

transcript

mobility matters, episode 5: moving the whole person — part one

WITH KAREN WILKS, TREVOR MACOMBER, AND MATTHEW FERRARA



Karen:

Hello, and welcome to today's episode of mobility matters. I'm your host Karen Wilks, Vice President of Strategic Growth. And on today's episode, "Moving the Whole Person," we're going to be looking at the practical and tactical ways you can strengthen your engagement with relocating employees, including relationship building and change management.

My co-host for this episode is our very own Trevor Macomber, Director, Branding and Communications for Cartus. And when it comes to employee engagement, Trevor is a true advocate. And I have to say a bit of an expert. And we're so excited to be joined today by the hugely knowledgeable and very engaging Matthew Ferrara. Matthew has a degree in philosophy is a photographer, writer, mentor, and professional speaker, having spent over 30 years traveling the world helping people to grow their lives and careers.

Matthew is currently an adviser to organizations in 49 states and 30 countries. He has 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 www.matthewferrara.com. Welcome both.

Trevor:

Thank you, Karen. We are super excited to be here. And I don't know if I'm an expert, but I will definitely take advocate.

Matthew:

And Thanks, Karen, I appreciate being invited.

Karen:

So, let's jump right in. The overall theme for season two of [Mobility Matters](#) is "optimizing the employee experience." To unpack a bit from your lens, Matthew, let me start by asking how can HR and mobility professionals listening today ensure the families they're relocating feel good about the move? How can they ensure they feel valued, they feel seen?

Matthew:

Well, thanks for that question. I think this is really the cornerstone of the good work that we get to do in relocation. Relocation is really one of the most wonderfully rewarding industries because we are asked to play a role at a very important time in people's lives. And there are a lot of, of course, important roles, important work that's done out there. But I think oftentimes, we don't realize how important the relocation professional and the relocation experience is to someone. It's just as important as their favorite high school teacher or their trusted physician, something like that. And so what I think is critical for us to recognize from that perspective, is that for people to feel as if the relocation is right for them, that it's a move, not only in the right career direction, financially, professionally, but to understand that we're moving this whole individual.

People are moving for much more than the practical aspects of a relocation. And what I like to say essentially, is that people aren't moving just for what they get. In other words, they get a promotion, they get more responsibility, they get an opportunity to live in a new country. What they're really moving for, is who they're about to become individually in that next chapter of themselves, that next version of themselves, but also whoever they're bringing with them, their significant other, their family, children, whoever is coming along for that ride, they're also entering into a new chapter as well.

So, if we really want to ensure that individuals and their families are feeling good about a move. That they're valued. We have to understand a little bit bigger picture of what's going on here. We're helping people become version 2.0, or version 3.0 of themselves. And if we keep that in the back of our mind, not only will we ensure that all the tasks and practical aspects are done, we'll recognize just how big a role we're playing in helping someone truly grow, truly evolve in their life.

Karen:

Matthew, I couldn't agree more the fact that as mobility leaders, we're not just moving people from point A to point B to point C, but we're actually creating another chapter in their lives. It's a huge responsibility; that focus on duty of care. And not that we didn't have enough responsibility to begin with, right? But I really think that should bring a lot of pride to mobility professionals, I certainly feel it. We don't just get a job done. We have the potential if we do it right to really make a difference in someone's life.

Trevor:

Yeah. And Matthew touched on that with the fact that work is only a small part of who someone is and the fact is, it's easy to pigeonhole perhaps the frontline consultant or mobility professional, as someone who helps someone with this work thing, this mobility thing, the boots on the ground, and the supply chain aspect and the tactical parts of moving for work. But, as Matthew put it so eloquently, when you're moving the whole person, you know, everything that's part of their life is part and parcel with that consideration. And how do you take that step back, whatever your level of involvement in the mobility game, and make sure that it's not a transaction, it's not even just an interaction, but you are as a whole person, yourself, helping this other whole person, not only move, where they're going to live, but toward who

they're going to become. And I know, Matthew, that there's a particular philosophy or resource that you talk about sometimes the book, "The Power of Moments," by Chip Heath [and Dan Heath], and the concepts underlying that that I think may be applicable here.

Matthew:

Absolutely. Let me just say that, when we think about the importance of this role, and the importance of the time we spend with the individual, and you know, his or her family that's relocating with them. First of all, I think it opens up a ton of creativity, there's just so much more, we can get involved in in an appropriate way, right? We're not trying to pry into people's lives. But we may have some creative, exciting, and interesting ways in which we can make sure that the move is meaningful to them beyond the practical aspects of it, and ensure that they're getting all of their needs met, all of the emotional, physical, personal, interpersonal, needs met.

And so I think that there's really a lot of creativity that is opened up when we think in these terms, and frankly, I think it just strengthens relationships, suddenly, it's not just Matthew who's calling to check in on item 23 of the action plan. It's Matthew, who's you know, super excited about, you know, getting involved in the local community, or getting involved in the local school system. And boy, I found some great information for him, and I can't wait to share it. So, you know, all of this kind of comes together in this line of thought, from a wonderful book that I read, I really would recommend it to everybody. It's called, "The Power of Moments." And it's by Chip and Dan Heath. And you know, there's a lot of great, great content in the book. But the line that stands out, which I think is so relevant to us in relocation is that in most cases of any experience in our life, but especially great service experiences, by and large, those experiences are mostly forgettable, but they are occasionally remarkable. And when you really get that phrase, right, it's mostly forgettable, and occasionally remarkable. First of all, that gives us a little bit of, I think, anti-anxiety, to worry about having to make a big deal out of everything.

