



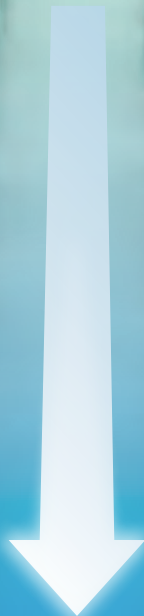
Relocation Playbook 2021

A GUIDE TO GLOBAL TALENT MOBILITY IN A POST-COVID WORLD

April 2021

KEY COLLABORATOR:

TEXTRON



Foreword

Like many organizations around the world, Cartus prioritizes the health and safety of our employees, suppliers, clients, and their relocating employees. At Cartus, our Crisis Management Team continues to monitor the spread of COVID-19, and we are following the guidance of the U.S. Centers for Disease Control and Prevention (CDC), the World Health Organization (WHO), as well as guidance from other government entities worldwide.

In addition to the impact on public health, COVID-19 has significantly affected businesses and economies around the world. The reopening and recovery of individual countries and their respective economies remains uneven. Despite the inherent challenges, business leaders continue to plan for a return to work under a “new normal.” Given that the global pandemic continues to be a part of our lives, we believe it is important to update and review new planning parameters, and refresh talent mobility strategies in order for mobility professionals to emerge stronger from this crisis.

Thank You

This new edition of Cartus’ **“Relocation Playbook”** is the result of our collaboration with clients—exploring their challenges and unique ways of overcoming those issues. Thank you especially to this edition’s Key Collaborator, **Marisa Johnson**, Global HR Manager at **Textron, Inc.** Combining client findings with knowledge from our vast global network, we created this resource which explores new 2021 trends impacting the mobility industry and shares recommended strategies for navigating today’s global environment. As the world continues to evolve, we will continue to update this document, providing a reliable and current resource.

*Special thanks to **Katherine Asperin** and **Jo-Lynn Wee**, our Directors from Global Talent Mobility, who have been important co-creators and facilitators in curating the concepts and discussions in this Playbook.*



Marisa Johnson
Global HR Manager, Textron, Inc.

“This past year has forced us to reimagine almost everything about the world around us and how we function in it. We have been stretched and tested in ways we never dreamed possible. We have relied heavily on our supplier network to do the impossible and help us place critical talent in the right place at the right time. And that same supplier network has helped us fulfill our duty of care to our employees and their families who are thousands of miles away from home. Our ability to truly partner with Cartus has allowed us to successfully navigate these uncharted waters and come out better for it on the other side. This Relocation Playbook provides organizations with the tools to implement their mobility strategies, while continuing to navigate these unprecedented times.”

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DUTY OF CARE STATEMENT

As human resources and mobility professionals, we are well aware of our legally required **duty of care** responsibilities to our employees. However, due to our commitment to Corporate Social Responsibility and ethical practices, we strive to provide our employees with more than the bare minimum duty of care as required by law. In addition to basic safety measures, many leading organizations are focusing on providing a working environment that also supports and nurtures their global workforce.

The importance of this duty is intensified when companies ask their employees to uproot their lives and move to a community where they may not have the support of family or friends. Employers therefore have a greater duty of care responsibility to ensure their employees have a strong support network at their new location.

Writing a Duty of Care Statement or Policy

As employers, we all have a level of responsibility for our employees' wellbeing, which means a Duty of Care statement, or policy, is critical to protecting both the employees and the company itself. When writing a *Duty of Care* statement or policy, one should think of it as an extension of your company values that also covers mobility considerations. Consider the day-to-day responsibilities of your employees, how your employees travel, access facilities, technology concerns, as well as your operating geographies. You should also consider engaging regional stakeholders to help identify country- and location-specific risks. This is especially relevant during a global pandemic.



Karen Wilks

Vice President of Strategic Growth Americas

"As we enter the next stage of the global pandemic with vaccine programs rolling-out around the world, Cartus is looking ahead to the future of global mobility. As companies set new goals and objectives, how we guide and support our clients through this ongoing transformation is critical. Balancing our client's initiatives and meeting the needs of their employees is paramount. Some clients have asked how far should their duty of care extend, and where does the company's role begin and end? In many instances, the lines are somewhat blurred depending on the region, country, and in some cases, state. Due to our exclusive client base, we are in a position to share our Relocation Playbook, which provides industry insights and creative solutions to such challenges, to help you continue to be successful and meet objectives in this dynamic environment."



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Trends and Observations

As COVID-19 vaccines are being administered in many countries around the world, now is the time to ensure your organization prepares for when borders open again. It is difficult to predict precisely how the world will emerge once the pandemic is over, so business leaders need to develop practical solutions for what may become the “new normal.” The world will learn how to respond better to future pandemics, enabling countries and companies to rapidly adapt to changing environments. Since the pandemic began, we have observed changing trends within:

- The global workplace
- Travel
- Talent management
- Digitalization

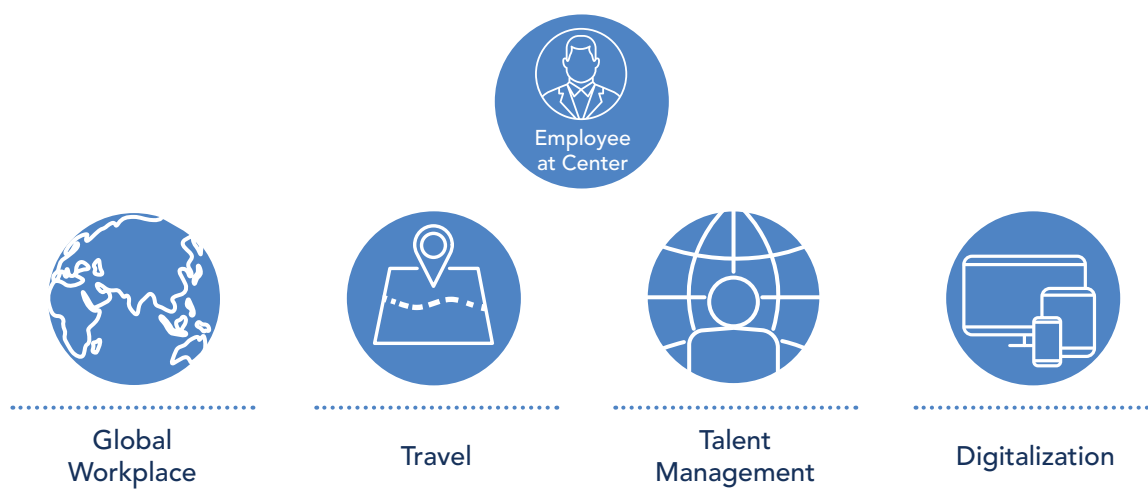


Figure 1 – Identified Trends During Global Pandemic



GLOBAL WORKPLACE

Overarching Goal:

There is a new cultural shift that needs to be considered, and organizations should look at long-term solutions in reimagining their respective global workplace.

Providing a comfortable and safe working environment has been a top focus of organizations. Office facilities will continue to exist, but as we continue to steer through our “new normal” of social distancing, there has been a significant increase in requirements designed to protect those working in existing corporate facilities as well as establishing the proper infrastructure to enable employees to work remotely. This presents new challenges for the workforce, including the need to stay connected wherever they may be.

