RelocationIQ

User Guide

Plan smarter relocation programs. Prove the ROI.

What each capability does, why it matters,
and how to configure it.

Quick Start

Follow these six steps to go from an empty workspace to a branded, publishable relocation program in about an hour. Each step links to a full section later in this guide.

1. Set up your workspace (5 min)

- Settings → Your profile: confirm your name and title.
- Settings → Company profile: add company name, Industry, Company size (Startup / SMB / Mid-market / Enterprise / Global), website, main email, phone, HQ address, and the HR contact block (name, email, phone). Industry AND Company size feed Guided Setup — set them once and every AI wizard pre-fills.
- Settings → Members: invite HR, mobility, and finance teammates as editors or viewers.

2. Build your Talent Plan (10 min)

- Fastest path: open Talent Plan → click Guided setup. The AI proposes a full plan sized to your industry, company size, and budget.
- Already have tiers in your Talent Plan? Turn on 'Use my existing Talent Plan' at the top of Guided Setup. The wizard preserves your role labels, hires, and % relocating (auto-pinned) and only recommends the best program and per-move cost per row.
- Prefer manual? Add a row per role tier (IC, Manager, Director, VIP), planned hires (12-month rolling), and the % relocating under each program.

3. Explore variants & refine (5 min)

- From Guided Setup, click Explore scenario variants for three parallel plans: Cost-Conscious, Balanced, Talent-First.
- Click Refine with chat on any variant to reshape it in natural language ('shift junior hires to Managed Lump Sum'). The diff dialog + Impact Summary shows exactly which rows changed and the $ / ROI impact.
- Materialize any variant into the Scenario engine when you like it.

4. Configure Policy Builder (15 min)

- Open the Recommended policies to build panel on Guided Setup — each program card deep-links straight to Policy Builder for the rows that use it.
- Turn on the benefits each program offers. Use Suggest costs to pre-fill unit costs with AI, then adjust.
- Open the HHG Policy tab and set weight/dollar caps, SIT days, autos, valuation, and excess-weight rules per program.
- Zero out RMC Services & Fees for any bundled/managed vendor to avoid double-counting.

5. Model Scenarios (10 min)

- Create a scenario, set assumptions (HHG weight, distance, gross-up %). Use property lookup and distance auto-fill to ground the estimate.
- Generate the AI executive summary to share with finance and leadership.

6. Track, tax, publish (15 min)

- Add relocating employees under Employee Relocations — benefits auto-seed from the assigned program. Edit or cancel as plans change.
- Review Tax & Gross-Up to validate taxable benefit treatment.

- Policy Builder → Publish Policy: download a branded .docx / .pdf handbook per program.
- Employee Relocations → Benefit Summary: print, download, or email the employee-facing summary.
- ROI Dashboard: tune business-value levers to prove payback to leadership.

That's it — you now have a defensible relocation program, budgeted, governed, and ready to hand to employees. Read the rest of this guide for the full detail on each capability.

1. Introduction & Recommended Workflow

RelocationIQ helps HR, mobility, and finance teams plan relocation programs, model costs, govern spend, and prove ROI — for both domestic and international moves.

Recommended workflow

- Settings — fill in your Company profile, especially Industry and Company size, so AI features personalize to you.
- Talent Plan — either enter role tiers manually OR click Guided setup for an AI-proposed plan sized to your industry & budget.
- Explore variants — generate Cost-Conscious / Balanced / Talent-First plans, refine with chat, and pick a winner.
- Policy Builder — turn on the benefits each program offers, set unit costs, and define HHG rules.
- Scenarios — set assumptions (weight, distance, gross-up) and compare side-by-side.
- Employee Relocations — track individual moves; benefits auto-seed from the assigned program.
- Tax & Gross-Up — validate taxable benefit calculations.
- ROI Dashboard — tune business-value levers and review payback.

Every capability in this guide follows the same structure: What it is, Why it matters, and How to configure — the last one only when it isn't obvious from the screen.

2. Workspaces, Settings & Team

Workspaces & member roles

What it is. Each workspace holds its own talent plan, policies, scenarios, employees, and RFPs. Members have owner, editor, or viewer roles.
Why it matters. Roles keep sensitive salary and cost data from spreading. Owners control billing and destructive changes; editors do day-to-day work; viewers get read-only insight for finance or leadership.
How to configure.

- Switch workspaces from the top-left dropdown in the sidebar.
- Invite teammates in Settings → Members and pick a role.
- Only owners can delete workspaces or change billing.

