WHITE PAPER

Redefining the contribution of the Global Mobility profession

In this paper, we will explore "what next" for Global Mobility professionals over the next 24 months as we rapidly move towards the next decade. In our recently published research findings Global Mobility Survey 2019 (GMS 2019), **REVISION:** Mobility through the looking glass[1], we have seen the progress reported by many professionals in the changing nature of their Global Mobility roles.

Other research[2] also suggest similar challenges and opportunities, which are not the exclusive domain of Global Mobility. Organisations are changing. Maybe not all at the same pace and some will continue to be comfortable with what has now become the traditional HR model of HR business partner, centres of excellence and shared service centres.

The Internet of Things (IoT), artificial intelligence (AI) and increasing pace and complexity of international work arrangements are all contributing to a more blurred, uncertain future. Agile and flexible, structured and consistent, commercial, innovative, subject specialists in all matters associated with compliance, HR, relocation, local country employment market practices, analytics, employee counsellors—what a job role!

What do Business Leaders think will impact Global Mobility teams over the next 24 months?

Tailored talent solutions

As Global Mobility programmes move away from traditional assignment-based arrangements and talent sources become truly global, expectations of a more personalised, technologically enabled relocation experience will be an important factor in the competition arena for scarce people resources. Companies seeking the best return on their talent investment will look to offer personalised and segmented mobility programmes. Instead of a 'one size fits all' approach, companies have been focusing on segmented policies where they can provide relocation conditions and allowances tailored to employees' circumstances by assignment type, assignment length, employee status etc. Attracting, engaging and retaining employable talent is one of the most important priorities for organisations, and Global Mobility teams need to establish their place in their organisation's process.

Tackle a broader risk profile

With increased flexibility and more virtual work arrangements, risk management and duty of care will have more focus and pressure from potential breaches. This includes International business travellers who, in some cases are performing work duties in a host location may require necessary visas and work permits to do so and fiscal arrangements such as real-time payroll reporting. Government agencies will be actively looking for breaches of immigration and fiscal laws and tools such as posted worker notifications within the EU are increasingly being used to capture data. Governmental connected technologies are creating a domino effect of one breach being pursued by another agency, who then share with agencies in another country. Thus, management of broader risk base—both at the organisation and the employee level, means that duty of care will be escalated at board levels for more governance. GDPR (General Data Protection Regulations) May 2018 are starting to be felt in some high-profile cases. Will this start to bite over the next two years and beyond?

Busy work doesn't always equate to value creation

Global Mobility professionals will need to refine with their broader internal stakeholders, those mobility roles and activities which will remain vital inside their organisation and which activities might be better managed by a specialist external partner, who can offer the scale, scope and technology to enable outstanding employee experiences in an agile, risk assured manner.

Underpinning this will be the pro-active use of data analytics, some of which will be robotised, and some will be enablers for Global Mobility and HR teams to deliver incremental innovation to support their organisation's competitiveness in their marketplaces.

Additional research from Santa Fe's Global Mobility Survey 2019, REVISION: Mobility through the looking glass, provides a very clear picture that Business Leaders foresee significant impact on key areas; innovation:

+ New ways to attract, retain and engage talent (both externally and internally);
+ More involvement by Global Mobility professionals in the talent agenda;
+ Enhanced internal capabilities of Global Mobility in terms of using technology and digital skills.

Fig. 14. from the survey provides the global picture of predicted transformation within Global Mobility teams and **Fig 15.** highlights an even more radical perspective from North American Global Mobility professionals. This desire to separate the hygiene (operational activities) and strategic remits by connecting more closer with other teams such as talent, reward and HR business partners is a route to greater inclusion and involvement in strategic decision-making.

In a recent LinkedIn post by Professor Dave Ulrich; "What is your point of view about what's next for HR?[3]", he delivers his eight point of view of what's next for HR and its major evolving trends. Insightful views and worth reviewing.

One quote from Professor Dave Ulrich in his article resonates with the feedback from GM leaders:

> What is the best thing HR gives an employee? Answers generally include a meaningful job, purpose, colleagueship, fair pay, opportunities to learn and grow, and a good work setting. While I agree, I think the best value HR gives an employee is a company that wins in the marketplace. Without winning, there is no job. The measures of HR success are less about HR activity or insights and more about the impact on business results.

Professor Dave Ulrich
Speaker, Author, Professor, Thought Partner on HR,
Leadership, and Organisation

Note: Graphs referenced from our Global Mobility Survey 2019 maintain the same numbering system as the survey. This should make it easier for you if you want to get a more detailed view on the graphs from the actual Global Mobility Survey 2019. Graphs from Savanta's additional research have been referenced using letters e.g. Fig. A.

The day-to-day role of Global Mobility professionals is likely to evolve in the coming years, to allow for a closer focus on talent by shifting the responsibility for the operational hygiene activities to technology or vendors. Nearly two thirds (73%) expect their Global Mobility team structure to transform in some capacity.

This has significant implications for Global Mobility—which could see some organisations deconstruct current structures to better align with their business and talent priorities. Many Global Mobility teams are likely to remain one group but should perhaps, take a long, hard look at their priorities and value-based activities.

Similarly, no-one would challenge the value of operational excellence as a prime goal of Global Mobility teams, but the real question is whether this is best delivered internally, externally or some other flexible arrangements. Whether this is re-imagining or re-imaging Global Mobility's contribution, each organisation will decide their focus and priorities. Defining purpose and alignment with the emerging international workforce arrangements that were explored in section one of the report are mission critical.

Attracting, engaging and retaining employable talent is one of the most important priorities for organisations and Global Mobility teams need to establish their place in their organisation's process.

