CARTUS®

MOBILITYINSIGHTS

Information from Cartus on Relocation and International Assignment Trends and Practices

Cartus
FLEXIBLE
MOBILITY
Series

Flexible Mobility:
Choosing the Direction of Change

Flexible solutions continue to grab attention in the field of mobility as a way to meet a number of business objectives, including cost effectiveness, improved user experience, and supporting greater diversity among their assignee population.

In the first white paper published in our Flexible Mobility series, Demystifying Flexible Mobility, we tackled the myriad of flexible mobility terms and definitions and provided a starting point for those organizations considering moving towards a more flexible model for their mobility program.

We have included a short survey on page two that we invite you to complete. Using the information you provide, Cartus will send you bespoke guidance that suits your mobility needs including in-depth recommendations around how to change your current relocation policy, empowering you to move towards a more flexible approach.

Once an appetite for change is established, many mobility leaders face the more challenging aspect of deciding *how* to change. A poorly devised, implemented, or managed flexible mobility program can create more problems than it solves and raises a number of questions:

Which employee populations can be converted to a flexible mobility policy?
Who should control flexible choices?
Does a lump sum option meet my organization's duty of care?
Which methods are most tax efficient?
What relocation services is my organization providing today?
What are the average mobility costs today?
What are current move-type splits? What is the volume by location?
What is the user sentiment today? What services are utilized?
What does the employee interface look like? Will reporting need to be changed?
Choices valued in points or currency? If points, what is the currency base? How much currency is a point worth? How many points should a budget be divided into? How to manage regional variables?
Is country specific core support a manageable option?
Is the intent to offer less, the same, more services?
Which services have fixed costs? Which services vary in cost and to what degree?
How are family structures treated equally, ensuring neither an advantage nor penalty for having children or pets? Managed services or reimbursable expenses? Which variables drive budgets?
Tiers by job level? Increases influence by family size?
How will exception requests be handled? Will exception requests still exist?
Do we need to think about Federal Acquisition Regulation compliance?
How many differential budget combinations apply? Should cash-out options be made available? At what rate should cash-out options apply? How are services divided for opportunities to increase or decrease support?
Are there any considerations for ongoing compensation? If so what limitations are in place?
Are repatriation moves treated as separate or connected?
How are exchange rates considered?
What are the hyper-care considerations after the "go-live" date? What are the success markers? Do provider service level agreements need to change?
How are spend forecasts impacted? Will supplier fees change?
Should you introduce periodic budget reviews? How should data be reviewed? Who is data reviewed by?

STOP!

All of these questions (and more) will have a place in the finer points of an organization's policy design. However, many transformative projects may be hindered or halted by the sheer volume of questions, data requirements, and "what if" scenarios, which are often more easily asked than answered.

Prioritize your key objectives and business needs and allow your approach to evolve from base philosophy to a precisely engineered final version.

WHAT ARE YOUR BUSINESS PRIORITIES?

Ask most children (or adults) if they'd like pizza, fries, or ice cream, and the response will most likely be "Yes, please!" versus settling for a single indulgence. The same can be true of your business when offered cost savings, improved employee satisfaction, simplicity, and a rapid transformation process. Properly designed, many of these options need not be mutually exclusive, however dedicating thought to your business priorities and their order of importance will help answer any policy design questions.

When considering a policy re-design, rank the following from 1 to 8 in terms of your organization's business priorities:
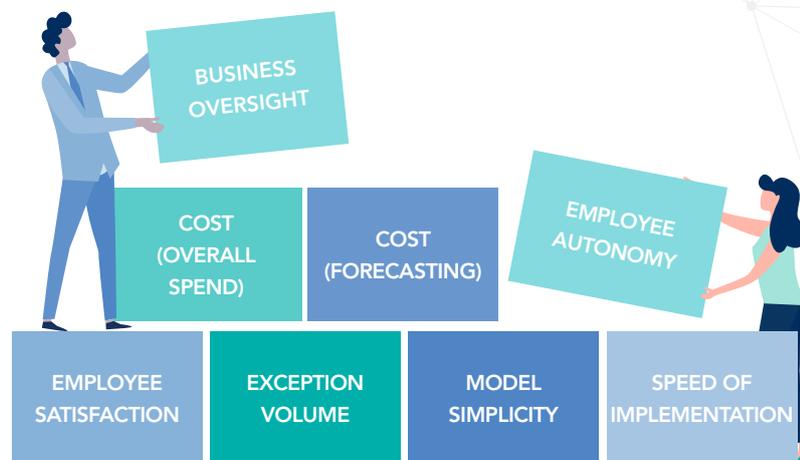
If a decision supports one priority at the expense of another, ranking your absolute priorities in this way can speed up decision making during the policy design process. It can also provide initial guidance on the type of flexible policy that is most suited to your organization.

FINDING YOUR FIT

Cartus has been supporting a number of client organizations with flexible mobility since this policy-type was first introduced. In collaboration with our partners, Cartus designs and delivers a number of relocation policy models, from lump sum to fully fledged core/flex programs. (Read our most recent Flexible Mobility series white paper, Nike and Cartus: A Core/Flex Collaboration.)

However you manage your relocation program today, Cartus' team of in-house experts would be delighted to speak with you and offer suggestions and insights on the potential of flexible mobility within your relocation program, including the methods that would be most aligned with your business priorities and unique values and challenges.

INFORMATION GATHERING

With some initial direction on the structure of a revised mobility program, the next key action to enable a more detail-oriented portion of design is to prepare data. Whether managing internally or with the support of a relocation services provider like Cartus, having access to in-depth data will help to create your policy and test its robustness. As a best practise, the following is the most crucial data to support meaningful policy design:

The Essentials

Cost data: Understanding current spend by the type of relocation support an organization offers its employees. This is crucial in testing future budget aspirations and quantifying the impact of change.

TAKE OUR SURVEY!

Answer 5 simple questions and receive in-depth recommendations around how to change your current relocation policy. By using the data you provide in the survey, Cartus will send you bespoke guidance that suits your mobility needs, empowering you to move towards a more flexible approach.

Volume data: Capturing who an organization is sending, where they are sending them from and to, for how long, and under what circumstances. This data helps to ensure revised support is meaningful and serves the entire employee population while empowering impact forecasting.

Added Value

Sentiment data: Overall feedback on program satisfaction provides a solid base to measure the impact of change. More specific or specialized data such as the satisfaction scores that individual service lines receive or quantified Net Promoter Score data from verbatim comments can provide additional input without the need to create specific employee surveys.

Exceptions data: Understanding where a population seeks additional support is a useful tool when considering policy inclusions. This data point is another reliable baseline observation to ascertain the probable exceptions that a policy change may drive.

Utilization data: For those switching from a more traditional, defined policy approach this may be an additional area of interest. Understanding how employees engage with services offered to them under an existing model may provide insights into services that may be important to them in the future. As with other data points this can provide a crucial "before" picture to refer back to after a new model has been implemented.

MISSING DATA?

Cartus understands that this type of data is not always simple to gather, which is why we are happy to share ours. With our decades of industry experience, Cartus can leverage the data from millions of previous moves traveling into and out of over 185 countries.

This wealth of data, combined with the expertise of our consulting group and the breadth of our supply chain, gives us the ability to support you in modeling a revised program with the data and experience of our broad client base.

Thinking of starting your policy design journey? Contact us today at cartussolutions@cartus.com.

FIND OUT MORE

Read the other **white papers** in Cartus' Flexible Mobility series and be the first to read future publications.

TAKE OUR SURVEY!

DON'T FORGET!
Answer 5 simple questions and receive in-depth recommendations around how to change your current relocation policy.

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