Your profile & Company profile

What it is. Settings → Your profile (editable name and title) and Settings → Company profile (Company name, Industry, Company size, Website, Main email, Phone, HQ Address).
Why it matters. Industry and Company size are the two defaults every AI wizard in the product — Guided Setup, variants, suggestions — uses to size your talent plan and pick program recommendations. Setting them once here means every wizard is personalized without re-entering data.
How to configure. Open /app/settings and fill in both cards. Industry uses the same catalog the AI uses (Technology, Financial Services, Manufacturing, etc.); Company size is Startup / SMB / Mid-market / Enterprise / Global.

HR contact block

What it is. A name, email, and phone number stored on the workspace that appears on every Benefit Summary handed to a relocating employee.
Why it matters. Gives the employee one clear person to call with policy questions — cuts inbound HR tickets and keeps mobility as a personal experience, not a form.
How to configure. Settings → Company profile → HR Contact fields. Saves immediately and appears on the next Benefit Summary you print or email.

3. Talent Plan & Guided Setup

Role tiers & planned hires (manual)

What it is. A grid of role tiers (e.g. Individual Contributor, Manager, Director, VIP) with planned hires per year and the percentage expected to relocate under each program.
Why it matters. Anchors every downstream cost estimate. Without a talent plan, Policy Builder and ROI numbers are guesses; with one, they're a budget you can defend.
How to configure.

- Open Talent Plan and add a row per role tier you actively hire for.
- Set planned hires (12-month rolling).
- For each tier, allocate the % relocating across program types (Managed Lump Sum, Reimbursement, Core-Flex, VIP).

Guided Setup (AI wizard)

What it is. An AI wizard at /app/talent-plan-setup (also reachable from the Talent Plan 'Guided setup' button) that proposes an entire talent plan from a few inputs: industry, company size, expected annual relocations, annual relocation budget, talent scarcity, homeowner share, executive share, and domestic/international mix.
Why it matters. Turns a blank Talent Plan into a defensible, industry-benchmarked starting point in under a minute — and every row remains fully editable.
How to configure.

- Industry and Company size auto-populate from Settings → Company profile.
- Adjust the sliders / dropdowns and click Generate proposal.
- Every row is editable inline: change tier count, hires, % relocating, program, or per-move cost; add or remove tiers; pin rows you want preserved on subsequent refinements.
- A live budget-fit analysis shows how the plan compares to your target spend.

Use my existing Talent Plan

What it is. A toggle at the top of Guided Setup that appears when your workspace already has Talent Plan rows. When on, the wizard seeds itself from your current tiers — role labels, planned hires, and % relocating are preserved and auto-pinned — and asks the AI only to recommend the best program and per-move cost for each row.
Why it matters. Stops the AI from re-inventing tiers you already agreed on with your talent team. You keep your headcount structure; the AI focuses on the policy call: which program fits each tier and what a realistic per-move cost looks like.
How to configure. On Guided Setup, flip 'Use my existing Talent Plan' to on. Expected relocations is derived from your plan automatically. Toggle off to start fresh.

AI proposal variants: Cost-Conscious / Balanced / Talent-First

What it is. From Guided Setup, one click generates three parallel plans: Cost-Conscious (leans on Lump Sum Check & Reimbursement to minimize spend), Balanced (mix of Managed Lump Sum and Core-Flex), Talent-First (Core-Flex and VIP to maximize acceptance and retention).
Why it matters. Real trade-off conversations happen when leadership sees three costed options side-by-side, not one recommendation. Each variant materializes into the Scenario engine with one click for full ROI comparison.
How to configure. Click Explore scenario variants on Guided Setup. Compare side-by-side; click Send to Scenarios on any variant to run it against ROI.

Refine with chat

What it is. Each variant card has a Refine with chat button. Type feedback in natural language — 'shift junior hires from VIP to Managed Lump Sum', 'cap senior tier at 12 hires', 'add a Director tier at 60% relocation'. The AI regenerates just that variant while preserving pinned rows.
Why it matters. Iterate on a plan the way you'd talk to a mobility consultant — no spreadsheet gymnastics. Pinning protects the rows you've already agreed to.

Diff & Impact Summary

What it is. After any refinement, a dialog shows exactly which plan rows were added, removed, or changed with the per-row $ delta and the total cost & ROI change. The Impact Summary panel ranks changes by dollar impact and decomposes each row's delta into its drivers (hires, % relocating, per-move cost, program switch), and calls out the ROI direction.
Why it matters. Refinements can shift totals in non-obvious ways. The diff + Impact Summary make every AI change auditable, and Revert to previous restores the prior state in one click.