Fig. 14: How Global Mobility team structure will evolve over the next 24 months (GM)

Global Mobility strategic functions absorbed by HR business partners or divided between talent and reward. Operational activities outsourced to internal HR shared services including expense management plus external use of relocation, immigration and tax services	38%
Global Mobility function restructured to focus on talent and/or advisory support and operational activities outsourced to specialist Global Mobility providers (assignment management, relocation, expense management, immigration and tax services)	36%
Redefined role focused on strategic talent mobility working as part of the talent function with reduced/no operational involvement	26%
Redefined role focused on strategic advisory Global Mobility business partnering with reduced or no operational involvement	23%
Other	3%
No change	27%

Fig. 15. provides a regional perspective from North America, where the trends shown in **Fig. 14.** are even more accentuated. The North America Global Mobility professionals appear to be even more radical in their views on the extent of the Global Mobility transformation. There is a significant intention to separate hygiene (operational interventions) to refocus on working in broader teams where there is an opportunity to be more engaged in strategic, forward looking decisions on talent deployment, reward and policies that will address a diverse workforce's expectation in a consistent way.

Fig. 15: How Global Mobility team structure will evolve over the next 24 months (North America)

Global Mobility strategic functions absorbed by HR business partners or divided between talent and reward. operational activities outsourced to internal hr shared services including expense management plus external use of relocation, immigration and tax services	57%
Global Mobility function restructured to focus on talent and or advisory support and operational activities outsourced to specialist Global Mobility providers (assignment management, relocation, expense management, immigration and tax services)	50%
Redefined role focused on strategic talent mobility working as part of the talent function with reduced/no operational involvement	39%
Redefined role focused on strategic advisory Global Mobility business partnering with reduced or no operational involvement	35%
Other	2%
No change	9%

Additional research data from the survey reveals in **Fig. A.** a 13-industry perspective of the predicted evolution of Global Mobility roles and team focus over the next twenty-four months. There is correlation with the global data provided for all participants and with the regional view from North America.

Fig. A. How Global Mobility team structure will evolve over the next 24 months by Industry

Industries	**Aerospace**	**Automoti-ive**	**Construc-tion**
Global Mobility strategic/advisory functions absorbed by HR business partners or divided between talent and reward. Operational activities outsourced to internal HR shared services function(s) including Expense Management plus external use of Relocation, Immigration and Tax Services	29%	28%	**51%**
Global Mobility function restructured to focus on talent and or advisory support and operational activities outsourced to specialist Global Mobility providers (Assignment Management, Relocation, Expense Management, Immigration and Tax Services)	33%	**38%**	**46%**
Redefined role focused on strategic talent mobility working as part of the talent function with reduced/no operational involvement	29%	28%	24%
Redefined role focused on strategic talent mobility working as part of the talent function with reduced/no operational involvement	29%	14%	24%
Other	0%	0%	0%
No change	24%	31%	16%

In particular; seven industries reported higher levels of expected movement for Global Mobility activities to become re-distributed into either generalist HR business partner roles or divided between talent and reward, with operational hygiene re-allocated into internal shared service centres in tandem with external mobility supply-chain for relocation, immigration and tax services.

Construction	Consumer products (FMCG)
Financial	Manufacturing
Retail	Technology and communications
Transport and logistics	Utilities and energy

Perhaps the underlying reasons for these changes are driven by an increasing requirement to better support the organisation in sourcing, screening and preparing employees and international hires to ensure the pipeline of talent is sufficient to meet the current and changing future jobs needed to compete in the digital world. Sectors including financial and manufacturing have recognised that their traditional labour pools, many of whom have been loyal and long-serving, may need to re-skill, adapt or develop lateral careers in other parts of the organisation. Sectors that are digitising fastest, are those that are having to be the most strategic and agile in their Global Mobility programmes. In parallel, we have experience of companies commissioning consultancies to undertake SG&A (staff, general and administration) FTE (full time equivalent) and cost reviews of central and support functions to align with market conditions and the impact of digitised activities that have been automated and streamlined.

In addition, automotive and financial sectors report similar high predictions of Global Mobility function restructured to focus on talent and or advisory support but in this case, operational hygiene activities outsourced to external specialist Global Mobility providers (Assignment Management, Relocation, Expense Management, Immigration and Tax services). Interestingly, Retail in this survey are the only ones who see their roles completely focusing on non-operational mobility day to day activities.

For those verticals, not predicting similar change, it is possible that this reflects the long-term nature of their business cycles and perhaps a less pressing need to adapt to economic pressures and the cultural pace of change in their organisations. With all transformations, this is not a case of Global Mobility undertaking this in isolation. It must be part of a broader transformation process and these findings provide evidence that many Global Mobility professionals recognise that change is not an optional choice.

Consumer (FMCG)	Engineer-ing	Financial	Manufact-uring	Pharma. & Healthcare	Profession-al Services	Retail	Tech. & Comms.	Transport & Logistics	Utilities & Energy
42%	31%	34%	**43%**	25%	**37%**	**54%**	**47%**	**48%**	37%
25%	27%	**40%**	**45%**	32%	31%	**46%**	36%	**52%**	26%
17%	25%	24%	28%	21%	24%	34%	**39%**	26%	21%
8%	31%	26%	15%	14%	27%	**40%**	30%	22%	26%
4%	2%	3%	1%	11%	8%	0%	1%	0%	0%
42%	29%	25%	29%	32%	27%	16%	17%	22%	37%

These findings suggest that organisations are weighing up their options on whether to deliver services through an internal organisation shared services unit or alternatively by partnering with specialist external assignment services providers. For Santa Fe Relocation, being one such Assignment Management services provider, it would be disingenuous to suggest that external partnering will be the right solution for all Global Mobility functions. What this evidence does provide however, as we highlight in the GMS 2019, reimaging or indeed, re-imagining future Global Mobility contributions requires objective and sometimes searching discussions with executive leadership.