New Workplace Process

During the early stages of the pandemic, companies were encouraged to engage their facilities, security, IT, HR, and (as appropriate) employee and government relations departments to ensure work arrangement compliance. Most companies by now will have the following steps in place, but we recommend that you review them over the coming months:

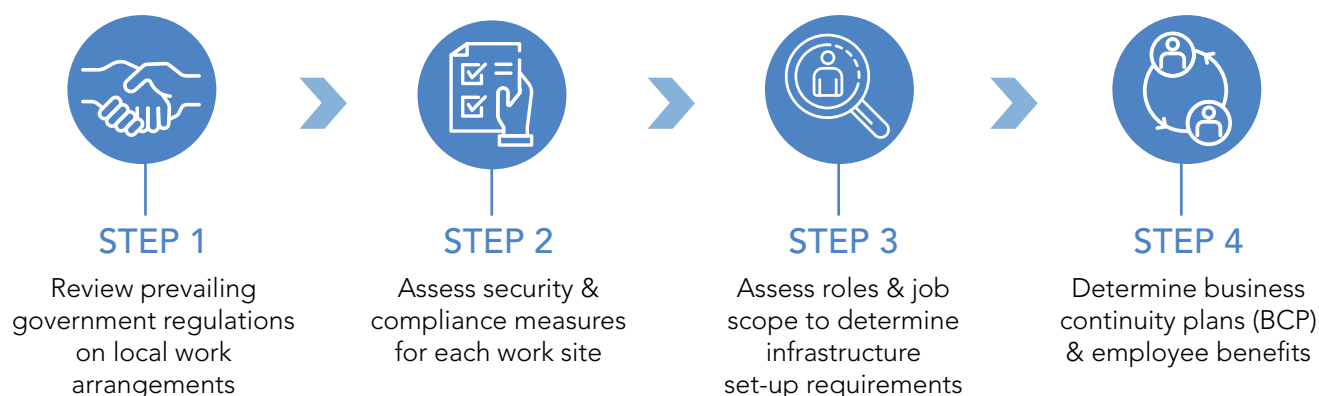


Figure 2 – Workplace Safety and Compliance Review Process

STEP 1 – Review Government Regulations on Work/Office Arrangements

Government relations departments, or the country head of HR, must take note of any restrictions or additional measures for the following aspects:

- Workforce functions deemed essential for operations
- Facility to workforce ratio/capacity
- Health and safety prerequisites to practice employee safety on-site
- Health, travel, and office entry/exit declarations needed for tracking movement
- Sanitation requirements
- Safety and wellness training

STEP 2 – Review and Assess Current Measures for All Work Sites

With the general findings on government mandates as the planning base, both facilities and HR departments must evaluate the different work sites and customize new workplace regulations that support country-specific requirements.

- **Headquarter offices** or traditional workplaces must be reviewed for their capacity, ensuring employees are continuously provided with a safe working environment.
- **Specialized work sites**, such as manufacturing plants, research and development centers, and laboratories, where access is limited to company employees, must continue to adhere to the latest industry standards imposed for operation. All safety operation manuals need to be reviewed to ensure compliance with both government and industry-mandated standards.
- **Workplaces with public access** (e.g., malls, banks, parks) will need to practice both workplace and public function mandates to safe-keep the well-being of employees and public consumers.
- **Remote work** and “work from home” set-ups will need heavier involvement, mainly from the IT department, as companies ensure that the necessary equipment is made available to their employees and privacy/information security controls are in place.

The company will then assess whether the work arrangements are long-term or temporary and determine any return-to-work strategies, if applicable.

STEP 3 – Assess Workforce Requirements and Network Set-up

Once physical worksites have been assessed, HR departments, in collaboration with other relevant stakeholders, should facilitate a review of the different roles and responsibilities to determine the rotation of workforce, assigning the most appropriate workplace and tools to their employees.

A checklist of required fixtures, tools, and network contact requirements must be made available upon onboarding an employee or upon deployment of office equipment. The checklist would typically include the following:

- **Workspace fixtures and accessories** must be customized per worksite. Inclusions: work desk, chairs, secure shelves, pedestals or lockers, laboratory equipment or materials. Accessories, such as protective gear, mobile phones, and ergonomic accessories may also be considered.
- **Company IT tools and programs** needed for performing job duties must be fully set-up and deployed by the IT department to employees. Typically, computers or laptops are made available with the proper security/firewalls in place to ensure that the data of the company is kept safe.
- **Company directory and support hotlines** will also need to be easily accessible to all employees so they know where to get help when they need it. Access to business leaders, department teams, HR, and IT teams are some of the contact details that will need to be available. Emergency helpdesks, ethics hotlines, and employee well-being and support lines are also good support systems that should be made available across all worksites and to all employees.

The employee and company's responsibilities must also be clearly conveyed to the employee. Regardless of the new work arrangements and work locations, it is critical that employees understand and comply with the code of conduct, ethics, and data protection policies. It is recommended that HR revisit the company/employee handbook to ensure that new work arrangements do not compromise these important policies.



Alzone Ang
Vice President,
Global Talent Mobility
APAC

"While Global Mobility is not one of the industries most impacted by COVID-19, our business does depend on a few important elements, such as accessibility to air travel, relatively open borders and global trade, which facilitates the movement of commerce and people. All of these elements have been in short supply recently. This has been a challenging time for us and our clients. Reimagining our industry, where employees and their families feel comfortable relocating to another country safely, has been full of many challenges. By sharing this document, we aim to help you and your company adapt to this new business environment. We are committed to helping our clients and their employees feel supported, whatever the situation may be."

STEP 4 – Consider Employee Benefits and Compensation Policies

If working arrangements were changed for your employee bases, HR must consider best practices in reviewing benefits and compensation components.

- **Non-monetary benefits**, including additional wellness leave and additional components on insurance to cover employees' well-being and mental health, are some of the adjustments companies have made during this time to extend professional support to employees and their families. Wellness programs and remote learning opportunities can also facilitate engagement between a global and remote workforce.
- **Compensation benefits** have been extended by some governments around the world; HR and payroll departments must ensure that the latest benefit structures are captured in their employees' payroll. Additional allowances, reimbursement or otherwise, have also been implemented to cover external workspace costs, additional support for utilities, or purchase of work-related tools/ materials, insurance, or wellness packages.



IT TOOLS

Hardware & software



WORKSPACE

Website security & home office ergonomic needs



HELPDESK

Company contact network



COMPENSATION

Allowances, benefits & reimbursements



BENEFITS

Non-monetary benefits (additional leaves) & insurance



EMPLOYEE HANDBOOK

Ensuring employee responsibility or information security

Figure 3 – Workplace Considerations for Steps 3 and Step 4 of the New Workplace Process

The New Workplace

As soon as the situation stabilizes, companies must envision and prepare for what their “new workplace” will be like. Many companies have explored downsizing physical office spaces as they reassess job roles, the importance of face-to-face interactions, and the need for special equipment or information located at an office or specialized facility. Assessing business needs holistically will drive long-term work arrangements remotely, on-site, or in a blended approach.

For employees or roles that require a physical office space, a return-to-work strategy must be implemented once “new norms” have been established. This strategy must be communicated to all employees to ensure adherence to the new regulatory requirements. Both interim, permanent, and hyper-care measures must be shared transparently and employees will need to be reoriented accordingly to ensure a smooth implementation of return-to-work strategies.

