



Project Name

Project Kick Off

[Month Year] | Confidential

www.virtualresource.org



Agenda



Today's session is structured to launch the project with clarity and confidence

01	Introductions & Welcome <i>Meet the team and set the stage for collaboration</i>	10 mins
02	Programme Context & Objectives <i>Why this project, what success looks like, key constraints</i>	10 mins
03	Clarity on Scope <i>What is in scope, out of scope, and key considerations</i>	15 mins
04	Team Structure & Roles <i>VR and client roles, responsibilities, and time commitments</i>	10 mins
05	High-Level Timeline & Milestones <i>Review the POAP, key phases and go-live date</i>	10 mins
06	Ways of Working <i>Meeting cadence, tools, change control and status reporting</i>	10 mins
07	Next Steps & Actions <i>Immediate actions, owners and first two weeks plan</i>	5 mins

Programme Context & Objectives



Why this project — and what success looks like

Why This Project

- [Organisation] currently uses [X] separate Workday environments / tenants.
- This project will deliver [key objective — e.g. a unified Workday HCM solution / new module implementation / system optimisation].
- This engagement will [describe outcome — e.g. implement new modules / optimise configuration / migrate data] by [Go-Live Date].
- This kick-off marks the official start of delivery.

Key Constraints & Assumptions

- Go-live date of [Date] is fixed — timeline drives scope decisions
- Budget approved: [£X] — change requests follow formal CR process
- Client SME availability is confirmed per RACI — any changes must be agreed with PM

What Success Looks Like

Key Objective Met

Project delivered on time, with all agreed objectives met and validated

On Time & In Budget

Delivery to agreed POAP milestones; no uncontrolled scope expansion

Data Quality

Data cleansed, validated and signed off by named business owners

Business Adoption

HR teams trained and confident; line managers self-serving from day 1

Stable Hypercare

Post-go-live support complete within [X] weeks with no P1 incidents open

VirtualResource Project Team



Your dedicated team of Workday specialists for this engagement



[Name]

Programme Lead & Talent/Comp Architect

Bridges Talent and APR streams; drives stakeholder awareness and provides functional guidance.

UK

0.5 dpw



[Name]

Compensation Lead

Primary Compensation SME driving module enhancements and the Annual Performance Review cycle.

Poland

5 dpw



[Name]

Compensation Support

Supports configuration, data preparation, EB loads, report adjustments and testing coordination.

South Africa

5 dpw



[Name]

Integration SME

Ad hoc support to update integration links and BIRT reports as required throughout the project.

UK

Ad hoc (24 days)



[Name]

Project & Test Manager

Owns the project plan, test strategy and all governance artefacts. First escalation point for risks and issues.

South Africa

1→4 dpw

Team availability is as outlined above. Any changes to scope or timeline should be discussed with the Project Manager.

Clarity on Scope



A shared understanding of scope is critical to project success — please review and confirm

✓ IN SCOPE

- HCM Core — Job Architecture, Org Structure
- Compensation (Advanced Compensation, ASR)
- Absence & Time Off
- Security Model & Business Processes
- Reporting & Calculated Fields
- Payroll Configuration ([X] countries)
- Integration Re-mapping & Build
- Data Migration (all source systems)
- SIT, UAT, Parallel Payroll & Cutover

✗ OUT OF SCOPE

- [Item A — e.g. Recruiting module]
- [Item B — e.g. Benefits module]
- [Item C — e.g. Performance/Talent enhancements not related to migration]
- [Item D — e.g. New reporting dashboards beyond standard migration scope]
- [Item E — confirm with client]

⚠ CONSIDERATIONS

- [Item A — e.g. Absence policy harmonisation: requires business decision before config]
- [Item B — e.g. Grade structure mapping: 2 options to be confirmed by HR Director]
- [Item C — e.g. Payroll for Country X: sign-off required by [Date]]
- [Item D — Add any open items or assumptions that need resolution]

Any changes to scope must follow the Change Control process. Undocumented scope changes will not be delivered.