In our Effective transformation in Global Mobility White Paper, search "Effective transformation in Global Mobility", we explore the application of the Johari model[4] to Global Mobility professionals/leaders. For transformation decisions to be sustainable, effective outcomes—all stakeholders have to a level playing field of knowledge about:

+ The full scope of what Global Mobility professionals are engaged with.
+ A full picture on total global spend for Global Mobility programs.
+ The purpose and criticality of global talent deployment.
+ The significant fiscal and people risks of getting it wrong and breaching compliance and immigration regulations.

As a reminder of Professor Dave Ulrich's comments;

The measures of HR success are less about HR activity or insights and more about the impact on business results.

Professor Dave Ulrich
Speaker, Author, Professor, Thought Partner on HR, Leadership, and Organisation

Outside-in thinking

In a recent article (June 2019), BCG Henderson Institute (Boston Consulting Group), explore the need for organisations to approach the 20s from a different perspective, one which has evident adoption by global organisations who are transforming their business strategies and models from outside in.

In the past 20 years, we witnessed unprecedented organisational re-structures, consolidation and insolvencies in the face of the fourth (digital) industrial revolution, globalisation, regionalisation and a series of politically de-stabilising shifts in power in established and emerging locations across the globe. More recently, we are now experiencing increasingly partisan behaviour at government level by nations seeking to bolster their own prosperity. In parallel, through the immediacy of social media and the internet, the world's social conscience is creating pressure on corporations to re-think their purpose, value and goals—from the outside in.

In support of the reported focus on transformation in **Figs. 14. & 15.** and **Fig. A.** it is evident from additional research findings from GMS 2019 in **Fig. B.** that Business Leaders see innovation as a key influence on mobility's future roles, driven by analytics, talent tools and alternative social media channels—which of course, reflects the widely reported statistic that by 2025, 75% of the global workforce will be millennials.

Hand in hand with these changes, from a team structural perspective, business leaders see mobility professionals being able to influence the commercial dimensions of their roles, especially in the area of evaluating the capital expenditure on investing in technology (make or buy decisions) and indeed a more commercial focus on the total costs of delivering a Global Mobility programme.

Fig. B. Impact of interventions and trends on the Global Mobility function

Innovation—use of big data, social media and talent software tools to attract, engage and retain new resource pools of employees	47%
Innovation—enhanced use big data, internal company intranet/social media to advertise international employee mobility career opportunities to a wider existing employee base	45%
Talent management–increased involvement of Global Mobility function	45%
New global/data/digital competence in Global Mobility team(s) required to support business needs	40%
Drive policy changes—revisions of existing policies	40%
Cost implications—increased investment in technology solutions	38%
Cost implications—increased executive pressure to provide commercial/financial reporting on total Global Mobility programme costs	34%
Resource implications : insufficient internal allocation of Global Mobility resources to align with business needs	28%
Drive policy creation—new types of policies to reflect new workforce patterns	28%
Wider stakeholder engagement by Global Mobility teams to align with changing business and commercial expectations	19%
None of the above	0%

With this context, we now re-examine the self-report from Global Mobility and HR professionals in the survey on where they currently spend their time and ideally how they should be spending their time. **Fig. 16.** provides the consolidated view of where Global Mobility spend most of their time versus should be spending their time.

Fig. 16: Where Global Mobility spend most time versus should be spending their time