Throughout this section, we have shared some of the best practices for developing and executing a plan for a new workplace in response to a pandemic. When returning to work, consider the following recommended practices implemented by Cartus and our clients:

- **Take note of your office building access and facilities set-up.** This may have been changed in order to comply with prevailing safety guidelines.
- Building entry and exit points, mandatory scans, registrations, temperature checks, and change in access cards are some of the implemented checks to **ensure quick contact and emergency tracing.**
- **Implement your company’s regulations while accessing your own office space,** the maximum occupant capacity, and the facilities set-up of individual workstations/hot-desk stations and common areas to ensure safe-distancing measures are observed. For most companies, there are established split-team work arrangements to ensure business continuity.
- **Staggered working hours** (including lunch breaks) can reduce employee traffic and avoid peak travel periods to protect employee well-being.
- **Tracking the office movement of your employees** and your visitors (if allowed) is also a key initiative to ensure employee safety.
- **Training on new company policies,** processes, protocols, systems, and tools is also necessary to ensure all employees comply with the latest company guidelines. A dedicated resource hub that houses all protocols and documents must be made readily available to all employees.
- Finally, when shifting to a blended approach, many companies have shared **new ways to connect teammates and helpdesks** to address employee needs in the office and remotely.

As part of our overall mission to **Reimagine Work** at Cartus, we reviewed which of our jobs can be performed from home on an ongoing basis, and considered other approaches for maximizing employee health, safety, productivity, and job satisfaction. Many of our clients are currently reimagining their workplaces, too.



Rob Line
Vice President, Global
Talent Mobility
APAC

“A critical stage in evaluating the impact of any crisis is to identify and clearly document all of the touch points in the relocation process. Cartus conducted client forum sessions and utilized the information to develop future-state process recommendations and process map documentation. The rapid outbreak of the coronavirus presents an important opportunity to help us all ready ourselves and improve upon existing crisis management processes, enabling us to be ready for anything the world might throw at us.”

TRAVEL

Overarching Goal:

Be prepared for when borders open and outline a new travel experience in order to form guidelines that balance cost, business needs, and employee safety for business and/or relocation travel.

Post-pandemic travel is expected to evolve as companies evaluate the impact of the pandemic on the experience of their frequent travelers from departure to return. While borders are closed—with individual countries imposing varied and often volatile entry requirements—companies should engage closely with their travel providers to consider the latest travel requirements, costs, and traveler safety coverage for both business and personal needs.

New Travel Considerations

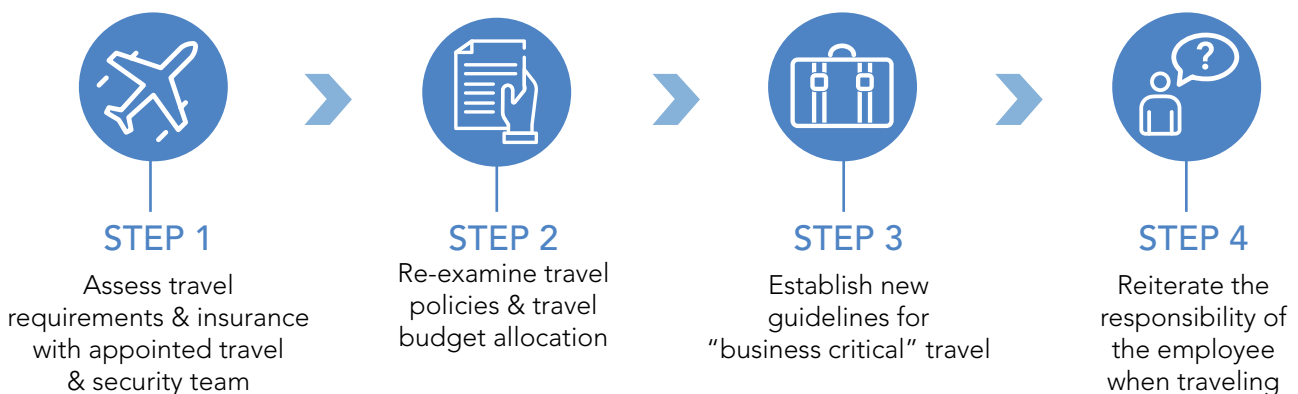


Figure 4 – New Travel Process and Considerations

STEP 1 – Assess Travel Requirements with Respective Security Teams, Travel Teams, or Partner Travel Agencies

An all-encompassing review must be completed by key stakeholders (globally, regionally, and in-country or local jurisdictions) within the travel and security departments.

- The travel help desk/department should provide the most updated requirements for travel and insight on travel routes and costs.
- Any mandatory health check requirements or vaccines must be announced in order for the traveler to take appropriate action.
- Any entry requirements (i.e. quarantine and testing at specific facilities) must be made visible to the business or traveler.
- Security teams at each location must assess and establish a travel traffic light report indicating the risk level.
- Travelers must be made aware of the travel implications and potential liability.

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STEP 2 – Re-examine Travel Policies and Travel Budget Allocation

Travel budgets for at least the first half of 2021 have been reduced or canceled entirely. Travel teams must come up with a recommendation on the travel policies that will be imposed on business travel. Considerations include:

- Revisiting travel class based on the number of hours or the travel risk factor
- Booking flexible tickets that allow last minute changes
- Insurance coverage for emergency or pandemic situations
- Cost to cover quarantine/medical tests required for business travel
- Revisiting contracts/arrangements with any company-procured suppliers (such as hotels and service apartments) to review booking and cancellation terms
- Discouraging all travel to high-risk locations

STEP 3 – Establish New Guidelines for “Critical” Travel

Once global mobility re-emerges as a business priority, it is important to have an updated set of guidelines in place, to streamline how the company ensures its employees’ safety around the world. As stakeholders gather information from their respective service lines, consolidating these requirements is crucial. Considerations include:

- Standard security assessment or travel traffic light concerning employee safety must be provided.
- Business leader (functional leader, regional leader) approval—in both home and host locations—must be obtained prior to booking any travel to mid- and high-level risk areas.
- Approval requests must include cost implications.
- Requests for travel must include the new costs.


	 Business Leaders	 Security Team	 Travel Team
Nature of the Trip (Criticality)	✓		
Travel Safety & Security Assessment		✓	✓
Budget/Cost	✓		i*
Location (& Movement) Security		✓	

Figure 5 – Travel Risk Assessment and Recommended Stakeholders

* Source of information for travel cost estimates

STEP 4 – Reiterate Traveler Responsibilities

Upon receiving clearance for travel, the travel team may proceed with booking the flights. The travel desk must clearly indicate all responsibilities as well as procedures that the traveler will undergo. Along with the tickets, the following information must be sent:

- Any mandatory requirements—such as health declaration forms, vaccinations, and medical exams
- Any additional travel clearance, quarantine guidelines/ references that the traveler may encounter upon departure and arrival
- Emergency contact details for both the sending and receiving locations
- Responsibilities and precautionary measures while traveling during the pandemic

COVID-19 Vaccinations

As vaccination programs are rolled-out around the world, organizations must decide whether it is mandatory for their relocating employees to get a vaccination before they go on assignment. Employee (or family member) refusal may impact your company's health insurance or fail to meet the host country's visa entry requirements.

Additional considerations that may increase relocation costs include whether your assignees will be automatically enrolled in their host country's vaccination program. If they are not, then it could mean an additional cost (or, at least, extra administrative tasks) to ensure they and family members receive the vaccine in a timely manner. Furthermore, with vaccination types differing by country, assignees may want to receive their vaccination in the home country. This could mean an added cost if they travel home to receive it.

Organizations with a large impacted assignee population may want to appoint a medical/health lead to manage these considerations.