Recommended policies to build

What it is. A full-width panel that appears after the proposal renders. It aggregates rows by program (Lump Sum Check, Managed Lump Sum, Reimbursement, Core-Flex, VIP) and shows which roles + move volume + estimated spend fall under each program.
Why it matters. Guided Setup answers 'what does my plan look like'; the Recommended policies panel answers 'now which policies do I need to build'. Every program card has a Configure in Policy Builder → button that deep-links to Policy Builder so you can enable the right benefits and confirm unit costs for that mix.
How to configure. No configuration — the panel appears automatically once a proposal exists and follows any edits or refinements you make.

4. Policy Builder

Benefit toggles & unit costs

What it is. For each program (Lump Sum Check, Managed Lump Sum, Reimbursement, Core-Flex, VIP), toggle which benefits are included and set the unit cost.
Why it matters. The unit costs drive every scenario, employee estimate, and ROI number. Getting them right once here is worth hundreds of one-off cost updates.
How to configure.

- Pick a program tab at the top.
- Toggle a benefit on/off, then click the price to edit.

- Hover any benefit label for a tooltip explaining what it covers.

Suggest costs (AI helper)

What it is. One click asks RelocationIQ to propose typical vendor/RMC unit costs for administrative and per-move line items missing a price.
Why it matters. Most HR teams don't have current RMC rate cards. Suggest costs gives you a defensible starting point in seconds, then you refine.
How to configure. Click Suggest costs. Review each proposal in the dialog. Accept the ones you want; nothing changes until you click Apply.

RMC Services & Fees category

What it is. Vendor-billable services like a dedicated counselor, exception management, policy counseling, and pre-move consult — separated from employee benefits so they're easy to see.
Why it matters. Most RMCs bundle these into a flat management fee. Listing them separately lets you either enter them line-by-line or zero them out and enter the bundled fee once — without double-counting.
How to configure. If your RMC bundles these, set each RMC Services & Fees line to $0 and add the bundled fee as a separate line. If they itemize, keep each line and enter the vendor's rate.

Program models we support

RelocationIQ intentionally models five program types you can plan, cost, and prove ROI against.

- Lump Sum Check: A flat cash payment to the employee with no vendor involvement. Simple to administer; limited governance.
- Managed Lump Sum: Company hires an RMC or moving vendor against a per-move cost cap. Vendor invoices go to the company up to the cap; the employee covers overage. Often called a capped lump sum.
- Reimbursement: Employee pays vendors out of pocket and submits receipts. Company reimburses eligible line items up to caps, usually with gross-up on taxable items.
- Core-Flex: A defined set of core benefits (HHG shipment, temp housing, home-finding trip) plus a smaller cash flex allowance for optional needs.
- VIP: Executive/senior leader package: full-service HHG, extended temp housing, home sale, spouse/partner support, gross-up on taxable items.

5. Household Goods (HHG) Policy

HHG rules per program

What it is. A dedicated tab in Policy Builder where you set the household-goods shipment rules for each program: caps, storage, autos, valuation, and what's in vs. out.
Why it matters. HHG is the single largest and most volatile relocation cost. Clear caps prevent van-line overages, exceptions creep, and post-move disputes with employees.
How to configure.

- Open Policy Builder → Household Goods tab and pick a program.
- Weight cap (lbs) and dollar cap ($) — either or both.
- Storage-in-transit (SIT) days — typical 30, 60, 90.
- Autos shipped — 0, 1, or 2.
- Valuation coverage — full-value replacement vs. released rate.

- Excess-weight rule — Employee pays / Prorated / Hard cap.
- Mark each HHG service Included, Excluded, Capped, Requires preapproval, or Employee-paid.
- List excluded items (hazmat, firearms, plants, alcohol, boats, high-value art).
- Rules snapshot onto each employee record when the program is assigned, so mid-year policy changes don't disturb in-flight moves.

Publish Policy — branded handbook export

What it is. A handbook-ready policy document generated from the program you selected, complete with cover page, benefit table, HHG rules, tax treatment, repayment clause, and HR contact block — branded with your licensee logo and color.
Why it matters. Every HR team eventually needs a written policy for the employee handbook and legal review. Publish Policy produces one in seconds that stays in sync with what Policy Builder actually pays for — no more year-old Word docs contradicting the plan.
How to configure.