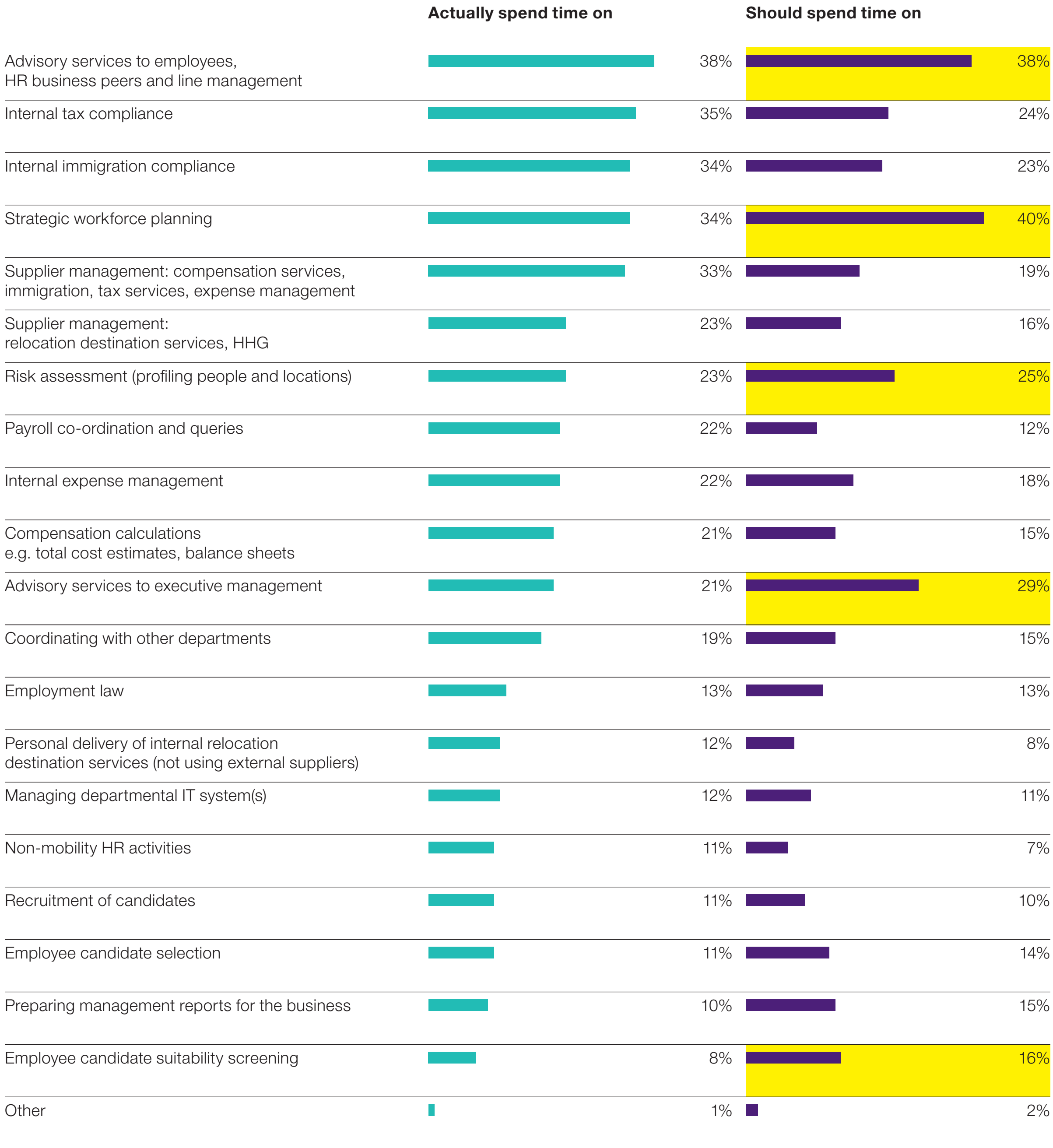

Fig. 16. does highlight some interesting changes from the same findings in the 2018 survey and there has been positive progress made by Global Mobility in re-shaping their roles to focus less on compliance related activities and more on those which the Business Leaders value.

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Fig. 18: Business Leaders' view of where Global Mobility spend most time and should spend most time

	Actually spend time on	Should spend time on
Strategic workforce planning	40%	46%
Employee candidate suitability screening	32%	21%
Employment law	30%	17%
Supplier management compensation services immigration, tax services, expense management	30%	19%
Payroll co-ordination and queries	26%	8%
Recruitment of candidates	26%	12%
Employee candidate selection	26%	27%
Coordinating with other departments	25%	21%
Advisory services to executive management	23%	27%
Advisory services to employees, HR business peers and line management	23%	38%
Risk assessment (profiling and locations)	21%	33%
Internal immigration compliance	19%	13%
Internal tax compliance	19%	15%
Compensation calculations e.g. total cost estimates, balance sheets	19%	19%
Personal delivery of internal relocation destination Services (not using external supplier)	19%	21%
Supplier management: relocation, destination services, HHG	17%	10%
Non-mobility HR activities	17%	13%
Internal expense management	17%	27%
Managing departmental IT system(s)	15%	12%
Preparing management reports	15%	15%
Other	0%	0%

Fig. 18. reports on Business Leader's view of Global Mobility activities, which aligns with Global Mobility's own views. Global Mobility teams have a clear mandate to make the case for time investment in contributing to the strategic workforce planning agenda—which can only be defined at organisation level and not a generic positioning. Of course, this is unlikely to be fully realised if the expectation is to continue to be focused on compliance and deferring change by continuous reactive behaviour in partnering with the business.

Advisory services are also highlighted as an important focus area. Interestingly, 38% of Business Leaders think this should be a priority for the management team—and as we saw earlier, 38% of Global Mobility professionals say it already is. This implies therefore, that they may need to improve the visibility of their advisory services, to help demonstrate the value they are already providing and whether that advice is at a strategic or operational programme level.

Other areas of opportunity include advisory services to executive management (27%)—another view common to Global Mobility professionals—and risk assessment (33%).

Where Global Mobility spend most time versus should be spending time—a multi-industry analysis.

Fig C. on the following pages, provides further additional research data from the survey findings—providing an industry view and to provide a sample we have restricted this to seven sectors.