Tracing your Employee's Travel Footprint

The global pandemic pressured employees, both locals and assignees, to act quickly in order to determine where their temporary workplace would be when the crisis began to develop. While some employees remained in place, a considerable number arranged for travel to a location they considered "home." On the other side of the spectrum, some found themselves stranded in a third location while on a vacation/business trip as travel bans quickly emerged.



Alex Harris
Vice President, Global
Talent Mobility
EMEA

"Like most global businesses, mobility has faced varied challenges during the global pandemic—closed borders, rapid travel restrictions, and local/national lockdowns have all impacted our client organizations' overall mobility objectives and their employees' relocation journeys. Encouragingly, as we begin to see vaccine programs deployed around the globe, there is cautious optimism that borders may finally begin to open in the coming months. By sharing this Playbook, we aim to offer you guidance on the best way to approach this current landscape, as well as providing coherent strategies to plan proactively for your future mobility needs."

It is important for employers to keep track of their employees' whereabouts to ensure compliance from an immigration and tax perspective. Putting employee safety at the center of travel decisions is critical to determining the best way to move forward. The following are some recommended approaches concerning emergency travel that have been observed in recent months:

- Emergency travel and evacuation plans for foreign employees were centrally managed to guarantee travel and location tracking of assignees. Following the protocol of the assignee's home country embassy was often the default; however, some companies made the decision in advance.
- All assignees who were evacuated from the assignment location have their travels and locations tracked on a regular basis to ensure tax and immigration compliance.
- Booking of evacuation flights were managed centrally through HR or with a relocation management company to enable tracing and proper briefing of travel protocols during an emergency situation.
- Return travel was closely monitored in line with the developing situation at both the home and assignment locations.

The immediate evacuation of foreign talent was carried out for:

- Assignees located in hard-hit areas where facilities were deemed insufficient to accommodate the assignees' medical needs
- High-risk locations where assignees faced dangerous situations
- Assignees whose assignment was about to end—this triggered companies to initiate early repatriations in order to lessen the cost of maintaining benefits that would no longer be utilized in the assignment location

Another possible scenario is when an employee is stranded in a third location (other than his/her home country or country of work/assignment). In this case, the earliest timing for evacuation of the employee is recommended. In the event that travel restrictions affect flights, the HR manager of the employee must quickly get in touch with the company's corporate tax team, security and safety manager, and (in applicable situations) their global mobility specialists to help assess both the tax and immigration risks to which the employee and company may be subjected.

During the first few weeks of the global pandemic, some assignees decided to travel to a third location instead of returning to the home country. Often, they informed their line managers, but not the business' Global Mobility team. Situations like these highlight how important it is for companies to know exactly where their entire assignee population is at all times, as well as how to contact and track them. Leveraging technology—whether in-house or through your relocation provider—to manage remote work and business travel compliance will be more important than ever in this still-fluid environment.

Immediate centralization of travel arrangements for both business-related and personal travel via the company travel desk is highly recommended. This will enable quicker tracing of employees' whereabouts in order to initiate proper conversations with key stakeholders at the earliest possible time. Due to evolving (and often stringent) requirements, it is recommended to declare all travel (regardless of the nature of travel) during this critical time. This measure ensures that employees are thoroughly aware of entry/exit requirements and risks and implications to themselves and to their employer.

TALENT MANAGEMENT

Overarching Goal:

Seamlessly shift focus from business needs to the needs of your employees.

The global pandemic has brought an unprecedented challenge to our personal and professional lives. In the corporate context, it is likely to test the empathy and preparedness of all organizations across the globe in dealing with the unplanned dilemma of balancing employee well-being, productivity, and continuous talent development strategies (that will increase the chance of talent retention). While mobility focuses on strategies centered on the assignee population, we must consider the needs of the local population as well. Ensuring employee equity across your global workforce enables your company to be ahead of the curve and, more than likely, emerge more successful than others.

Understanding the Employee's Journey

As talent mobility professionals, we must start thinking about closing the gap between our local and assignee population to ensure globalization and continuous growth. By understanding each employee's journey with the company, we will be able to map special considerations while dealing with the impact of the COVID-19 crisis.

Onboarding

Whether considering hiring new employees or transferring current employees between departments, functions, or locations, it is important that all employees be given the tools to fully integrate. It is critical to communicate the company's culture, mission, and vision to help employees identify where they fit within the organization and establish their purpose.

The following are some of the key onboarding areas proven to be essential despite the pandemic:

- **Robust onboarding curriculum** to introduce key stakeholders, resources and tools, IT access, needs and network, HR policies, facility/company access, and company culture
- **Onboarding checklists** to ensure the completion of actions or employment registration requirements
- **Welcome packs** to help reestablish the company brand
- **Company calendars** for upcoming company-wide activities
- **Induction sessions** with teams or leaders located in-country or in-region
- **Connecting people to others who can open doors** and explain how to "get things done" in the office
- Consideration of **providing a mentor** (one or two levels above) who can provide career support

These activities are now being conducted through several platforms, either face-to-face or virtually. Ongoing employee engagement practices must be demonstrated in order to continuously retain talent, regardless of work arrangement.

Training: Learning and Development

Employees—both local and assignees—must continuously be given the opportunity for growth and development based on their performance and contribution to the company. During the pandemic, many companies remain committed to engaging their respective learning and development teams to continue with training programs to enhance the employees’ skill sets. Indeed, now is the time to enroll your relocating employees and new hires into training programs to ensure they are fully prepared and ready for their new roles once borders begin to open.

We found that specific training programs have now emerged to address the challenges in adapting to a new working environment:



Figure 6 – Training Focused on Adapting to New Environments

Even before the pandemic, companies were investing more in online training. From huge cost savings—as opposed to expensive face-to-face training—to flexibility, online training grants companies and their employees benefits that were previously unattainable. At Cartus, we are a huge advocate for virtual training, as it offers the opportunity to learn from anywhere in the world. We offer more than 13,000 instructor-led and online courses to our employees. Additionally, we offer virtual cross-cultural and language training to assignees.

Moving forward, in addition to offering employees and their relocating families pandemic-specific online training, companies may want to invest more in virtual learning to improve their employees’ skill sets in a world that increasingly expects more workplace flexibility.

Talent Development and Growth Through Mobility

With COVID vaccinations being rolled-out in many countries around the world, it is expected that borders may begin to open in 2021. The pandemic has not slowed down the importance of mobility assignments as these opportunities provide global growth and influence and as such, organizations should be prepared to support assignments and transfers in the coming months. Talent mobilizations are also paramount in delivering projects and business commitments that were made prior to COVID-19. The pool of talent from which candidates are selected may have dwindled during this time since employees hesitate to relocate while health, safety, and security remain causes for concern. That being said, there are employees who are still willing and eager to relocate. While business demands may not have slowed down, leaders and mobility professionals alike acknowledge that we need to address these complexities and re-imagine our mobility framework:

- **Identification and selection of employees with multi-skilled talents** may be a way forward to address short-term and project-driven moves that span across different functions within the company. A “jack of multiple trades” might be the right type of talent to give you the best ROI as businesses transition from crisis to recovery.
- **Jump-starting assignments at the home location** and providing the support to do so prior to physical relocation. For many of our clients, this was explored for employees who have accepted a new assignment but were unable to move due to travel bans.
- **A mobility risk assessment council** must be established to review tax and immigration implications and compliance for the work arrangements planned for the assignee.
- **Refreshed review of mobility budgets and timelines** to consider additional costs brought about by a limited supply of resources, additional requirements, and longer clearance timelines.
- **Crisis or emergency policies and exceptions** are established to ensure assignees (new moves, ongoing, and repatriations) are given the necessary support to accommodate potential issues associated with relocation. Considerations to ensure each assignee’s safety and equity among employees are the basis of these exceptions and policies. In addition, support for family members must be provided.
- **Assignment goals and mobility assignment ROI** are now being prioritized to ensure assignees are developing a local talent pipeline in their respective assignment locations to ensure business growth and continuity. This also safeguards that moves being executed are critical to the business. Open dialogue about an assignee’s career, skills, ability to meet goals, and future at the company are critical to achieving assignee satisfaction.
- **It is important to consider local HR principles** to ensure the welfare of both the assignee and non-assignee population (local talent). Basic safety and well-being policies must apply to all, regardless of the nature of employment/assignment.



