the faster we can help you reach your goals.

Here's what helps speed things up:

- **Your effort matters:** The more concentrated your team's involvement, the quicker the progress.
- **Know your stuff:** Being familiar with your own policies and practices helps streamline decisions.
- **Clear goals = clear path:** Having well-defined objectives gives us a strong direction from the start.
- **Helpful tools:** Your Workzoom Liaison will provide you with module questionnaires that give you a great sense of the effort involved and will help you plan effectively.

We work in sprints lasting 1-to-4-weeks, and many clients achieve their goals in just one sprint — others may need a few more depending on their size and scope. The level of involvement required from your team will vary depending on your organization's objectives and complexity. You'll gain a clearer understanding of this commitment during the sprint planning and preparation phases.

No matter your pace, we're here to support you every step of the way!

Roll-out and Ongoing Support

You're Never on Your Own

Rolling out Workzoom is an exciting step forward—and you won't be doing it alone. While you'll take the lead in deciding how best to introduce Workzoom to your organization, we're here to support you with guidance, insights, and proven best practices to help ensure a smooth and effective launch.

A Strategic Roll-Out Builds Trust

A well-executed roll-out is key to building trust and gaining organizational buy-in. Whether you choose a phased approach or a full-scale launch, we can help you assess readiness, identify key stakeholders, and prepare your teams for success. The goal is to ensure that everyone—from administrators to end users—feels confident and supported as they begin using Workzoom.

Ongoing Support You Can Count On

Your journey with Workzoom doesn't end at go-live. Included with your subscription is access to our knowledgeable and responsive support team. Whether you have a quick question or need help troubleshooting an issue, our team is here to assist you.

You can find full details about our support services, including response times and service levels, in our Support Policy.

Continued Access to Your Liaison and Coach

Although regularly scheduled sessions with your liaison and/or coach may taper off after go-live, they remain an important part of our support network. They work closely with the Workzoom support team and are available to assist with escalations, strategic planning, or additional training needs as they arise.

Client-Specific Release Readiness

Workzoom is tailored to your organization during onboarding, resulting in a configuration that's uniquely yours. To help you continue experiencing a smooth and efficient operation, we support you in seamlessly integrating new platform enhancements.

- **Early Access to Upcoming Releases**

You can receive access to a sandbox environment for significant releases. This gives your team a chance to explore changes in advance to confirm alignment with your configured policies and workflows.

- **Guided Exploration**

We provide clear release notes and highlight areas worth reviewing based on your configuration. This helps you proactively adapt and optimize for peak performance.

- **Onboarding Insights**

During onboarding, we flag parts of your setup that may benefit from closer review during future updates. This helps ensure smoother transitions over time.

This collaborative approach allows you to stay in control of your environment while continuing to benefit from everything Workzoom has to offer.

Conclusion

In using the onboarding process outlined in this document you will successfully integrate Workzoom into your organization streamlining your processes, enhancing your efficiency, empowering your people and ultimately achieving your objectives and long-term success.

We look forward to assisting you with this journey!

Appendix 1: Best Practices, Tips and Insights

Don't Focus on the Details to Start

Almost every client we work with has highly intelligent and diligent people on their onboarding teams who have traditionally succeeded by ensuring everything is perfect from the start, meticulously handling all details. While we recognize the importance of details, they have their time and place. The initial focus of the project should be on addressing the high-level business challenges you aim to solve. In the early stages, the experience and overall feeling are more crucial than the specifics. As you progress through the project, the details that are important to your success will become clear.

At Workzoom, we often use the analogy of Rocks, Pebbles, and Sand. If you were to fill a jar with these items most effectively, you would start with the rocks, then add the pebbles, and finally the sand. To do it in a different order would mean fitting less of the rocks (your key objectives) into the jar.

Taking Notes vs. Effective Documentation

We recommend that you minimize note taking during working sessions with us. The fastest way to get value from Workzoom is to get into the product and play with it. Be curious and don't worry about being perfect! However, you may want to recap key things from a joint working session, particularly key decisions, what was accomplished and what takeaways there are. You are welcome to record sessions or use an AI note-taking app. However, please be aware that your Workzoom Liaison or Coach may need to consult internally before making any commitments that could alter our agreement or change the scope of the project.

What is far more useful than meeting notes is creating your own documentation. We offer guidance and built-in help features to support you. However, because the application is tailored and configured to meet each client's unique objectives, its functionality can vary significantly from one client to another. As a result, it is essential for you to take responsibility for capturing and preparing your own documentation and guidelines for internal use. This ensures effective training for new administrators and provides company-specific guidance to managers.