Team Structure



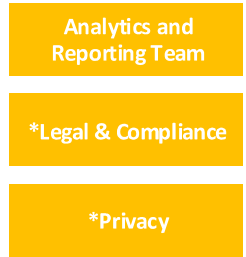
Programme governance structure and workstream leads

Program Management

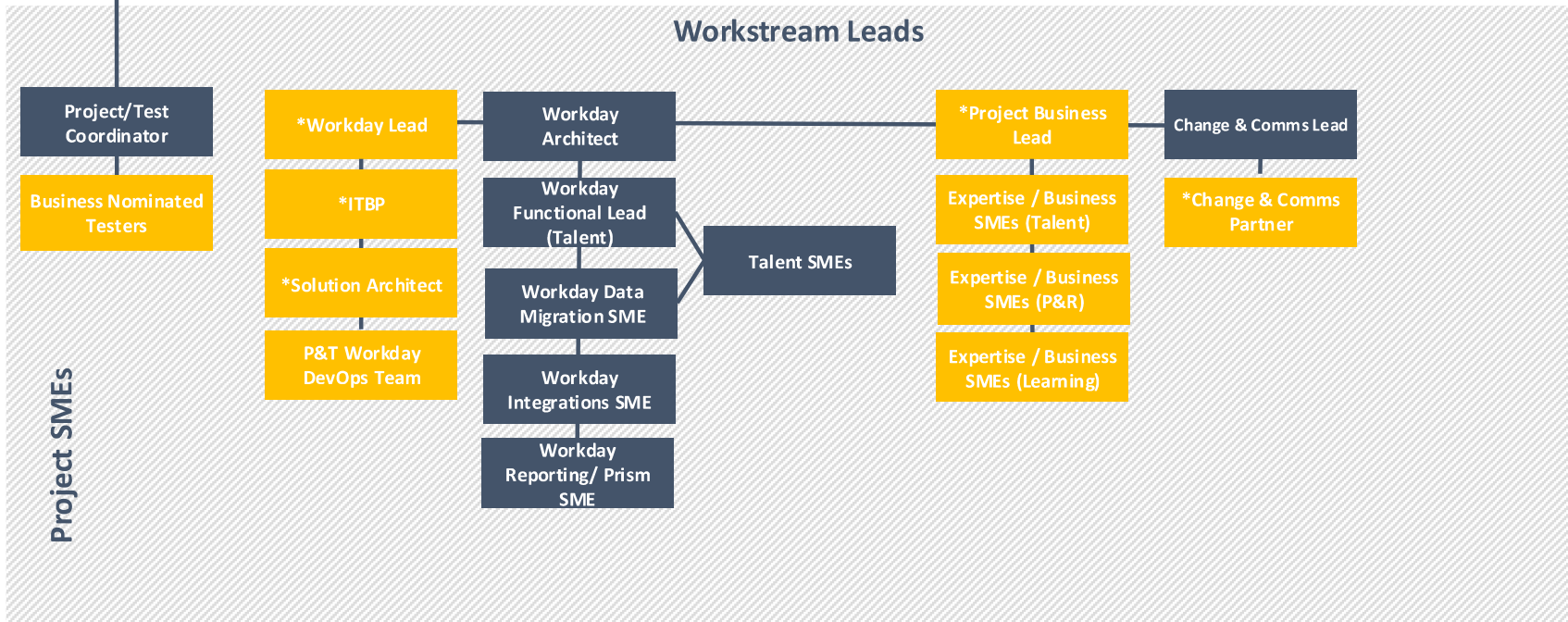


Stakeholder Groups

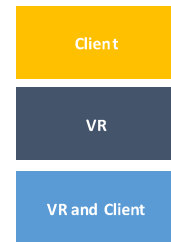
- Certain resources to be available as needed (e.g. Architect)
- Business SMEs are key to successful implementation, so ensure you get focused people who fully understand their function



