

## transcript

### mobility matters, episode 7: moving the whole person — part two

WITH KAREN WILKS, TREVOR MACOMBER, AND MATTHEW FERRARA



#### karen:

Hello, and welcome to “Mobility Matters.” I’m your host, Karen Wilks, Vice President, Strategic Growth. For today’s episode, we bring you part two of moving the whole person. This is the second half of a conversation I had a few weeks ago with Cartus’ Trevor Macomber, Director of Branding and Communications and our special guest, Matthew Ferrara. Matthew has a degree in philosophy is a photographer, writer, mentor, and a professional speaker. Having spent over 30 years traveling the world and helping people grow their lives and career. Matthew is currently an adviser to organizations in 49 states and 30 countries. He’s led a training company, industry call center, learning portal, and an executive coaching firm. He’s originally from Boston, and now lives in Las Vegas. To learn more about Matthew, please visit [matthewferrara.com](http://matthewferrara.com).

If you missed it, you can find [Part One](#) of this episode by visiting [cartus.com/podcast](http://cartus.com/podcast).

In today’s episode, we pick the conversation up with a look at change management and how to support relocating employees through a major life event like relocation, enjoy!

#### karen:

When we consider the changing priorities of employees, we also need to recognize that many people need help navigating change whether it’s positive or negative, none more so than a relocating family. For our listeners, what are some ways they can help support their relocation population through such a life changing event? We’re

talking here about some practical tips for listeners that they can implement today, tomorrow, or next week?

#### matthew:

Well, I think that when we look at the experience that employees have in a relocation, it’s very similar to other major life changes, graduation from college, maybe getting married, having a first child, sometimes some negative changes too right? They encounter a health challenge or death in the family, we see the very same emotions and same reactions. And so, we don’t have to be psychologists and I just wanted to be clear here, I don’t advocate that we are doing therapy with employees. We have professionals who can do that, should it be needed, but there is a light understanding of navigating change that each one of us can keep in mind.

Essentially, when we’re moving people through a radical change in their lives, there will be four stages that people move through and just keeping an eye out for signs of those stages help us make really simple and practical changes in our behavior, that just make it easier for people to move along that change.

So, the four stages, I’m just gonna give them simple names. The first stage is just the “stage of shock,” or even “shock and denial”. Now that can be both positive and negative, people can be shocked that they have been selected and approved to move. So, it could be a positive shock. Or it could be that their job is moving with the whole division. And it’s

a sort of, “like it or not” circumstance. So that could be the shock and denial of either side of this.

Then there’s the second phase of what we call “anger and bargaining” where people are, they’re really struggling with it, they want to resist or find a way around it or an exception to the rule. The third stage is when people realize that they’re holding on to that anger, and that bargaining activity is not serving them. And so, they sort of reach, what we’ll call a depression, but it’s not a clinical psychological term here. But sort of the depression in the process, the low point where they realize for themselves, you know, I just can’t fight this anymore. I’m either going to have to get with it, or exit and then I don’t want to exit because I love my work. And I love the people I work with, and I love what I do. That’s where they enter the fourth stage, which is a kind of tentative and then excited acceptance, where they start to say, “Wow!” this is actually better than I thought and it works really well and, “Wow!” I’m really thriving. The key here is for the you know, all of us helping someone through these four stages, to change our behavior so that we don’t cause them any more difficulty but also we really apply the right assistance at the right time.

For example, if someone’s in shock and denial, don’t immediately jump into all the planning and stages of process and organizational charts. They’re not ready to hear that, all they really need to hear at that point is something as simple as, “It’s going to be okay, it’s going to be fine, this will work out, we’ve got your back.” So having a response that’s very emotional and personal at that point is more important. And if they’re moving into shock and denial, we just need to put our arm around them, you know, figuratively if you will here, if they’re in the anger and bargaining stage. Again, we don’t need to necessarily try to change their behavior, we just need to reassure them, “When you’re ready, we can show you the plan, when you’re ready, we can talk about the steps that are involved,” still giving them space to kind of get through that process.

And as they move through the change, we change our behavior when they reach that low point where they say, I’m not going to fight City Hall anymore, I’m going to go for it. That’s when we also change our behavior. We don’t have to convince them anymore, that it’s going to get better, we could just step in and say, “Great, let me show you. Let me provide you the training, the knowledge, the systems, the techniques, the tools, the people who will help you do it.”