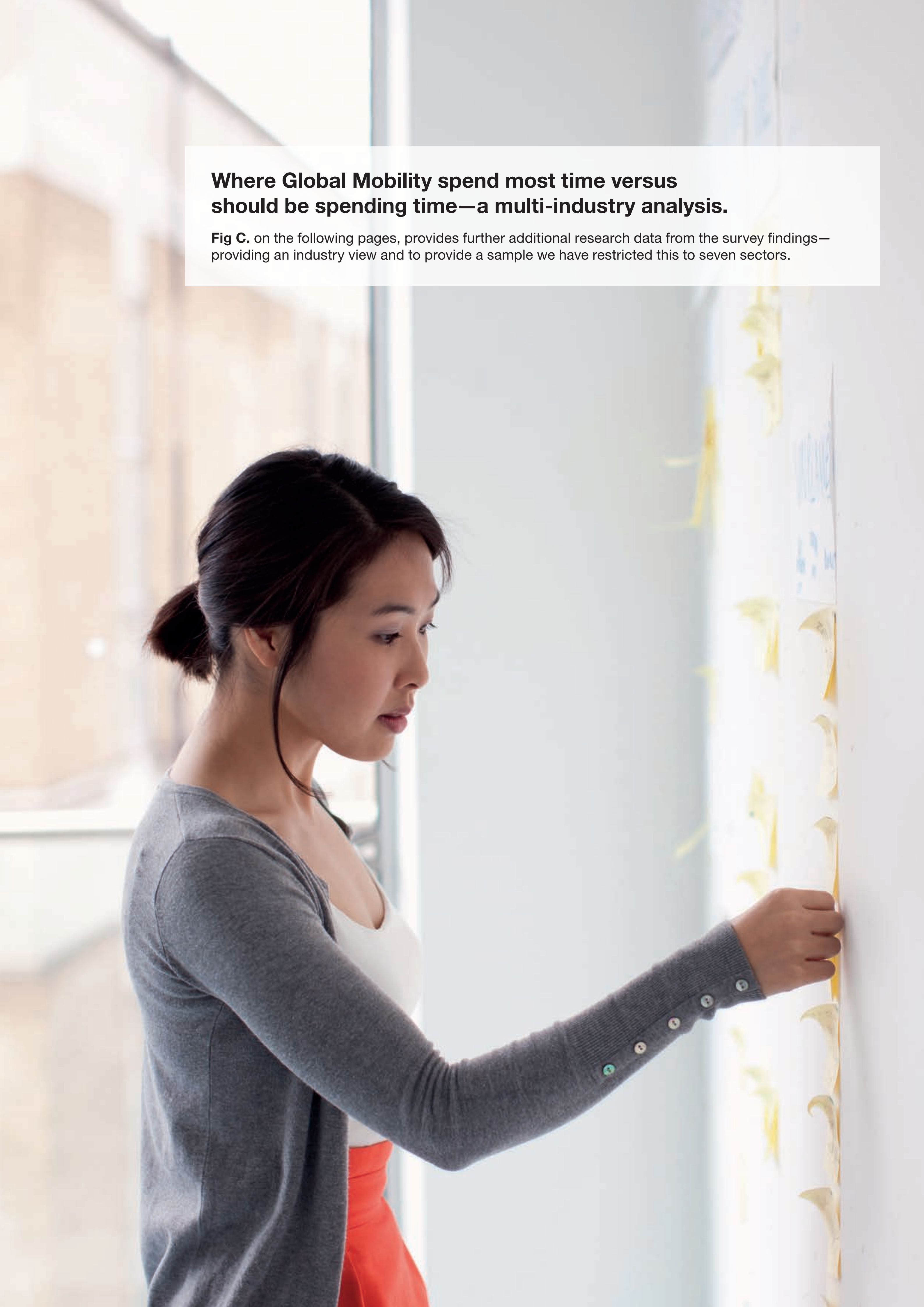


Fig. C: Where Global Mobility spend most time versus should be spending their time

Industries	Construction		Engineering		Financial	
Should spend time versus actually spend time	**Actually**	**Should**	**Actually**	**Should**	**Actually**	**Should**
Advisory services to employees, HR Business peers and line management	37%	42%	52%	31%	40%	48%
Internal tax compliance	26%	30%	41%	20%	43%	30%
Strategic workforce planning	37%	30%	28%	35%	34%	42%
Internal Immigration compliance	29%	12%	52%	35%	38%	18%
Supplier management: Compensation Services, Immigration, Tax Services, Expense Management	37%	15%	26%	12%	35%	23%
Supplier management: Relocation Destination Services, HHG	17%	18%	19%	16%	18%	23%
Risk assessment (profiling people and locations)	29%	27%	26%	22%	17%	17%
Internal expense management	29%	18%	20%	14%	22%	23%
Payroll co-ordination and queries	20%	12%	20%	14%	17%	8%
Compensation calculations e.g. total cost estimates, balance sheets	29%	15%	24%	14%	20%	20%
Advisory services to executive management	23%	24%	17%	31%	25%	28%
Coordinating with other departments (both functional or regional)	17%	12%	22%	14%	9%	18%
Employment law	14%	12%	13%	20%	15%	10%
Personal delivery of internal Relocation destination services (not using external suppliers)	20%	3%	15%	12%	17%	8%
Managing departmental IT System(s)	14%	30%	13%	14%	9%	8%
Non-mobility HR activities	3%	0%	13%	6%	11%	5%
Employee candidate selection	11%	12%	13%	10%	8%	15%
Recruitment of candidates	17%	12%	15%	12%	9%	12%
Preparing management reports for the business	11%	9%	11%	14%	6%	13%
Employee candidate suitability screening	6%	12%	13%	16%	12%	13%
Other	0%	3%	0%	0%	2%	2%

Significantly higher   Significantly lower

Manufacturing		Professional services		Retail		Technology and communications		Global Mobility Survey as a whole (Fig. 16.)	
Actually	**Should**	**Actually**	**Should**	**Actually**	**Should**	**Actually**	**Should**	**Actually**	**Should**
44%	42%	36%	29%	40%	42%	24%	28%	38%	38%
30%	27%	27%	14%	35%	33%	31%	25%	35%	24%
30%	47%	34%	48%	44%	33%	42%	38%	34%	23%
34%	23%	20%	14%	35%	31%	41%	26%	34%	40%
36%	17%	25%	19%	35%	20%	26%	15%	33%	19%
24%	21%	14%	5%	17%	11%	28%	14%	23%	16%
21%	29%	30%	29%	25%	20%	33%	33%	23%	25%
21%	14%	16%	24%	29%	18%	15%	16%	22%	12%
24%	11%	18%	7%	10%	16%	20%	13%	22%	18%
26%	15%	18%	14%	23%	13%	14%	14%	21%	15%
17%	38%	23%	31%	29%	22%	23%	28%	21%	29%
19%	9%	18%	10%	15%	11%	15%	14%	19%	15%
13%	11%	5%	10%	13%	9%	13%	15%	13%	13%
16%	2%	11%	2%	10%	18%	12%	10%	12%	8%
10%	9%	11%	5%	8%	13%	23%	6%	12%	11%
10%	8%	9%	2%	8%	7%	14%	10%	11%	7%
11%	12%	9%	14%	8%	13%	16%	21%	11%	10%
10%	11%	9%	7%	10%	13%	8%	8%	11%	14%
11%	11%	11%	19%	10%	11%	7%	18%	10%	15%
6%	15%	11%	21%	10%	18%	3%	15%	8%	16%
0%	0%	0%	7%	0%	0%	0%	0%	1%	2%