Workstream Leads



*Approvers within the program governance



Key Roles & Responsibilities



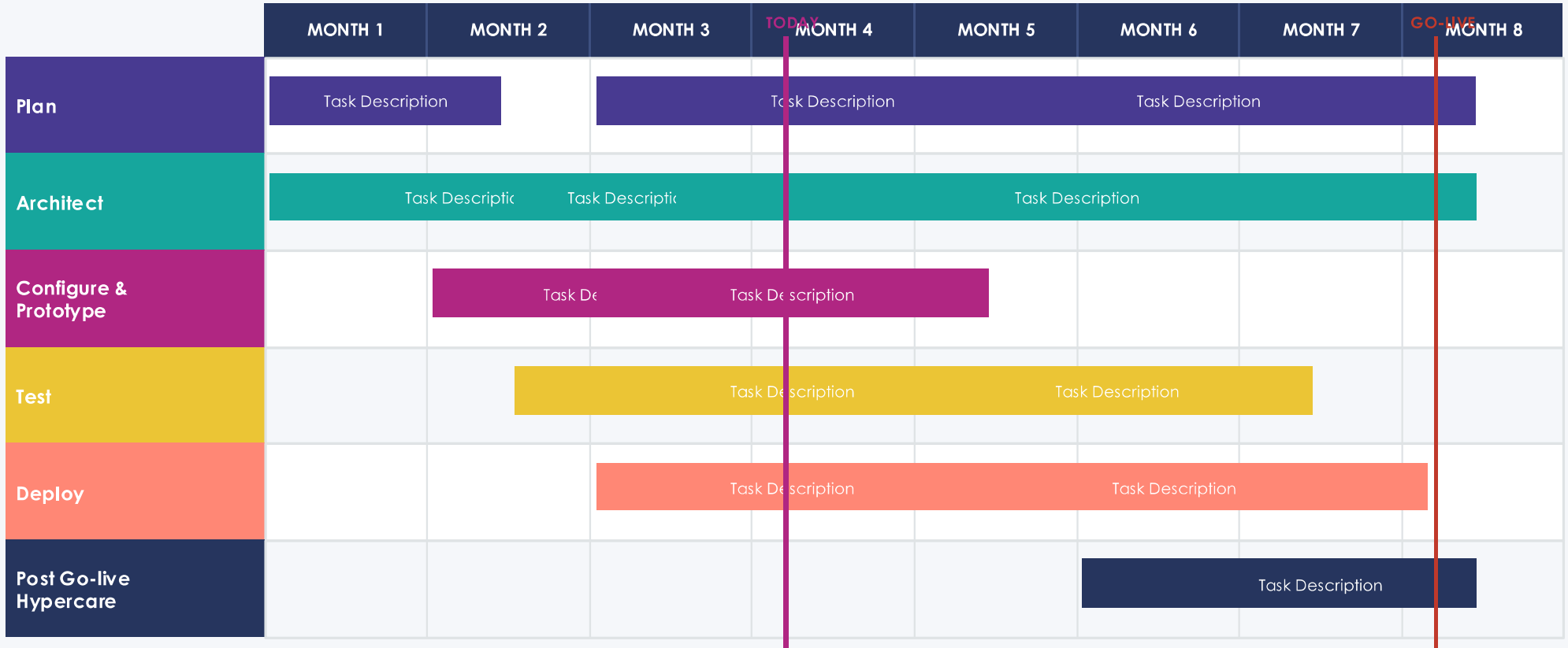
Who does what — client and VR responsibilities at a glance

Role	Side	Key Responsibilities	Time
Executive Sponsor	Client	Overall approver for go/no-go decisions. Main accountability for project success and executive stakeholder engagement.	10%
Business Lead(s)	Client	Drive business decisions; coordinate requirements-gathering; own data, integration and reporting requirements; prioritise.	50%
Business SME(s)	Client	Support Business Lead across Talent, Performance and Learning; attend workshops; support testing phases.	25–50%
Data Owners	Client	Decision makers for role access to data elements. Responsible for security setup sign-off.	0%
Project Manager / Test Manager	VR	Own the Project Plan and test strategy; first escalation point for risks, issues and decisions; provide regular project updates.	100%
Workday Functional Lead	VR	Provide Workday advisory; own system deliverables; validate technical design; facilitate requirements; document solutions.	100%
Workday Functional SME	VR	Support impact analysis; build and unit test changes; support E2E testing, fixes and production deployment.	100%
Change & Comms Lead	VR/TBC	Create and execute change action plan including comms, training, business readiness assessments and standards adherence.	30%

High-Level POAP — Programme Timeline



Add actual months and milestone dates before presenting to client



Populate actual months, task names and milestone dates before circulating to the client.

Status Reporting — Proposed Format



Weekly status report template — to be issued every [day] by the Project Manager

Executive Summary

- [2–4 sentences max. Overall project health. Key achievement this period. Top risk or issue.]
- Path to Green: [What needs to happen to move any AMBER items to GREEN]

Status reports should be 1 page max. Decision items must be flagged in red. No surprises in SteerCo.