And then of course, as they start doing it, and it’s working well, we change our behavior one more time, and we move into the cheerleader role. We’re encouraging, celebrating, calling out all the good things that are happening for them and with them. So, the real key to helping people move through change is for us to be observant, try to estimate the phase that they’re in, and then to change our behavior from, you know, assurance and reassurance to planning and practical progress, and techniques to celebration at the very end. And the better we get at that, the easier it will be to help anybody at any phase of the change, continue to keep moving forward. That’s all we’re after, at their own pace, helping them keep moving forward.

#### karen:

It certainly echoes what we’ve been saying throughout the call about adaptability and versatility. And really meeting that person where they are, regardless of whatever stage they’re in is how we adapt to support them. And let them understand that someone cares, regardless of whatever they’re feeling.

#### trevor:

And Karen, you said it right off the bat and Matthew emphasized that the positive or negative initial reaction is not necessarily relevant to how someone manages this change curve. Because even though this is the classic [Kubler Ross model](#), which actually comes on the heels of a grief event, it can just as readily be applied to someone who’s been given the most amazing opportunity of their life, and it will improve things immeasurably for them and their family, if they take it. And yet, they will still have to go through all four of these stages to different degrees, perhaps much more shallowly or quickly than someone who has experienced a more traumatic version. But either way, as Matthew said, the positivity of the shock that that positive valence compared to the negative one, people still need to adjust and the denial may be, “Why would someone like me be given this opportunity?” and so they overcome that stage. And then they may not be angry about the opportunity, but they could be very much afraid of, “Okay, I’ve been very successful right here where I am.”

But can I replicate or improve upon the success in a new location, especially when I'm worried about figuring out how to live my life there and make sure my family is safe and protected and thrives and not just focused on my career." So, you still have that stage two there.

And then the depression and acceptance, no matter how exciting an opportunity, you're also leaving something behind, something on the table in order to take that opportunity, whether it's other family or friends or coworkers or just your favorite pizza place. So, and then finally, the commitment and the celebration, you know, everyone is back and hopefully, above and beyond where they were before they accepted the move eventually. And so I think it might be easy for a Selection or Receiving Manager to discount when someone is given what they would consider a positive opportunity, a promotion or a lateral move into an area they're more excited about whether the geographic area or the career area, and perhaps offer them less support, even unconsciously so and be focused on the person who say, has to move in order to keep their job because the manufacturing center is changing, or because the business direction has changed. But I think that person who has the so-called positive opportunity of which, you know, hopefully most of our relocations are, still needs as much support. And that's why, as Matthew said, having a little bit of this armchair psychology in your back pocket, you can start to recognize, "oh, this person seems to be in this stage. And let me make sure that I'm tailoring the support, the conversation, the emotional support that we're providing to what they need right now.

### matthew:

And, you know, if I could just add in here, think about how everything we've already talked about, now starts to thread together. We recognize that someone isn't just moving, they're evolving, they're growing, we take a pride in being the person who is their guide, through this process, that special role to help them navigate the ups and downs of the change curve. We do some, you know, versatile relationship management and change management with them, making sure that they can go through all the normal human reactions to change, and know that they've got an advocate right there for them along the whole way. And then ultimately, we can celebrate an effective relocation and we can watch their growth, we can watch their achievement of that next version of themselves and their family. And continue to make an investment in that relationship. That's so important. Because it's not only

about getting people to relocate, it's getting people to stay relocated, that also matters in the long run.

### karen:

I totally agree. I think the key point that you hit on Trevor is, when an organization offers someone a promotional opportunity, it's viewed by the organization as very positive. But when we talk about moving the whole person, their family may not view that move as positive. So, to your point, if their employer steps back and is thinking, "This is a great opportunity, they don't need as much support," it could be the direct opposite, because they need even more support to get the family on board, and to really support them where they are, regardless of the stage.

### trevor:

Yeah, absolutely. And, you know, we should say that we will do our best when this is published to produce as many of the resources and reference materials that we talked about on this episode with the accompanying podcast.

### karen:

Indeed. Now let's move on to relationship building, which is essential to achieving a positive employee experience. Matthew, I know you've spoken previously about the relationship banking model, perhaps you can share how it works with our listeners.