Clearly, different industries will have their requirements but overall, some emergent trends suggest:

+ Strategic workforce planning remains an area where Global Mobility professionals want to be more connected;
+ Increased advisory support to executive leadership and in some sectors with their broader stakeholders (where this is desired to reduce, it may be that this involves advice that could be delivered from a different resource approach for example via technology, shift to HR generalist peers or through an external partner;
+ Relatively similar prioritisation of risk management activities;
+ Increased engagement around talent hiring and screening for an international work arrangement;
+ Overall, less time on compliance and hygiene activities— immigration, tax, compensation and payroll coordination;
+ Overall, less time on supply-chain management;
+ An increase in the time spent on delivering management reporting into the business.

In summary, therefore, similar emergent themes can be seen on both geographical and vertical sector data sets.

There are no black and white answers and each organisation will have its cultural preferences. It does however, reinforce our view that organisations are proactively considering their options on how best to structure their talent mobility teams.

Digital innovation and the impact of technology

Are you a robot?

For those who are currently embracing or getting to grips with the fourth industrial revolution, we have some news—The fifth industrial revolution looms[6]: The convergence of technology and humans is quickly barrelling us into the fifth industrial revolution: the era of artificial intelligence. Vaughn Naidoo, CTO of Altron Bytes Managed Solutions describes how we need to put the seatbelt on ready for the next turbo-charged leap towards our next transformation.

As Naidoo points out

> In robot utopia, the importance of innovation and advancement is not only embraced but celebrated without fear of a total machine takeover or the extinction of man. Ultimately, the unknown is exciting and as humans we can't seem to stop ourselves from delving into it and pushing every limit to see what's possible. Whatever side of the fence you're on in predicting humanity's fate, there's no stopping the technology bullet train or the robots it is carrying.

Vaughn Naidoo
CTO
Altron Bytes Managed Solutions

Returning to the fourth industrial revolution, the challenge is to leverage technology—which we already see—mobility online tools to initiate assignments, integrated systems that delivered real-time work-flows, compensation and tax tools that can connect with organisations' HRIS and finance systems through Application Programme Interfaces (APIs), combined with data analytics that can provide designated stakeholders with dashboards and analytics that can deliver insightful talent data to support talent heat mapping on a global basis.

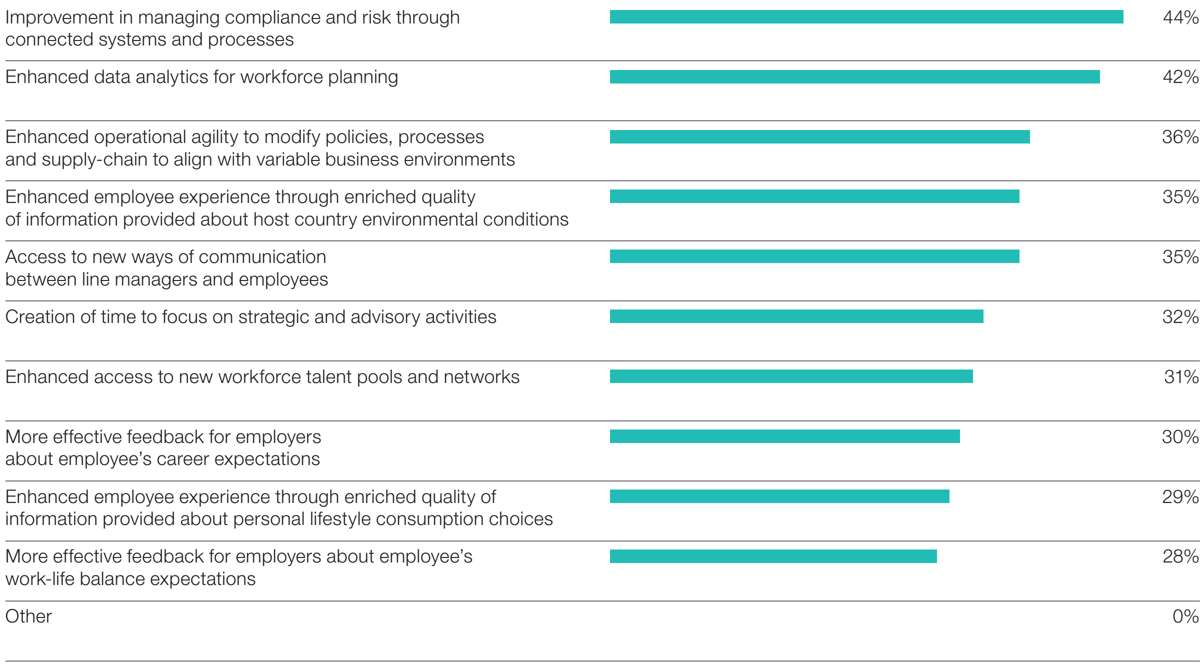
For this reason, the focus during this fourth industrial age should be on establishing the right Global Mobility ecosystem with internal and external mobility partners. To provide context on Global Mobility professionals' view on digital innovation, **Fig. D.** provides additional research data from the Global Mobility Survey 2019. This highlights that mobility professionals see the immediate benefits of enhancing their operational performance in the compliance arena and the strategic opportunity to migrate towards delivering data analytics to support organisation competitiveness. Combined with the other findings, it demonstrates an awareness of the broader benefits of embedded digitised technology into the Global Mobility programme.