- Open Policy Builder → Publish Policy tab.
- Pick a program.
- Optionally override Purpose, Eligibility, Exceptions, and Repayment language. Leave blank for smart defaults.
- Click Download .docx (to edit in Word) or Download .pdf (to distribute as-is). Content is identical between formats.

6. Scenarios

Scenario modeling

What it is. Named scenarios that combine your talent plan, policies, and assumptions (HHG weight, distance, gross-up %) into a total cost with a full breakdown.
Why it matters. Lets you A/B compare options — 'What if we cap HHG at 12k lbs?', 'What if we move to Core-Flex for managers?' — before you touch a policy.
How to configure.

- Open Scenarios → New scenario.
- Set global assumptions.
- Duplicate a scenario to change one variable and compare side-by-side.
- Materialize a Guided Setup variant directly into Scenarios with one click.

Property lookup & driving distance

What it is. Enter an origin and destination address; RelocationIQ estimates HHG weight from square footage and computes driving distance via Google Maps.
Why it matters. Distance drives van-line cost and per diem estimates. Automating the lookup replaces error-prone ZIP-to-ZIP guesses.
How to configure. In a scenario, use Property lookup, enter both addresses, and click Estimate. No API keys required — RentCast and Google Maps are provided by the platform.

AI executive summary

What it is. A CFO/CHRO-ready narrative generated from the scenario's inputs and totals: program mix, cost drivers, notable exceptions, recommended next steps.

Why it matters. Turns numbers into a story leadership will read. Cuts hours of slide prep before every mobility review.
How to configure. Open a scenario and click Generate summary. The model is set platform-wide by admins — no per-user picker.

7. Employee Relocations

Add / edit / cancel a relocation

What it is. Track every planned or active move: name, program assignment, status, origin/destination, dates, and estimated cost. Benefits auto-seed from the assigned program.
Why it matters. One source of truth for mobility. Prevents the classic 'HR forgot to tell payroll' failure and keeps ROI numbers grounded in real moves, not forecasts.
How to configure.

- Add — Employee Relocations → Add Employee. Split first/last name, origin & destination, program, salary.
- Edit — click any row and edit fields like move date, program, or status.
- Cancel — click Cancel to mark the move cancelled with a reason. It stays in history for reporting but is excluded from active spend.

HHG tab & exception workflow

What it is. A per-employee card showing estimated and actual HHG weight/cost against the program's policy cap, with an exception request flow when a move needs to exceed the cap.
Why it matters. Exceptions are where relocation budgets die. A structured request → approval trail replaces email threads and captures the tax impact on the record.
How to configure.

- Open an employee → Shipment & HHG tab.
- Review estimated vs. actual weight and cost.
- Click Request exception. Enter the requested amount, reason, and tax impact.
- Approvers act on the request; approvals log to the employee and roll into ROI.

Benefit Summary (printable / emailable)

What it is. A one-page personalized summary of every benefit the employee gets under their assigned program, taxability, and the HR contact block.
Why it matters. Reduces employee anxiety and inbound HR questions. Gives the employee something concrete on day one instead of 'we'll get you a policy soon'.
How to configure. Open the employee → click Benefit Summary → Print or Save as PDF. Uses your licensee brand automatically.

8. Tax & Gross-Up

Gross-up applied to taxable benefits

What it is. An additional payment the employer makes to cover the employee's tax liability on relocation benefits, so the net benefit matches the stated value.
Why it matters. Most relocation benefits are taxable income under the Tax Cuts & Jobs Act. Without gross-up, a $10,000 benefit lands as ~$6,500 in the employee's pocket — and that's how offers get rejected.

How to configure. Set the gross-up % per scenario (typical 30–45%). The engine applies it to the taxable portion of each benefit automatically.

Tax Calculator

What it is. A standalone tool that estimates federal, state, and FICA gross-up for a single relocation package.
Why it matters. Perfect for one-off checks — a recruiter negotiating an offer, an HRBP validating a payroll entry.
How to configure. Open Tax Calculator, enter taxable benefit total, state, and filing status. Tax tables are managed centrally by the platform team, so numbers stay current.

Embedded calculator (licensees)

What it is. The same Tax Calculator embeddable on your marketing site via iframe, branded with your licensee logo. Every submission creates a lead.
Why it matters. Lead-generation tool for RMCs and mobility consultancies. Prospects get value; you get a contact.
How to configure. In Licensee console → Embed, copy the iframe snippet.