### matthew:

Of course, the relationship banking model is something I learned many years ago from, from my mentor as a simple way to make important deposits into relationships, and shift my thinking away from simply having a functional responsibility to having a long-term investment in the success of the person that I'm in a relationship with. So, we know that service matters, we know that doing our job well matters. And we know that we have the systems and the tools and the processes and the experience, and network to be able to live up to all of those criteria for a successful quote unquote, "experience." But there's so much more going on here. Because ultimately, we're talking about a relationship that is going to put their trust on the line with us and say, "Okay, I'm going to go with this relocation and so a lot of trust will be at stake." And so what we want to be able to do is make sure that there's enough deposit if you will, to be able to live up to and have a positive return, you see all these investment terminology, this investment theme, if you will, essentially relationship banking, as a sort of mental model is about knowing the person very

well in to two aspects, not only their professional ability, so certainly we're going to know them as an employee, their talents, their capabilities, their responsibilities, and be very keyed into that aspect of them but almost flipping over to the other side and learning as much as possible and as appropriate about their personal life.

So, what do they love to do? What did they study in school? Where would we find them on a day off? What types of music or entertainment or travel do they like to do now? These are things that, sure we learn over time about people but doing it intentionally, we can actually have a kind of mini-database, if you will, an actual list of both personal and professional aspects/components into which we can make deposits. And this is really important because we're certainly going to make some deposits on the way towards a candidate opting-in for a relocation, but at the same time, as we're relocating, and we want to think about, "How can I sure up this relationship just a little bit? How can I add a little something?" Well, sometimes we can, you know, easily talk about adding some value to their professional side, "Oh, you know what I'm going to suggest a book, or a technique or a tool or something that works in their career." But how cool would it also be to know that this particular person has an affinity for certain kinds of music or art, entertainment, food, whatever it is, and find some small token, some small way to connect, even if it's not a monetary gift, even though it's not something you can give, it could just even be the way that you have a conversation, having the knowledge of these things that really mattered to them, really push their buttons. You're just having a better conversation, which is a kind of investment in the relationship, not only will this strengthen the relationship, but I think it's important to realize, if something does go wrong in the process, if there's a hurdle, a challenge, unexpected or something that we, you know, have to compromise on, because we are consistently making small, but very, very personal investments in the relationship, we will build up some credit.

And so that over time, should something occur in which we have to ask for a withdrawal ask for some sort of compromise, well, that credit has really been built up a lot more than just simply saying, well, you know, where we've been really getting all the work done of the relocation, no, we've been getting the work of the relationship as strong as possible so that we can weather the storm if necessary. There's enough credit to make some minor withdrawals from time to time. So that's sort of the mental model. But you can see there's so many ramifications and so many ways to play the relationship banking model out, that ultimately comes down to the fact that we're investing in people, both sides of that person. And we are very, very interested in the return, the growth of them personally and professionally.

#### karen:

Yeah, I love that doing it intentionally, that resonates for sure the importance of really being tuned into your assignee population, both as individuals is very critical to the success of the assignment, right? On a personal level, as well as the professional level. We know companies make a huge investment sending someone out an assignment, and they want to realize that return on their investment, but the employee is also making a huge investment as well, uprooting their families. Having that sense of belonging, that feeling of being cared for is imperative to the success of that assignment and strengthening that relationship. So, to your point, Matthew, when you need to withdraw from the bank, you have that equity built up.

#### trevor:

And I think the idea of relationship banking might be one anecdote to the, you know, the 18 month or so trend of "quiet quitting," that seems to be cropping up in every headline you see on LinkedIn these days, where employees are basically only doing what's expected of them. In that, the bare minimum, in other words, to not get fired, but nothing more, certainly not above and beyond and you know, younger generations, as much as anyone. And so, if you're invested in this in your employees, as people as the whole person who you are moving, then I think that is a really strong way to ensure that at least within your organization, or within your team, that quiet quitting does not become endemic. There's a quote that comes to mind attributed to Peter Drucker commonly that says, "Culture eats strategy for breakfast." Matthew taught me that many months ago and the idea being that you can have the most perfect mobility policy in

place and have the supply chain you need in all of the countries where your employees are moving, and you can check all the boxes and have the perfectly built conveyor belt to steal our earlier metaphor. But if you are not a company that is a place where this employee wants to be and a company is nothing but the people in it, that culture, then it doesn't matter how perfect your process.

So your relocation management company or their supply chain or technology is that collective culture. And often, when you're bringing in an RMC, they are becoming a part of your culture as well. That's what it means that if culture is eating strategy for breakfast, because the one overrides the other, every time and fundamentally as human beings, everyone wants to feel like someone cares. And that brings to mind the Four Needs that you've talked about before, Matthew, that I'd love you to expand upon.