Dalia Begin
Vice President, Global
Talent Mobility
Americas

“As COVID-19 continues to influence the way we work, companies are adjusting to the new business environment and the significant obstacles they face due to the pandemic’s tremendous impact on their companies. We know that strategic mobility priorities remain at the forefront despite the disruption. Business leaders are reshaping their talent strategies to align with the evolving landscape while delicately balancing company objectives, and maneuvering through the pandemic’s financial impact. As we navigate the future of global mobility, we hope our very own Cartus thought leaders and the diverse clients that we serve offer insightful and relevant solutions that help talent mobility managers navigate this crisis and push our industry forward.”

Mobility Policies Reimagined

In order to protect themselves and their employees, companies are rethinking their policies in regards to mobility, falling within the categories of emergency policies, balancing benefits, and virtual assignments.

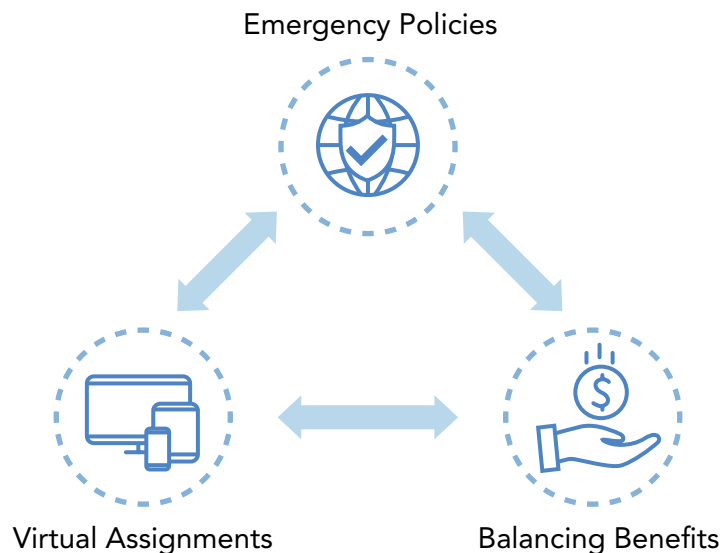


Figure 7 – Reimagining Your Mobility Policies

Emergency or Crisis Mobility Policies

Assessing the right level of mobility support to meet employees' needs and well-being—while meeting businesses' expectations on costs and deliverables—is necessary to ensure equity across a global assignee population. Below are key considerations or trends in which clients have implemented temporary exceptions to provide support and flexibility during the pandemic:

- **Home leave allowance** is typically given to assignees once a year (depending on the length and nature of the assignment) to allow assignees and their families to travel back to their home country within a specific period. During these unprecedented times, consider giving assignees a set allowance or extend the period during which they can use their entitlement (given the nature of travel bans across the world).
- **Hardship allowance** for locations labeled as medium- to high-level security risks are revisited to increase the budget, thus allowing for additional resources in order to manage essential activities in the host or assigned location.
- **Automatic extension of temporary living support** if local conditions do not allow assignees to travel or move into their property.
- **Additional support for quarantine requirement costs**—including medical tests/certifications—and quarantine facility costs (on top of the usual temporary living support) that are mandated by local regulations.
- **Additional shipment service fees** to safeguard shipment and clearance processes during crisis periods.

- **Additional destination services** to manage properties when the assignee has been evacuated from the assignment location.
- **Welcome baskets**, containing immediate and essential daily needs, and emergency kits have also been included upon the assignee's check-in to the temporary living property or permanent home location to help assignees and their families settle in and limit movements during community lockdowns.

Balancing Overcompensated Benefits

Along with employee safety, another priority is reassessing mobility costs for their relevance to the current emergency situation. While extending additional support, mobility professionals also assess the principles of existing policy entitlements to determine whether certain benefits are still appropriate.

For example, the following allowances were suspended for assignees who were evacuated back to their home location:

- Cost of living allowances or per diem
- Hardship premiums and allowances

There have been instances where assignment length has been reassessed prior to the employee's evacuation. For employees whose assignments were about to end, an early termination of the assignment was recommended to avoid unnecessary ongoing costs, such as:

- Housing allowance/support
- Permanent storage at home
- Utilities allowance
- Ongoing property management fees at home (and host location)
- Education support for children



Scott Hunt
Vice President, Global
Talent Mobility
Americas

"We have undoubtedly lived through some of the most challenging times in recent history. One of the key lessons that we in the mobility industry have learned is the importance of always being ready to adapt to change. The ever-evolving landscape that we find ourselves in has placed greater emphasis on the need for agility. COVID-19 has transformed business norms, leading us to reimagine what the traditional workplace looks like. With recommended strategies and best practices, our Relocation Playbook is designed to help you prepare for the future, readying your organization for the next chapter in global mobility. It demonstrates a true collaboration with our clients and highlights the knowledge that we are able to leverage from our global network of relocation experts."

Virtual Assignments

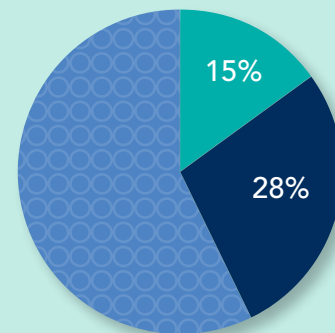
Still a relatively new concept, “Virtual Assignment” is being defined differently by many companies. One definition is allowing employees to remain in their home country while performing their assignment for a host country. Another example is an employee working on assignment in a third country, which is not the home or host location.

Regardless of how “Virtual Assignment” is defined, this new trend may be useful. For instance, at the start of an assignment and while borders are still closed, a Virtual Assignment may be beneficial as it:

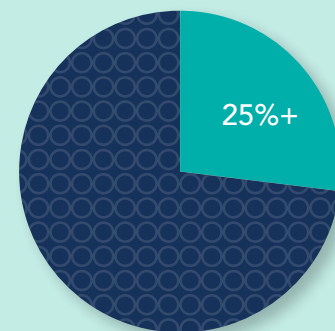
- Prevents the assignment from being delayed if borders remain closed
- Remains a safer option for employees during a pandemic
- Reassures employees planning to relocate with family
- Ensures the work itself can be done

However, there are many aspects that must be reviewed before endorsing this type of assignment for a length of time. The following are key considerations that may help you to determine whether virtual assignments are an appropriate solution for your organization:

- Will virtual assignments be used indefinitely or only until borders re-open?
- Are you reviewing your policy framework? Re-thinking traditional policies and introducing virtual options (remote workers/virtual assignments)
- Will tax, immigration, and employment laws be impacted by the assignee’s location?
- If the assignee is not in the host location, what impact will it have on assignment goals?
- From a cultural perspective, will the assignee be as effective if meetings with colleagues, clients, and customers are done virtually?
- Will the assignee need to travel for shorter, more frequent periods? Will this require tracking?
- Can the assignee develop strong relationships without face-to-face interaction? What are the implications if they cannot?
- Is the assignee’s location robust enough for technology to work effectively?
- If managing a region as part of the assignment, what is compromised if the assignee is unable to meet face-to-face with employees?
- What training is needed to manage a virtual team?
- If certain assignment goals can only be met in-country, will there be a local employee who can support the assignee to meet those goals?