RAG STATUS

Previous RAG



Current RAG



Trend



Progress This Period

- [Achievement 1]
- [Achievement 2]
- [Achievement 3]

Plans Next Period

- [Plan 1]
- [Plan 2]
- [Plan 3]

Upcoming Milestones

[Date] [Milestone]

On Track

[Date] [Milestone]

On Track

[Date] [Milestone]

At Risk

Workstream Status Update — Template



Weekly workstream update table — owners update their row before each status meeting

Workstream / Owner	Progress This Period	Decisions / Escalations Required	Planned Activities Next 2 Weeks	RAG
Functional [Owner Name]	Example: Blueprint signed off. Config 80% complete.	None	Update UL7 notifications. Compensation prototype review.	GREEN
Integration [Owner Name]	Example: 31/47 integrations built. 3 delayed.	ADP Germany build delayed — recovery plan needed.	Execute delayed builds. Move to SIT.	AMBER
Data [Owner Name]	Example: Mock 1 complete. 127 errors resolved.	Data owner assignment required — Tenant B records.	Mock 2 prep. Data validation kick-off.	GREEN
Testing [Owner Name]	Example: Unit testing complete. SIT start at risk.	Cornerstone delay consuming SIT buffer. Decision needed.	SIT planning. UAT resource confirmation.	AMBER
Change [Owner Name]	Example: Comms plan approved. Training scoped.	None	Line manager briefings. Training module build.	GREEN

Collaboration Tools & Access



All team members must be onboarded to these tools during Week 1 — no access = no delivery

Workday Tenant(s)

Primary environment for all Workday build, configuration and testing activities.

Request: Workday Admin

Owner: VR PM

Microsoft Teams

Primary collaboration hub for team communication, daily stand-ups and project documentation storage.

Request: Project Manager

Owner: VR PM

Jira

Testing tool for managing and tracking test cases across all testing phases (E2E, DRT, SRT).

Request: Test Manager

Owner: VR PM

SharePoint

Long-term document storage and version control for formal project artefacts and deliverables.

Request: Project Manager

Owner: VR PM

WinSCP / Cyberduck

Data migration tool for digital content transfers and file management during migration phases.

Request: Data Lead

Owner: VR PM

Change Control Log

Formal logging and tracking of all changes to project scope throughout the delivery lifecycle.

Request: Project Manager

Owner: VR PM

Change Control Process



All scope changes must be formally logged before any work commences



Key Principles

All changes formally logged before work begins · Workstream Leads own first-level triage · PM escalates cross-workstream or high-cost items

Approval Forums

Workstream Team Meeting: initial review · Design / Demand Forum: cross-functional review · Sponsor Call: high-impact or high-cost items



Proposed Meeting Cadence

A consistent weekly rhythm keeps the team aligned and surfaces risks early

MON	TUE	WED	THU	FRI
Core Team Check-In	PMO Connect	Core Team Check-In	Sponsor Check-In	Core Team Check-In (wider)
Align on weekly priorities and flag blockers	PM sync — plan review and risk/issue triage	Midweek progress review	Executive update and decision escalation	End-of-week wrap-up, status update and planning
		Change Control Board	SteerCo (monthly)	
		Scope review and CR triage	Governance, approvals, programme health	

Meeting invites will be circulated by the Project Manager during Week 1. All recurring meetings must be accepted and blocked in calendars immediately.

Next Steps — First Two Weeks



Immediate actions to get the project moving — owners and due dates agreed today

#	Action	Description	Owner	Due
1	Set Up All Team Meetings	Circulate recurring calendar invites for all cadence meetings. Confirm attendance and dial-in details with all participants.	PM	Week 1
2	Establish the Work Environment	Provision MS Teams folder/channel structure. Confirm Workday Tenant access for all configuration and testing team members.	PM	Week 1
3	Build Out the Project Plan	Develop next level of detail in the POAP — workstream tasks, resource assignments and dependencies aligned to milestones.	PM	Week 2
4	Schedule Initial Education Session	Organise a Workday scope education session for key client stakeholders — prerequisite for meaningful requirements gathering.	Functional Lead	Week 2
5	Confirm Data Migration Scope	Confirm the data migration scope for each source system and initiate conversations with third-party data extraction contacts.	Data Lead	Week 2
6	Finalise Scope Document	Circulate the in-scope / out-of-scope / considerations list from today for client sign-off. Any changes follow the change control process.	PM	Week 1



Let's build something great.

Questions, Actions & Discussion

- Scope sign-off to be returned to PM by [Date]
- Meeting invites issued within Week 1
- Next meeting: [Meeting Name] | [Date & Time]