### matthew:

Sure. And because I think I love where you went with that, in the sense of the importance of culture, you know, investors invest, not just to store capital somewhere, they want that investment to turn into something a great project, a great something. Well, when we invest in relationships, what are we trying to create? Great culture. We're really trying to create an organization that is worthwhile for people to be at, for customers to engage with and for people's lives to evolve around. And when you think about that, in relationship to "quiet quitting," one of the challenges that we have is to really ask ourselves, who can do the most to help resolve quiet quitting, and this is not about blame or responsibility, it's not whether the employee is right or wrong, or the manager is right or wrong. But in my mind, I think that we're all leaders, right? We don't need to necessarily have the sign on the door and the corner office. So which leaders can do the most, I think those are the ones who have accepted the opportunity to curate the culture. And the best way to curate the culture, by investing in people, is to make sure that you invest in the real need that individuals have.

And, you know, most individuals, when you boil it down, there's just four areas where they need a little bit of investment, a little bit of filling of the bucket, from time to time. And those four areas, traditionally, we think of them as, first of all a sense of importance. People, they want to know that they matter, they want to know that, you know, they are important to the organization, they're important to their colleagues, and that they are a significant component in the relationship,

whether it's the relationship just to their boss, or a larger relationship in hand. And so when we are investing in relationships, and having opportunities through relocation to build up this person, let's not forget to reinforce the significance of that person to the organization, but also to me personally, as their manager in some way.

They also want to have a sense of pride in the relationship, people want to be able to say, I did take this relocation and I'm very proud of it, I did volunteer to make change, and be the person who could lead a new team or explore a new market or whatever that was involved in it. I think that not only is an antidote to quiet quitting, because it's exciting and energetic but pride is a primary component to people's work, people love to be able to talk with some esteem, about their work to their family members and their friends around the Thanksgiving table, in a social gathering. So pride is also an important fundamental need. And from time to time, we need to top that up a little bit and make sure that people are proud to be in a relationship with our organization. And to be proud of the effort that they made in their relocation.

The third of the of the Four Needs Model is for people to have a sense of certainty, that they're better off having done this than not having done it, it doesn't mean everything has to be perfect, or that we have to be omniscient in helping them do it. But by and large on balance, they want to be able to say you know what, I'm better off being in this relationship being with this organization, being with these people around me, whether they're my boss, my colleague, that really doesn't matter, I'm just better off with them than without them. And because I am receiving investments, I'm receiving reinforcement, and nurturing of my relationship that makes me more certain that I would be better off here than anywhere else. And so that's a critical component.

And lastly, what people need to have is a sense of control. And I don't mean control, meaning that they can direct everything and manage every decision and manipulate the process. The real operative word is the code in the beginning of it. It's really co-control in the sense of we're doing this together. My relocation isn't something that's happening to me, it's happening with me and meeting new people trying new tasks, having new assignments isn't something that's happening beyond my power, it's happening within my power. And as we build the relationship, or just reinforce it, from time to time, we want to make sure that we stress the fact that

we're doing this together, that we're not just checking off everything in the process, and then saying, Good luck! Enjoy the results." We're there before, during, and after, because what we're doing is, we're actually investing in the relationship, we're not just investing in the process or the system. The people, ultimately are the final product, if you will, of all of these investments. So those Four Needs are just things that we can always just top up the buckets on, as we are working with people making sure we reassure them that they matter. Reassure them that they should be proud to be in relationship with us that they're better off with us than without us, you know, they have a sense of that. And they're very excited for that. And last but not least, that what's happening is happening together, not happening to them.

**karen:**

So, we're coming to the end of this episode, which leads me to ask what has been your "Wow! Factor?" And listeners, by that what we mean, what has been a key takeaway from this discussion that will really help you in your day-to-day roles. Trevor, I'll start with you.

**trevor:**

I really want to double click on the relationship banking, and in particular, the tactical application of what Matthew talked about. There's a few metaphors or variations on it, there's this idea of the baseball card, where if you have one side of the card devoted to someone's professional statistics, but then you know what projects they've accomplished if scores or metrics are part of their day to day, you could have a very high-level overview of who they are in the workplace. But then on the back of this metaphorical card, that's where you start to list some of the personal attributes of their life. Outside of work or integrated with work, you know, whether it's who their partner is, the names and ages of their children, when they started with your company, their birthday, you know, some of their favorites, like Matthew talked about.