15% of Cartus survey respondents currently use Virtual Assignments. Of those **not** currently using them, 28% are considering doing so on a global basis in the future



More than 25% of Cartus survey respondents reported that they intend to use Virtual Assignments post-COVID-19

Demonstrating Duty of Care through Unique Remote Work Arrangements

Cartus is currently working with several organizations to deliver temporary work arrangements, which allow employees to work outside of their country of employment, typically to spend time with family and friends. At a time when emphasis on a company's duty of care has never been greater, nor more expected, these remote work options ensure employees feel totally supported by their employer.

Relocation Challenge

Due to COVID-19 restrictions, many of our clients' employees were working remotely. This led some to request a temporary relocation to their home country or to an alternative location. The case put forward being that if they were working from home in the host location, they could do the same from their home country—and have the added benefit of spending time with friends and family (local restrictions permitting). Other employees, who were already working remotely in their home country, requested a move to a location where family and friends were based.

Wanting to support their employees during these unprecedented times, our clients were open to this idea, but unsure of how to approach it. What would the tax implications be, for example? Would the moves be compliant? They also did not have the internal resources to manage the number of employee requests they were each receiving and so looked to outsource to Cartus.

Relocation Solution

Working closely with each client, we create a policy and process that meets the needs of the organization and employees. We approach each move request on a case-by-case basis, review whether the individual's job role is suitable for such a move, and assess compliance and immigration risks. Once approved, each move lasts 30 days. Towards the end of that timeframe, Cartus facilitates follow-up actions with the employee to see whether they would like an extension (provided Cartus does not identify any limitations on the employee's role if an extension was approved).

We are also mindful of regional nuances with different cities/countries experiencing varying degrees of restriction. For example, move requests within Europe have been higher than other regions because it has experienced many national lockdowns, so employees there are choosing to return to their home location or to a place where they have family/friends. Local COVID-19 restrictions also mean that employees may be forced to extend their time in the host location—these are managed on a case-by-case basis.

Result

We have worked with several clients to implement these remote work placements around the world. For one particular client, we have facilitated nearly 1,000 moves, with each employee continuing their role remotely and observing the working hours of the employment location. The temporary work arrangement allows employees to be with loved ones at a time when support networks are vitally important for mental health and wellbeing. It also provides them with the opportunity to work in a different environment, perhaps moving from a high-rise apartment to a family home in the country. Above all, employees feel supported by their employer at a time when greater emphasis is being placed on the ways in which organizations demonstrate duty of care and flexibility.

INTRODUCING DISTRIBUTED WORKFORCE SOLUTIONS

Cartus is now able to manage organizations' remote worker and business travel compliance needs through an automated, cloud-based solution. For more information, please contact your Cartus representative or email cartussolutions@cartus.com or visit cartus.com/distributed.

Group Moves

The economic downturn caused by the global pandemic may well increase the number of group moves over the long-term. This is largely as a result of mergers and acquisitions, staff reductions, or workplace consolidation—all typical catalysts for these move-types.

Employee Support Remains Key

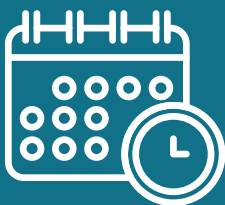
A group move is not a “traditional” relocation. It is normally a permanent move and one that you may have to convince your employees to undertake. Achieving success, therefore, is not only dependent on whether you offer support, but also whether that support is properly tailored to your impacted employees. Do they have a partner that needs new employment? A child with special needs? An elderly relative that they care for? This knowledge is critical and should be gathered through a confidential needs assessment, which allows you to establish relocation policies that make it feasible for families to accept the move.

Group Move Expertise

Policies and processes used for traditional relocations may appear to be sufficient for a group move, but often the outcomes can be counterproductive—even detrimental—to overall objectives. An experienced group move project manager is crucial. They will need to deliver a customized and comprehensive strategy that meets the company’s objectives, provides valuable return on investment, and retains key talent. They must also clearly understand:

- The rationale for the move
- Corporate culture and how it will inform employees’ attitudes
- The projected “go live” date in the new location and how to meet the deadline
- How many employees will be affected

Group moves undoubtedly disrupt an organization’s production, services, and talent, but thoughtful and careful consideration can help minimize that disruption.



55 years’ experience
in managing group moves
of all scopes and sizes



45 group moves
globally in last 4 years—
impacting 15,000+
employees/new hires



We ensure group
move objectives are met:

- Retention
- Attrition
- User experience
- Cost efficiencies

Future-Proofing Mobility Principles and Processes

Ensuring that business continuity plans are in place, relevant, and up-to-date for your mobility processes is critically important. Most businesses have retroactively realized the importance of mobility specialists and the broad view they have on compliance, supplier, and market nuances that may affect normal HR business practices. There is true value in balancing innovation and pragmatism in our duty of care to our employees. Finding a sustainable way forward while maintaining the relevance of our mobility procedures is of utmost importance.

To ensure the “future-fit” of your mobility programs, consider some of the following recommended approaches:

- **Conduct supplier assessments** to ensure services are carried out in a stable and secure manner. In the mobility space, engage your relocation services partner in initial lower case to perform a holistic supplier network assessment across major services like immigration, shipment, and destination services. Review the following aspects:
 - Financial standing
 - Business continuity protocol assessment
 - Security and compliance assessment

While it would be ideal to have a comprehensive assessment of all services in all markets, it is important to prioritize the assessment of key/hub locations and high security risk locations that have a medium to high influx of talent.

- **Consider “back-up” suppliers** to guarantee business continuity and influx of volume. It is expected that—once regulations for the “new norm” have been defined—there will be an increase in demand for services to be delivered. With this in mind, work with your relocation services partner to source a second supplier on the ground to help accommodate the anticipated volume into hub locations.
- **Examine your mobile talent demographics** and assess market feasibility. Not all countries will open their international borders quickly. Varying recovery rates and national policies affect the speed at which international borders are reopened. Mobility specialists must provide market and mobility service insights to the business to enable leaders to reassess their strategy and resource allocation. That way, business leaders can quickly shift delivery location and timing. It would be ideal to have a complete global assessment. At a minimum, prioritize key hub locations and high security risk countries that have medium to high influx of talent.

The COVID-19 pandemic has highlighted the importance of being equally aware of all considerations from both a business and HR operations standpoint. We must assess the effectiveness of our current HR services model for continued success.

For many of our clients, the pandemic has called for a much needed assessment—or transformation—of how business is conducted and how talent is being supported. Mobility generally takes a backseat in formulating business objectives and resource planning. More often than not, mobility teams have been seen as “order takers,” only executing business plans after they have been formulated. The current global crisis requires leaders to be proactive about positive change by guiding mobility teams to actively participate in strategy and resource planning. Through critical considerations, global business leaders can ensure the successful execution of strategies.



DIGITALIZATION

Overarching Goal:

Ensure we support both employee and business needs via an efficient and secure platform.