9. ROI Dashboard

Business-value levers

What it is. Four levers that convert program cost into monetized business value: acceptance-rate lift, retention improvement, time-to-fill reduction, and rejected-offer cost.
Why it matters. Mobility teams get budget cuts because HR can't tie spend to business outcomes. These levers give you a defensible dollar answer for CFOs and CHROs.
How to configure.

- Open ROI Dashboard.
- Adjust each lever to match your assumptions.
- Every input has a tooltip explaining the default and where the rate comes from.

Rejected-offer cost model

What it is. Costs a rejected offer at HR interview hours × loaded hourly rate + hiring-manager time + backfill delay (extra days-to-fill × loaded daily rate) + any signing bonus or agency spend that walks with the candidate.
Why it matters. Makes the invisible cost of a weak relocation package visible. Often the single biggest lever for justifying a stronger program.
How to configure. Adjust defaults on the ROI Dashboard: candidates interviewed (default 5), hours per candidate (~4), loaded hourly rate, and backfill days.

10. RFP Tool

Build an RFP & compare vendor responses

What it is. Create a structured RFP, invite vendors, and enter or import their responses. A comparison view scores each vendor across cost, coverage, and service — including HHG capability (20% of the total score).

Why it matters. Vendor selection is often 'who sent the prettiest PDF'. Structured scoring — including how well the vendor handles your HHG rules — turns it into a defensible decision.
How to configure.

- Open RFP Tool → New RFP.
- Attach the program(s) you're sourcing for so policy requirements auto-populate.
- Send invites and collect responses.
- Review the Comparison view.

AI due diligence

What it is. Firecrawl researches each vendor online (reputation, service scope, litigation, coverage), then an LLM scores them and recommends which vendor to include.
Why it matters. Compresses days of manual vendor research into minutes and surfaces red flags a spreadsheet review misses.
How to configure. On the RFP, click Run AI due diligence. Review the scored recommendation and citations before deciding.

Vendor Docs (RAG)

What it is. Upload a vendor's proposal (PDF or DOCX). RelocationIQ extracts, chunks, and embeds the content so the assistant can retrieve and cite exact vendor + page snippets when you ask questions.
Why it matters. Vendor proposals are 40+ page PDFs no one fully reads. RAG makes them queryable — 'Which vendor has the best storage-in-transit terms?' returns a cited answer in seconds.
How to configure.

- Open the RFP → Vendor Docs panel.
- Upload each vendor's proposal.
- Wait for Ready status.
- Ask the AI assistant a question — it retrieves and cites automatically.

11. Recommendations

Rule-based policy suggestions

What it is. Automated suggestions derived from your current talent plan and scenarios — e.g., 'Your Manager tier has 40% relocating; consider moving from Reimbursement to Core-Flex for a $X/move savings.'
Why it matters. Surfaces optimization opportunities you'd miss reading the same dashboard every quarter.
How to configure. No configuration — recommendations appear automatically as your data changes.

12. AI Assistant

In-app assistant

What it is. A chat widget grounded on your workspace data (talent plan, HHG caps, employees, exceptions) and any Vendor Docs you've uploaded. Cites sources when answering vendor-doc questions and runs a structured money-saving advisory pass on request.

Why it matters. New team members ramp faster; leadership gets answers without opening the app. Ask 'audit my policy' or 'save money' for a prioritized action list with quantified $ impact and the exact route to make each change.
How to configure. Open the assistant from the bottom-right corner. The model is set platform-wide — the best available quality, no per-user picker, no extra cost.

13. Integrations & Public API

Integrations Directory

What it is. A catalog in Settings of common HRIS and payroll systems (Workday, ADP, BambooHR, Rippling, and more) with connect stubs.
Why it matters. Relocation lives at the intersection of HR, payroll, and finance. Integrations mean data flows in and out without CSV imports.
How to configure. Open Settings → Integrations Directory. Click Connect on a system to start the connection flow.

Workspace API keys

What it is. Generate a scoped API key per workspace to authenticate calls from your internal tools or third-party systems.
Why it matters. The safe way to give payroll, BI, or ATS systems programmatic access without sharing user credentials.
How to configure.

- Settings → API Keys → Create key.
- Copy the key immediately — it's shown once.
- Only workspace editors and owners can create or revoke keys.