And so just again, this idea of the whole person, a baseball card, you can picture flipping it around and around in a rotational way to really cover the whole person. And the way I've been trying to do this, it's not as consistent as I want it to be yet. But I started a spreadsheet, not long after I learned this concept from Matthew. And the spreadsheet literally has my team's names across the top. And down the left side, it has a bunch of different categories, like some of the ones I just mentioned. And as we have conversations, and I'm not trying to be, you know, transactional or robotic about it, or awkwardly introduce some of these, so I can just build out my spreadsheet. But basically, as we have conversations, and things come up, I tried to remember to pop open my spreadsheet in the morning, and keep it open all day. And as I'm talking to people, if something new comes up, I throw it in there, I have a little line for so called latest news. So, let's say, you know, someone's had an illness in the family or their kid is starting a new camp, or, you know, they are traveling somewhere new, I put that in there. Because in your head, you think you're going to remember to circle back to it with them. But you talk to so many people every day that that's not always the case. But next time we have that conversation, I can say, "Oh, how is your mom doing?" Or, "How did your son like their first swim class?" Or, "How was that trip to the Carolinas that you've been looking forward to?" And, you know, it might not be quite as organic as someone who just perfectly remembers that every time, but for me, I found it just really helpful. And making sure like Matthew said, you're making those little deposits day after day, even if you know, I'm still trying to make it a habit so far. And you know, whether you're using the spreadsheet, you could use slides where each person you want in your relationship bank as their own slide with, you know, photos, perhaps from their life as well, or however you organize the so-called stats of their personal baseball card. That's just a takeaway that I've been trying to integrate for a while now.

**karen:**

That's great, Trevor. And I would definitely add to that, and I like the fact that you're doing it intentionally because sometimes when you do it intentionally, then it becomes organically over a period of time. People fundamentally want to know that they matter. People want to know that you care. So, once you're tuned in to your employee population as individuals, to your point, the baseball cards, you're getting to know them, not only on a personal level, not only on a professional level, but on a personal level, you're getting to know the whole person. And



you can make adjustments as you go. Because as we all know, people evolve, but you're then building equity with that person, and they're doing the same with you as well. So, I think that's a great practical application to this relationship banking model. And Matthew, I'll turn it over to you to hear your "WOW!" moment.

**matthew:**

I absolutely love what the both of you have just added. And I would just say that when I think back on this whole conversation, for me, it boils down to a concept that I've tried to live by for a very long time, which is, most people, they want our presence more than they want our presents. And it sounds like the same word there. But it's not right. So, when you think about it, most people want our presence, they want us to be involved in their lives more than they want our presents as in little gifts, or little things. And sometimes, I think we may accidentally overly rely on those little gifts. We can upgrade their flight or we can send them a pizza when they move in or little gifts, if you will. I'm not saying that those aren't nice, and those don't matter. But what really matters, what's really valuable is for that person to know, before, during, and now forever after you will be present in their life, you're investing in them you care, you're helping them navigate change, which never really ends. You had the opportunity to be their guide, as they have taken a big and important step forward to the next version of themselves. I think that's the great gift of the business that we're in and I think is a wonderful reward that goes far beyond the metrics of how many? How many, you know, transactions, how many units? How many relocations have we effectively done? That's the one note card that comes in the mail that just says, "Thank you for being there for me all along the way." And not, "I'm glad we were friends." But "I'm glad we will be friends forever." So, give people your presence. And you won't have to rely so much on giving them presents.

**karen:**

Well, thank you, Matthew, You gave us both today. And we will take it gladly. Thank you both for being here today. This was a great discussion, and I'm sure our listeners will leave with a lot of valuable takeaways. I certainly know I did.

**trevor:**

Yeah, super fun. Karen, I definitely learned a lot more even beyond all the conversations Matthew and I have already had and we probably should have caveated that Matthew and I share a philosophy background. So, if we got a little long winded here are there well, there's your origin story. But Matthew, I'll give it to you to close this out.

**matthew:**

Well, thanks so much for having me. I mean, I really enjoyed this conversation. And I'm very excited that this is something you and Cartus are actually focused on. These kinds of conversations and issues are critical to the work that we do. So, I appreciate being involved.

**karen:**

Thank you both and listeners, thank you for joining us today, be sure to subscribe to "Mobility Matters" through your favorite podcast streaming platform. And until next time, thank you and take care.

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