In an unprecedented time of social isolation, the world remains connected with the help of technology. Work teams are still participating in daily catch-ups via applications such as Zoom, Google Hangouts, and Microsoft Teams. Friends are having virtual “after-work drinks” or “happy hours.” Entertainment, from comedy gigs to festival raves, are being live-streamed and enjoyed from the comfort of our homes.

Social media apps—which were often seen as a frivolous waste of our precious “screen time”—are quickly becoming vital applications to keep us connected to the outside world. Various online platforms enable us to continue enjoying play dates, pub quizzes, live music, and conference calls—all of which allows us to keep calm and carry on throughout this crisis. Simply put, digitalization enables human connection.

Digitalization involves an evolution of tasks and deliverables geared towards a faster, more intuitive end-user experience. The pandemic has accelerated the focus of companies in ensuring stable and secure virtual platforms to connect with anyone across the globe—at a click of a button—to achieve an array of business and personal objectives.

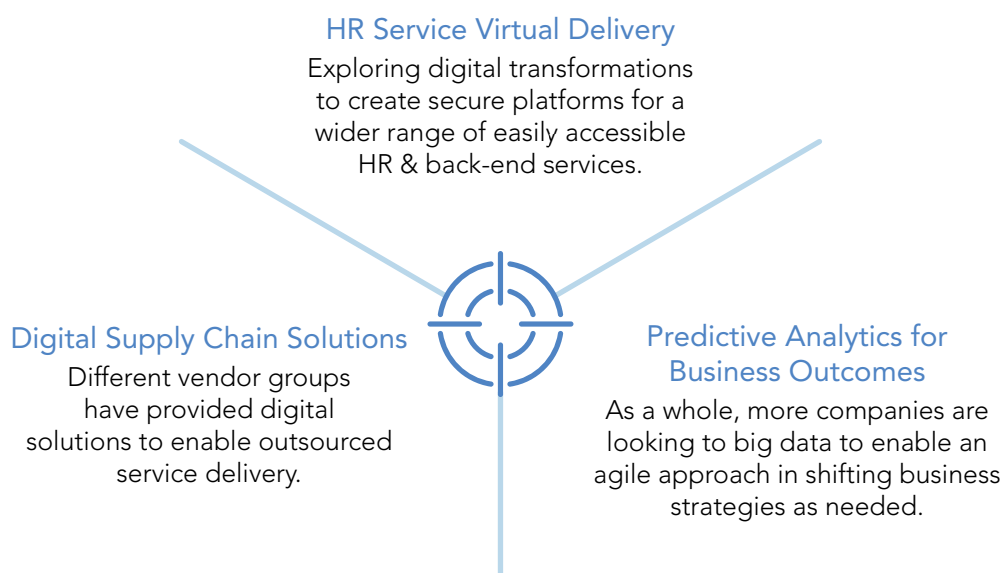


Figure 8 – Digitalization Considerations in the Workplace

Virtual Delivery of HR Services

Prior to the pandemic, many companies had well-established digital communication and collaboration platforms; however, the pandemic has led to the transformation of these existing platforms to help make employee services available anywhere.

Notable e-HR connect initiatives include:

- **HR Mobile applications** that aim at sharing HR policy content and virtual onboarding, for both new and existing employees to access
- **Virtual eLearning platforms** to conduct both internal and external learning and development courses; this involves live and pre-recorded learning and assessment sessions
- **HR BOTs** to provide employees with sufficient clarification on commonly asked HR policy questions
- **Virtual content hubs** that help employees orient themselves on new facility policies and mandates
- **Contactless registration** for workplace entry, hot desk check-ins, facilities booking, and visitor applications
- **Enabling digital signatures** required for document administration

Digitalization Efforts of Supplier Networks

Our partner suppliers have also quickly automated key service deliverables to enable remote mobility services.

- **Our immigration partners** have digitalized worldwide immigration updates live, as they happen, enabling the most updated immigration policy resource.
- **Clients and travel agencies** alike have created digital travel heat maps to help employees and businesses assess travel bans and security levels for different travel routes.
- **Automated travel authorization** upon travel booking ensures necessary approvals are in place prior to booking any flights.
- **Destination service providers and shipment providers** have moved their programs onto virtual platforms, where necessary, to minimize contact points and adhere to local movement restrictions imposed by local governments.
- **Digital area, housing, and school orientations/tours** have been arranged.

What HR Digitalization Looks Like

There is a continuation of the technology assessment needed to support HR services in a rapidly changing environment. However, the overall objective of HR digitalization is a commonly shared one: **to enable holistic business and employee support across borders and functions.** This is exactly what we aim at when we develop technology initiatives. For example, we are currently enhancing our new centralized mobility hub, MovePro360SM, (which is designed to help HR and mobility staff forward-manage their relocation) to also track their employees' whereabouts.

Not only did the pandemic accelerate the course of existing digitalization priorities, but this global-scale crisis has also crystallized the efficiencies that digitalization can offer in the following areas:

1. International and domestic travel management and employee movement tracker to determine compliance to immigration and tax rules
2. Data analytics to facilitate prediction of business outcomes
3. Data analytics in determining assignment success and ROI



CLOSING STATEMENT

It is widely acknowledged that the current global economic downturn is an event-triggered crisis, with COVID-19 dramatically transforming business norms. This has created new trends and cultural shifts in our workplace, pushing many companies to re-imagine work and the idea of the traditional office. Closed borders, quarantine measures, and sudden travel restrictions have thoroughly impacted the experience of our frequent business travelers. The increased duty of care that employees have come to expect from their organizations during a health pandemic has led to a rethinking of talent mobility—a shift in the continuum—from the needs of the business to the needs of its employees. Due to the aforementioned factors, the new work protocols that organizations have adopted require digitalization to be a primary business priority, if not **the** business priority. Ensuring that employees continue to have a secure, safe, and efficient platform to continue their online engagement with stakeholders—internal or external—is the most common feedback from our clients.

Plan, Prepare, and Provide

While it is often said that COVID-19 “took us all by surprise,” we have seen the emergence of major illnesses—such as SARS, H1N1, MERS, and now, COVID-19—within the last 20 years. Health experts have discussed the hypothetical concept of Disease X, a new unknown disease—highly infectious, more mutable, and deadlier than COVID-19—that could cause a future epidemic. While Disease X is a hypothetical concept, businesses should see this as a feasible threat and use lessons from COVID-19 to **plan and prepare**. Part of that planning and preparation entails having the right mindset and a continuous transformation of global mobility and HR services. As mobility professionals, we should always leverage the “wisdom of the crowd” by collaborating across our network of suppliers, fellow industry peers in other companies, and our internal business stakeholders. This will ensure that we always find a way to navigate the post-crisis environment while protecting and improving the experience for our company and employees.



Alex Duhamel
Vice President
Global Talent Mobility
EMEA

“The global pandemic has caused many shifts in the global mobility industry, but arguably, the most significant is the increased focus on duty of care. For employees, their expectations to receive the right level of employer care has become crucial to assignment success. For organizations, the challenge is to achieve the right balance between employee and business needs. The Cartus Relocation Playbook focuses on navigating mobility trends like these, and preparing for when borders open again. It offers best practice recommendations on how to help organizations put measures in place to ensure their relocating employees (and their families) feel safe enough to accept an assignment.”

Want to Learn More?

Visit our [Cartus COVID-19 Content Hub](#) for relocation trends, resources, and the most up-to-date information to help you navigate today’s rapidly evolving mobility landscape.