Emails

Your Workzoom Liaison and Coach are committed to supporting you and your team during the dedicated time you've agreed upon—just as they are for each of their other clients. To ensure every client receives the same level of focus and support, Liaisons and Coaches typically address questions and updates during your scheduled sessions rather than responding to emails in real time. This approach helps maintain efficiency, ensures thoughtful responses, and respects the time set aside for all clients equally.

Establishing Momentum

Momentum is the key to unlocking early success with Workzoom. The faster progress is made, the sooner your organization begins to realize value—leading to stronger buy-in from stakeholders and

freeing up key resources as their day-to-day improves. Momentum is built through consistent engagement: regular joint fitting sessions with your Coach and focused client effort in between. This hands-on involvement accelerates your understanding of Workzoom, speeds up validation and process alignment, and ultimately drives the project forward.

Getting the Most Out of Workzoom

Workzoom is a powerful platform designed to unify and automate your HR, Talent, Workforce, and Payroll processes. It's built to deliver value right out of the box, and many organizations find that embracing its existing features leads to faster results and smoother adoption.

From time to time, you may come across something you wish Workzoom could do differently or additionally. While we're always open to hearing your ideas, it's important to keep in mind that relying on enhancements isn't the most effective path to success. Instead, we encourage you to explore how Workzoom's current capabilities can meet your needs—often, there's already a way to achieve your goals within the system.

If you do have a suggestion, feel free to share it with your Workzoom Coach. They'll help you frame the idea and submit it for internal review. When evaluating enhancement requests, we consider several factors: how broadly the change would benefit the Workzoom community, the specific value it would bring to your organization, the development effort involved, and other priorities already in motion.

While we can't accommodate every request, we truly value your input and are committed to evolving Workzoom in ways that benefit the greatest number of users.

Project Team Changes and Absences

While unplanned personnel changes and absences may pose challenges, they also provide opportunities for other team members to step up and demonstrate their capabilities. To mitigate potential delays, build flexibility into your project schedule to accommodate absences and holidays, and encourage cross-training among team members to ensure coverage and continuity in case of changes to key personnel. Please also refer above to "Creating documentation" in the Client section as this is a useful step in further ensuring continuity during the project and on an ongoing basis.

Organizational Stability

Some clients try to coordinate and integrate organizational changes, such as re-orgs, policy and process changes, the implementation of other technology systems, union contract negotiations, with their Workzoom onboarding project. While it may seem like a good time to do it together as your new system is an ideal place to manage new requirements, organizational changes should ideally be planned outside the project's timeframe. Anticipated policy or process changes should be made and validated before your onboarding project begins. This allows these changes to be incorporated into the solution to achieve the desired state without requiring re-work or repetitive configurations. Additionally, validating data, processes, and results from Workzoom becomes more challenging without a baseline to work from and too much change at once can be challenging to absorb for any organization.

Scope Creep and Unanticipated Requirements

Getting a new solution is exciting, and as your onboarding project progresses, you'll discover more about Workzoom's capabilities and benefits. We encourage you to explore the solution to achieve additional objectives and address challenges you may not have previously considered. However, building momentum and staying focused on your initial key objectives will help you achieve success with Workzoom more quickly. Once the original scope is complete and you are live with Workzoom, you may find that some issues that arose during the project are no longer as important as they once seemed. We're here for you, so after you've spent some time with Workzoom, reach out to discuss any additional objectives you want to tackle. The success of the project relies largely on having a clear understanding of your key objectives and requirements before the project begins, and being open to considering alternative solutions and compromises during the onboarding process.

Large Teams

Managing a large team during the implementation phase can be complex. It is essential that all team members are consistently on call and that communication extends beyond scheduled meetings. Information must be effectively transferred among team members throughout the implementation process. Strong leadership is required to keep the team cohesively aligned with the organization's key objectives and prevent them from getting off track. Establish clear communication protocols and designate specific channels for updates and information sharing. This approach helps maintain alignment and prevents critical information from being overlooked, ensuring the project stays on track.

Process Frequency

Another important factor in planning resources and timelines is the frequency of your key processes, such as payroll processing. If you process payroll weekly, key resources may have insufficient time for thorough validation during a pay parallel, increasing the risk of errors. Conversely, if you process payroll monthly and miss the target time for conducting your parallel, the next opportunity won't come around for another month, potentially causing delays and complications. Therefore, the frequency of key processes should be carefully considered in your resource and timeline planning.