Most of what happens is supposed to be forgettable, we get it done. Everyone's happy with that, but we don't have to make a big deal out of it. However, we can occasionally target moments, which are remarkable, whether that is the first time they stepped foot into their new home, or the first visit to the new location, or the first greeting into their new office, or meeting some new colleagues, you know, whatever those moments are, those occasionally remarkable aspects that happened before, during, and after the relocation. Those are the things people will remember for the rest of their lives. And if you think about the sort of the two things we've already talked about the importance of the whole person moving and the opportunity to create some occasionally remarkable moments in it. I think it's a formula for doing some amazing work with people who are moving on to the next version of themselves.

Trevor:

If I could tag onto that a minute, Karen, I think of a quote by a professor and psychologist out of Harvard named, Howard Gardner who says that stories are the single most powerful weapon in a leader's arsenal and kind of an aggressive phrase. But to Matthew's point about turning perhaps the quotidian into the remarkable, you have this idea of the mobility professional, not only as hand holder and support staff, and perhaps shoulder to cry on or lean on. But as a storyteller, who is, we've used the metaphor of chapters already, but if you're remembering that stories can inspire and teach and provide cautionary tales, and attract and motivate people, you know, a lot of that is overlapping when you're trying to convince someone to take a new job.

And then as they're going through that process of relocating the story of their experience is what they're going to tell themselves at the end of it. And so you can help be an integral part, a character, if you will, in that story, and not just someone who's helping move it along, like a conveyor belt, you know, that's just a tool, but you can be integral to the progression of their personal narrative.

And then someone that they talked about for years afterward, you know, Phil/Mary, they helped me become who I am today, because of their willingness to go above and beyond their humanity. Cartus told the story for years about this girl who had a pet goat, and her family was moving for work, and she would not move without her pet goat. And it's not easy to find a residence that allows pet goats where they were moving, and yet her Cartus consultant, moved worlds to make it happen. And then this girl became kind of like

a mascot for a couple of years for us on the branding and comms side, just because of her story and the willingness of her consultant to make it happen.

Karen:

Thanks, Trevor. Yeah, both great points from you, and Matthew, and I think, you know, what we have done is really taking a look at where people are kind of on this road, you know, you talk about this conveyor belt. And I think in the past, the move used to start with a Global Mobility Manager and Cartus. We have looked at the entire process. And we have actually identified [two pivotal roles](#) within the company that can really make or break the relocation experience, right, the first being that Selection Manager who's responsible for selecting and supporting employees, and also providing candidates with the opportunity to consider readiness, really meeting them where they are in their journey. So, that journey may be having a pet goat that you won't move without. And we really need to understand that upfront to know how we can formulate a plan to help that person be successful and want to move, and feel like they belong, right. And second, is the Receiving Manager, critical to ensuring readiness not only for themselves, but for their team, and really understanding the typical adjustment issues for assignees, as well as their families, right? And formulating a plan to successfully onboard that employee.

Matthew:

You know, Karen, if I could just add to that, because I really think that's a critical role that is played by both the Selection and the Receiving managers. And just to tie it back to something Trevor said, when you think about a good story, the most difficult thing to do is to know who's supposed to be playing which character. When I think about the best relocation professionals, the best Cartus Consultants, the best people that I've ever had a chance to work with, they got their role, right? Because in the story of the movie, we have to remember that the main character is the candidate, right? They're the main character, we're not the main character, we're the guide. We're that person who is there to suggest to them plans of action and to have their back as they do it, right. We're Obi Wan Kenobi to Luke Skywalker, or you know, Dumbledore to Harry Potter, right? We're not the main character of the story. But we're so critical to the story having the right outcome.

And so, I think about the, you know, Selection and Receiving Managers as they think about their role and the ways in which they can make an impact when they

recognize that they're the guide along an important journey that someone is making. They have a lot of opportunities to make things remarkable. They have a lot of power, to be able to say, hey, let's stop for a moment and celebrate this. Let's recognize this, let's make a milestone. And we can visualize it with a photograph or we can somehow even just take a pause in the process to recognize how far we've come and what's about to happen. All of these things stick and they lodge in the lives of the people that we're helping relocate, and they make a difference. You know, I think as Trevor said, years later, people will say, "Wow, I can't believe you moved to Las Vegas 10 years ago, 20 years ago," and someone said, "You know what, I don't think I really would have done it if it wasn't for the help of so and so." And that person is just part of their life story for a long time to come.

Karen:

Agreed. And just switching gears. You know, there was a study conducted by [Gartner, which found that 65%](#) of respondents indicated that the pandemic made them rethink the role that work should have in their lives. As we think about ways to improve the employee experience by strengthening employee engagement, it's worth noting that since the pandemic, that there there's been somewhat of a shift in people's priorities when it comes to work-life balance, hasn't there?