At Santa Fe Relocation household goods virtual home surveys are already a solution in use by our moving services organisation. There are also self-service on-line destination service offerings, which adopted for the right relocation activities will be appropriate.

International work arrangements however, require the coordination of multiple services in two or more country combinations. While some activities can be automated and delivered through internet-based activities, it would be one-dimensional thinking to assume that human interaction can be eliminated. The complexities associated with mobilising employees and their family unit will span a whole continuum of emotional, personal and business requirements to ensure duty of care for the organisation in their compliance for immigration and fiscal liabilities and at the human level, ensure that the organisation has supported and indeed motivated and engaged their employees throughout the relocation experience.

Based on **Fig. A.** it is clear that Global Mobility professionals would be better served to undertake a broader evaluation of how to design their programme looking at all factors, rather than focusing exclusively on sourcing a proprietary Global Mobility software system as an isolated activity.

Fig. D. Global Mobility’s awareness of digital innovation



As organisations become digitally mature, the use of predictive analytics will greatly enhance the contribution that organisations will derive from their Global Mobility teams. Taking this one stage further and we migrate towards the embedded use of chatbots which today, it is hard to know if one is communicating with a robot or a human being and virtual reality tools to enable virtual activities across the HR continuum from on-boarding, self-managed learning to virtual home finding trips in the designated host location.

Conclusion

We have explored in detail analysis from both business leaders and Global Mobility professionals regarding their future roles over the next 24 months and see that transformation is likely to impact the structural shape and indeed purpose of Global Mobility's contribution.

One radical view could suggest that Global Mobility teams over the next decade could deconstruct with activities being redistributed between talent/reward functions or back into HR generalist teams, with operational hygiene—compliance and supply-chain relocation activities being re-allocated to internal shared service centres or out-sourced to Global Mobility specialist organisations. Conversely, the Global Mobility function in organisations could thrive as a more commercially focused talent and advisory unit, underpinned by data analytics that support innovation.

The way forward should be based on authentic discussions with internal stakeholders to ensure full knowledge and awareness of the whole Global Mobility purpose is recognised and as we have described a holistic approach is taken to determine the right future looking business model. We provided a transformation checklist in our 'Effective transformation' white paper and this is attached as an addendum with this paper, given its relevance to these findings and insights.

About the authors

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Recognised as a thought leader and speaker on strategic international HR, talent management and Global Mobility, John has 15 years of global consultancy experience. Having previously held senior HR leadership roles in numerous global businesses across a range of industry sectors, John now works with global organisations to create value and improve the structure of Global Mobility programmes; focusing on aligning strategic objectives with operational delivery. John can be contacted at john.rason@santaferelo.com.

Peter Ferrigno, Global Practice Leader, Immigration and People Director

As a highly experienced Global Mobility consulting practitioner, Peter has more than 25 years' experience working for the big four, establishing and building Global Mobility practices across Europe. He has worked as a senior advisor to many FTSE 100 and Fortune 500 companies and, in his current role, aligns people and business strategies that support customer satisfaction and overall process improvement initiatives. His advisory expertise spans across Global Mobility, tax, immigration and HR. He is a chartered tax advisor and is a chartered accountant.

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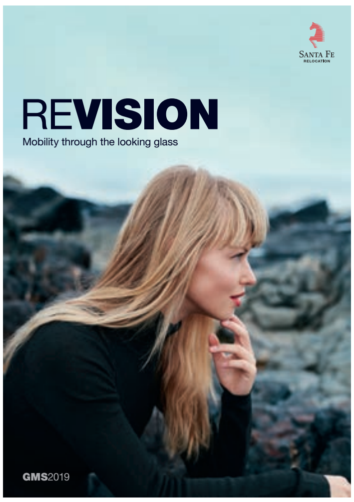
1. REVISION: Mobility through the looking glass. Santa Fe Relocation Global Mobility Survey 2019 (GMS 2019). May 2019. **2.** RES Forum 2019. **3.** What is your point of view about what's next for HR?. Prof. Dave Ulrich, etc. July 2019. **4.** Luft, J. Ingham, H. (1955). The Johari window, a graphic model of interpersonal awareness. Proceedings of the western training laboratory in group development. Los Angeles: University of California, Los Angeles. By Allison Bailey, Martin Reeves, Kevin Whitaker and Rich Hutchinson. **5.** BCG Henderson Institute, April 2019. **6.** Vaughn Naidoo, CTO, Altron Bytes Managed Solutions. Johannesburg, March 2019. The fifth industrial revolution looms. The convergence of technology and humans is quickly barrelling us into the fifth industrial revolution: The era of artificial intelligence. **7.** Janine Vos, Member of the managing board and CHRO, Rabobank. REVISION: Mobility through the looking glass. Santa Fe Relocation Global Mobility Survey 2019 (GMS 2019). May 2019.

Global Mobility is rapidly evolving and the discussions that were written and presented at conferences about Global Mobility professionals having a set at the top table. These infer an emphasis on asking for permission rather than attracting attention through commercially based, data and analytical rich insights that influence strategic decision making across the talent mobility continuum. Trusted advisor status will only be given by leadership when they tangibly see the value created by those advising them.

If organisations are to thrive and compete in the 2020s and beyond, it will require key internal actors to tear up the traditional rule books and organisation hierarchies to create new tribes and squads as Janine Vos[7] describes her HR organisation at Rabobank.