Public REST endpoints

What it is. Read/write access to core resources at /api/public/v1/*: employees, talent-plan, scenarios, roi.
Why it matters. Push new hires from your ATS as pending relocations; pull ROI numbers into a finance BI dashboard.
How to configure. Send the API key in the Authorization header. See the API Docs page in the app for endpoint schemas.

Webhooks

What it is. Outbound HTTP callbacks fired on relocation events (created, updated, cancelled, exception requested/approved).
Why it matters. Keeps downstream systems (payroll, Slack, ticketing) in sync without polling.
How to configure.

- Settings → Webhooks → Add endpoint.
- Provide a URL and choose the events to subscribe to.
- Rotate the signing secret from the same page.

14. Licensee Console

Reseller / enterprise partner console

What it is. A separate console at /licensee for resellers and enterprise partners: manage client workspaces, capture leads, brand the app, and configure a custom domain.
Why it matters. Lets RMCs, mobility consultancies, and large enterprises offer RelocationIQ under their own brand — with visibility into every client engagement.
How to configure.

- Clients — provision and manage workspaces you sell into.
- Leads — every embedded-calculator submission and CTA click lands here.
- Branding — logo, name, colors applied to every downstream experience.
- Domain — set a custom domain (e.g. mobility.acme.com).
- Notifications — route lead alerts to email or Slack.
- Embed — copy the iframe snippet for the branded tax calculator.

15. Platform Administration

AI model selection

What it is. Platform admins choose the AI model used for exec summaries, Suggest costs, Guided Setup, variants, refine-with-chat, the assistant, and RFP due diligence — applied to every licensee and workspace.
Why it matters. Guarantees every user gets the best available quality and eliminates per-user model-picker confusion. Cost is absorbed at the platform level.
How to configure. Open /platform/ai and pick the model. Change takes effect on the next AI call.

Tax tables

What it is. Centrally managed federal, state, and FICA tax tables used by the Tax Calculator and gross-up engine.
Why it matters. Every workspace stays current without HR chasing tax changes — a compliance win as well as a productivity one.
How to configure. Only platform admins can edit tax tables from /platform/tax-tables.

Broadcasts & licensee management

What it is. Send platform-wide announcements and manage licensee accounts.
Why it matters. Push tax-law updates or major feature releases to every user in one message.
How to configure. Use /platform/broadcasts and /platform/licensees.

16. Why RelocationIQ Wins

Positioning highlights when you're comparing us to spreadsheets, ERP add-ons, or legacy relocation software:

- Guided Setup with industry benchmarks — the fastest path from empty workspace to a defensible talent plan and policy shortlist.
- AI proposal variants and refine-with-chat — three costed plans side-by-side and natural-language iteration, not one recommendation on a take-it-or-leave-it basis.

- Diff + Impact Summary — every AI change is auditable with per-row $ deltas and one-click revert.
- HHG governance built in — weight/$ caps, valuation, excluded items, exceptions with tax impact — not a bolt-on.
- Branded, one-click relocation policy exports (DOCX + PDF) that stay in sync with the plan.
- RAG-backed vendor analysis — upload proposals, ask questions, get cited answers.
- ROI you can defend — acceptance lift, retention, time-to-fill, and a quantified rejected-offer model.
- Open API and webhooks — no vendor lock-in.
- Platform-managed AI — best-in-class models included, no per-user keys, no surprise bills.
- Domestic and international — one tool, one policy library.

17. Glossary

- Gross-up: Extra employer payment to cover the employee's tax on a taxable benefit.
- HHG: Household Goods — everything the van line ships.
- SIT: Storage-in-Transit — temporary storage of HHG between origin and destination.
- Valuation: Insurance coverage on the HHG shipment (full-value replacement vs. released rate).
- RMC: Relocation Management Company — vendor that coordinates the move end-to-end.
- Core-Flex: Program with a fixed core of benefits plus a smaller flex cash allowance.
- VIP: Executive-tier relocation package.
- Lump Sum Check: Flat cash payment to the employee with no vendor coordination.
- Managed Lump Sum: Company-paid vendor services against a per-move cost cap; also called capped lump sum.
- Reimbursement: Employee pays vendors, submits receipts, company reimburses up to caps.
- Loaded rate: Hourly or daily cost of an employee including benefits and overhead — used in ROI math.
- Pinned row: A Talent Plan row marked to be preserved across AI refinements in Guided Setup.
- Guided Setup: The AI wizard at /app/talent-plan-setup that proposes a full talent plan sized to your industry, company size, and budget.