Matthew:

I would completely agree, I don't think it's possible for any of us to reflect on the last few years, and not recognize how it has helped us or, you know, in some cases forced us to reconsider our priorities. Now, I don't think that means that anybody is truly less dedicated to their career, or to their work. But I do think that it is raised the bar for certain aspects of how we do that work and how we are prioritizing both work and the rest of our lives.

And I think that that's absolutely something that is accentuated when people are relocating. Because it you know, if I just take a promotion, and you know, I'm not changing my house, I'm not changing my car, I'm not changing the way I drive to work, or if I'm working from home, I'm not changing the chair that I'm sitting in, but I take a promotion with some responsibilities.

Okay, that's, that's important. But when I now have to make those decisions, and I have a new set of priorities, those priorities are, you know, less time commuting, and more time with the family more flexibility in my hours, the ability to leverage technology to do my job, you know, those are things that are certainly of higher priority now than they were before the pandemic. Those are going to be additional and new criteria to an effective relocation.

So, I think that, you know, post pandemic, we've added some new factors to what employees would consider a worthwhile relocation. But at the same time, we have to remember that companies have become so adept at filling those needs and being versatile, to really handle those requests. And so it has changed, but I don't think it's changed that we haven't been able to adapt to, but we have to recognize that these are priorities that are just as important as the you know, the practical aspects of promotion, and earnings, and responsibilities.

Trevor:

Yeah, Matthew used the word, "versatile." And, you know, the phrase I think about alongside that versatility or agility, which we'll circle back to, certainly is that work-life balance, which obviously has been part of the cultural vocabulary for decades. I'm doing this interview from over my garage in our spare bedroom where, you know, I've been since COVID, and much of our company has, but at the same time Cartus, recognizing that need for versatility/agility (I told you we'd circle back), and actively implementing a hub strategy where we are in the process of reopening or have already opened, you know, brand new offices in places like Singapore and Swindon, and soon, Connecticut and Shanghai, China, the idea that employees still crave this in-person collaboration and connection, and the creativity that often can only come from those in-person interactions.

Well, now they have that option, but not that mandate. And so, when you want to get together with your team, that hub is there for you. And otherwise, you can do your day-to-day job from whatever location works best for you, and the life that is integrated more so than ever with your work.

Matthew:

And if I could just add something, you know, I really love this concept of the hub, and I love this concept of agility. The interesting thing, I guess I'm just playing off of that is, I think some people may have mistakenly thought that since the pandemic's inspiration, if you will, for companies to use more work-from-anywhere technologies, I think some people mistakenly thought that that technology, technological revolution would decrease people's willingness to relocate, and I actually see the opposite as a very compelling story to be made if I want work-life balance.

And I prioritize some of that balance, in really personal ways I like to hike, I like to run, I like to play outside. But currently I'm living, you know, in a very urban environment, because the best way to get work-life balance is to have the shortest subway commute to the office, I actually see, you know, the willingness of my company to say you can work from anywhere as a reason to then volunteer to relocate, to raise my hand and say, "Alright, I'm excited to try a new, you know, a new physical location or a new community of people to be around. Maybe I love food. And I think that's really important to my overall satisfaction in life." And so, you know, now there's an opportunity to relocate to some incredibly foodie area of the world.

Again, I look at that agility, that versatility and the combination of the changing of priorities and technologies as a reason for us to be very, I suppose bullish about relocation and candidates saying, "I do want to try this, and I don't have to wait to relocate until I either, you know, reach a certain level in the organizational structure, or even quite frankly, you know, I don't have to wait for just those opportunities."

That happened infrequently, they might actually be more frequent, as companies learn how effective it is to be able to move people enhance their work-life balance, and see that reflected in their productivity as well.

Karen:

Absolutely. I mean, we have certainly seen a shift in the demographic, right. So, you definitely have a lot of Gen Zers who are, you know, as you would say, in the past, typically wouldn't be offered an assignment. Whereas in today's world, especially post-pandemic, we're seeing a lot of organizations even using that as a recruitment and retention tool, because you do have people who are raising their hands, and they're saying, "Hey, I want to go to a new location, not only for my own self development, but for other reasons as well." Whether it's, you know, a place that they want to go that, you know, Matthew mentioned, because they're a foodie, or they want to hike, or whatever that flexibility that that role will bring. They're raising their hand. And we find that in many cases, if organizations aren't offering that person, that Gen Z may say, "Listen, you're not the organization for me, I'm going to go somewhere else where that would be something that they would be able to accommodate for me."

Karen:

Hi, listeners full transparency. We only planned to do one episode on this topic. But the discussion included such great content that we decided to create a two-part special. So, we'll leave it here for today. I hope you enjoyed part one of, "Moving the Whole Person," with our special guests, Matthew Ferrera. Stay tuned for part two in the coming weeks, where we discuss relocating employees managing change and the importance of relationship building. I promise it is not one to miss! For more episodes, be sure to subscribe to "Mobility Matters" through your favorite podcast streaming platform. Until next time, thank you and take care.

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