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APPENDIX I – WORKPLACE SAFETY CHECKLIST SAMPLE

Workplace Assessment		
Objective: Limit access of workplace on an “as needed” basis and ensure proper safety protocols are in place		
Status	Task Detail	Assessment
	Review government mandated regulations on workplace safety and management and access facilities set-up	
	General: Determine current layout, entry/exit points, and maximum capacity of the workplace to follow government-mandated regulations	
	General: Establish workplace sanitation procedures and schedule	
	General: Assess current facilities to determine frequent contact points and establish contactless means, if possible	
	General: Identify Workplace Safety Ambassadors—to audit/monitor fulfillment of new safety regulations	
	General: Provide emergency medical/first aid kits	
	General: Assess current IT tools, IT security framework measures, and machine/equipment safety management	
	Individual workstation: Ensure proper safe-distancing measures are in place (inclusive of desk markings, installation of protective panel shields for close distance office space, availability of disinfectant solution)	
	Common employee space (i.e. pantry, conference rooms): Ensure regular sanitation measures are in place—before and after use—and limit access	
	Public reception area(s): Ensure registration measures are in place for all scheduled and walk-in visitors, implement one-way entry and exit measures; limit visitor movement to limit contact with office staff to an “as needed” basis and ensure proper sanitation measures are in place	
	Communication: Protocols for workplace access for employees and visitors alike must be shared prior to office entry; protocols should outline the responsibilities in safekeeping the office space (i.e. determine needs for masks and when and where to use them)	
Workforce Management		
Objective: Ensure the safety of the workforce when accessing the workplace during the pandemic		
Status	Task Detail	Assessment
	Maintain an employee list that includes basic employee information, contact details, and current jobsite (on-site, in-office, remote blended)	
	Build an emergency communication tree to execute business continuity protocols	
	Assess essential business deliverables that will require workplace access and the workforce needed for business execution	
	Build a “workplace access approval request” process to assess and track workforce movement; this should indicate the period of access and business need	
	Establish proper travel and health declaration forms	
	Establish staggered lunch breaks/use of common areas to control employee access	
	Review current health insurance policies and coverage specific to the pandemic	
	Build an emergency communication tree to execute Business Continuity Guidelines	
	Establish emergency evacuation guidelines in the event of outbreak in the office	
	Provide easy access to safety protocols to employees and visitors	

APPENDIX II – TRAVEL POLICY & SAFETY ASSESSMENT

Assessing Your Travel Policies

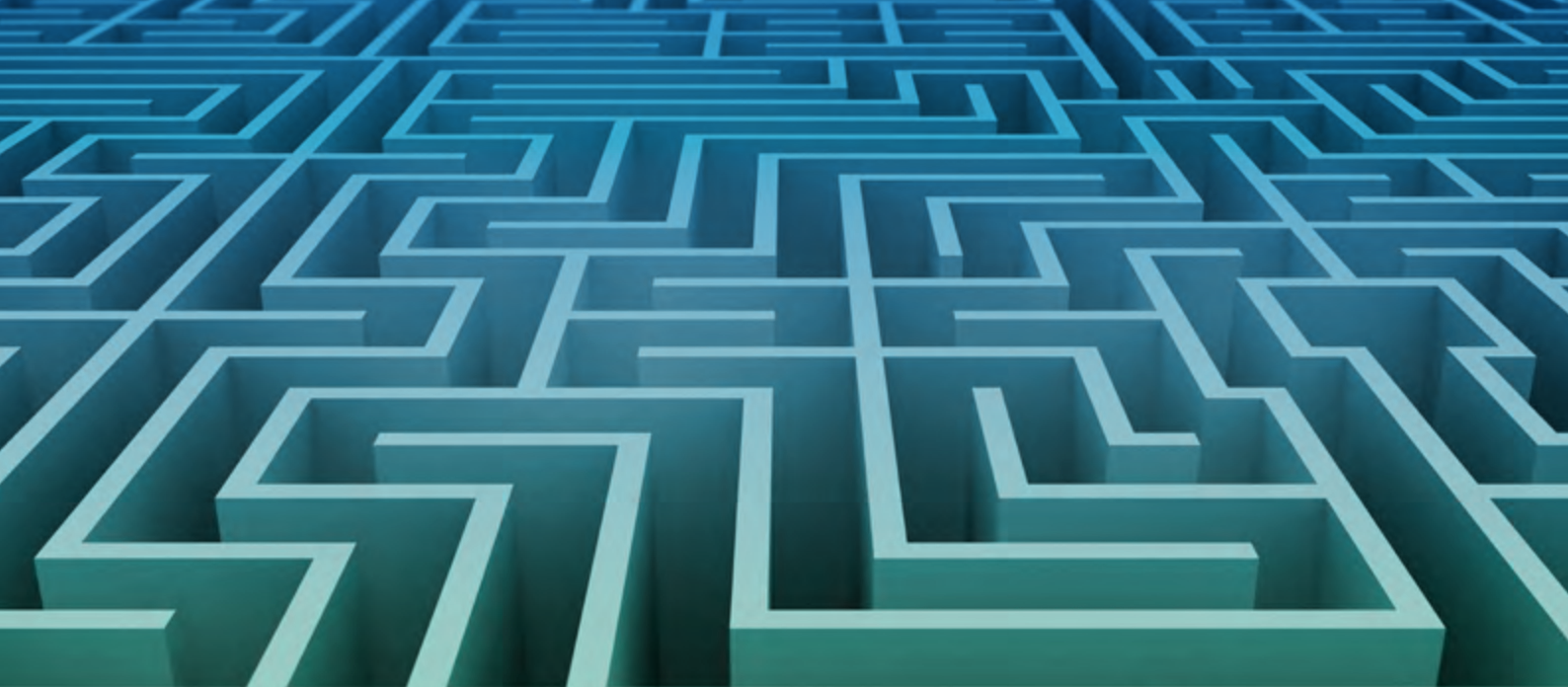
Objective: Ensure proper travel guidelines/policies are in place

Status	Task Detail	Assessment
	Establish travel security “heat map” that employees can access prior to booking any business or relocation travel plans	
	Establish travel approval, travel booking, business visa protocols, and timelines for medium- and high-risk destinations	
	Review travel guidelines (class of travel and traveler insurance coverage)	
	Review travel booking communication process to include the following critical information for the traveler: ticket and hotel details (if applicable), exit requirements in the sending location, entry safety requirements at the destination, travel insurance policy, safety protocols—upon departure, in-flight, and upon arrival—and emergency company contact numbers	

Traveler Checklist

Objective: Ensure travelers’ acceptance and understanding of travel conditions and guidelines

Status	Task Detail	Assessment
	Before taking a flight, assess the exit and entry requirements for the origin and destination location (immigration and health requirements) and plan to obtain all requirements prior to the flight	
	Prepare a travel document pack which includes: <ul style="list-style-type: none"> • Flight tickets • Hotel and ground transportation confirmation • Required visas, medical certificates, and other requirements for entry at the destination location • All required declaration forms • Doctor’s prescription (for medications brought into the country) 	
	Ensure your travel insurance coverage is activated prior to the flight	
	Ensure that you are well-protected and bring with you: <ul style="list-style-type: none"> • Sufficient safety masks/protective gear • Sanitizers • Necessary supply of medicine 	
	Upon entering the destination location, take note of any arrival or quarantine procedures received from the immigration officer and follow their instructions accordingly	
	Alert your HR Manager/Business Manager and other key stakeholders of your arrival	



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