Despite all the well-publicised reportage of geopolitical issues, increasingly complex cross border compliance regulations and talent shortages, the fourth industrial revolution has brought with it the most exciting opportunities to combine human and digital power behind the facilitation of international work arrangements.



Santa Fe Relocation Global Mobility Survey 2019

REVISION: Mobility through the looking glass

To view our full report simply click the button below or search: “Global Mobility Survey 2019”.

Checklist

Example: An international company transforming into a multinational corporation

A growing International company that has recognised that global is how they describe themselves but, the majority of transfers originate from home country talent. They now want to become a more diverse, multinational organisation that will be hiring employees with new skills and competencies allowing them to compete with disruptors who have eroded their market share in traditional markets whilst maintaining governance over all forms of internationally mobile employees. Today, they have a maximum of one or two Global Mobility specialists managing Global Mobility with local host countries delivering Global Mobility support.

Mission

Establish the organisation's future Global Mobility service model over the next five years to achieve structured flexibility to ensure that mobility delivers employee experiences that will align with a diverse, multigenerational workforce.

Scan: There are probably many other considerations

1. Establishing the big rules—the executive value drivers: cost, speed, governance, risk management, build new cadre of international talent—who provides the briefing?
2. Evaluation of current policy(ies)—will they align with the talent requirements planned by the executive leadership?
3. Is there a full baseline cost for the total Global Mobility programme? (All employee and support costs associated with the formal Global Mobility programme, excluding business travellers).
4. What management information and data analytics are provided today and what should the data sets be, post transformation? (Do data analytics drive competitive advantage or historical reporting?)
5. Do we understand the customer journey and assignment experience today?
6. What systems are currently used to manage all aspects of the mobility programme?
7. What is our current risk profile for compliance with fiscal, immigration and employments legislation in home and host locations?
8. Establish a complete assessment of the mobility supply-chain (not only in headquarters but also in host locations too), scope, pricing and ideally assignee/user experience feedback.
9. Will reporting lines for Global Mobility remain unchanged or is there a broader transformation plan for HR too?
10. Who are the critical stakeholders internally, their roles, and importantly, their understanding of Global Mobility. Do you need to bring them together for a visioning session prior to deciding upon your preferred resourcing models?

Focus: Design stage

1. Who will be the executive sponsor?
2. Stakeholder engagement—providing business unit leaders with a briefing of pros and cons of each Global Mobility operational service model to vote on their preferred mobility model (in-source centralised, in-sourced decentralised and out-sourced centralised and de-centralised).
3. Finalise mandate, for example, not to increase internal headcount in Global Mobility but redefine roles to focus on becoming HR mobility partners (advisory, talent and strategic planning).
4. Reporting lines in the transformed mobility organisation.
5. Decide on whether the organisation will rely on external partner's technology or also investigate the necessity to invest in technology systems or systems integration (if so, this will require capital expenditure and on-going operational expenditure for licence fees and non-standard configurations).
6. Build a balanced scorecard to determine the profile and criteria of desired external mobility partner(s) that align with the organisation's future talent mobility requirements.
7. Development of service scope for each parcel of work:
    a. **Compensation Services**
    Assignment cost forecasting, assignee individual compensation worksheet or balance sheet, international payroll instructions, compensation accumulation.
    b. **Assignment Management Services**
    Assignment letters, policy/process briefings, single point co-ordination model to initiate services for tax, immigration, relocation, personal household goods removals (home and host locations) and guide the assignee through their relocation journey on policy exceptional needs questions.
    c. **Expense Management Services**
    Reimbursements and financial deposit advances to enable the relocation and assignment experience to occur within the agreed timescales, financial reporting to the client organisation's Global Mobility/HR finance teams for cost tracking, financial reconciliations against the client funding account, periodic reporting including data to support annual tax filings by tax providers in relevant countries.
    d. **Management Data Reporting**
    Internal/external stakeholders requirements? Real-time or periodically (weekly or monthly) especially relevant when moving from a decentralised to centralised model.
8. Assembling the tender team: HR, business, procurement, legal, finance, technology?
9. Are these project time-scales that are achievable internally?
10. Liaise with Global Mobility peers in other organisations with experience of these processes.

Act

Tender stage

1. Communication plan—who owns and who manages?
2. Governance for supplier invitations to tender and preparation of a non disclosure agreement (NDA).
3. At what stage will you share your template contract and expected terms and conditions?
4. What stages will be included; request for information, request for proposal, venues(s) for presentations—in person or virtual, such as Skype? Final meetings—what internal stakeholders need to be present?
5. Who from the suppliers' teams will it be critical to meet?
6. Is a budget required to cover the internal cost of the tender teams travel and expenses for presentations?
7. Include case studies to establish the technical content, methodology and innovation of suppliers?
8. Will an internal/external procurement technology system be used to manage tender responses/pricing grids?
9. What references are required and what stage? Clients and ex-clients? How do you validate the outputs?
10. Will feedback post tender be provided to both the successful and unsuccessful suppliers?

Notes

Notes

SANTA FE
RELOCATION

We enable people and organisations to work, live and thrive in new places around the world.

About Santa Fe Relocation

Santa Fe Relocation is a Global Mobility company specialising in managing and delivering high-quality relocation services worldwide. Our core competence is providing services that help corporations and their employees as well as individuals and their families to relocate and settle in new places. These services are delivered to a consistently high standard, locally and globally, and managed through our own operations around the world. Santa Fe Relocation is wholly owned by the Santa Fe Group, which is listed in the Nasdaq in Copenhagen, Denmark. For more information, visit us at **santaferelo.com**

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