

# Delivering Excellent Customer Service In Global Mobility – Insights From Old Mutual

**Delivering excellent customer service to employees when they move internationally can be challenging to achieve on a consistent basis given the complexity and interdependencies involved when moving employees overseas. Whether your business manages this activity by an in-house mobility team, or outsources this to a third party provider or leverages a combination of both, focussing on the following three areas can help deliver a great customer experience to your employees.**

## About Old Mutual

Old Mutual was founded in South Africa 170 years ago and provides investment, savings, insurance and banking services to more than 17 million customers in Africa, Asia, the Americas and Europe. We employ more than 61,500 people around the world and are listed on the London and Johannesburg stock exchanges.

We have a simple, focused strategy based on growing in our chosen markets where we have a competitive advantage. We are looking to build an African financial services champion, build the leading retail investment business in the UK, and grow our multi-boutique asset management business in the US. Our customers are at the heart of everything we do, so we aim to be their most trusted financial partner, helping them to achieve their financial goals.

## Mobility At Old Mutual

From a global mobility perspective we also look to keep our strategy simple and focused on the customer (the relocating employee and their family). Our mobility mission is to ensure we are able to move the right people, to the right place, at the right time, as effectively as possible, and to leverage mobility as a useful tool to help develop Talent and deliver business objectives. We have a small in-house team based in the UK and South Africa who manage 100 international transfers each year. Managing our global mobility effectively is a key part of the organisations strategy to ensure our continued success, providing a number of benefits to the organisation.

- It supports Old Mutual in achieving its business strategy (as we move employees internationally to growth and emerging markets)
- It makes life easier for our relocating employees. If we can transfer employees effectively it enables them to focus on achieving their business objectives without being distracted by issues created by the mobility process
- It provides great opportunities for our employees and can enhance employee engagement. Building a business where employees feel valued and have opportunities to live and work in other countries, broadening their skills and experiences can benefit both the employee and the business. Engaged employees contribute more of their capability leading to improved business results
- It also enables us to leverage our diversified workforce, both in generational terms and in relation to business expertise to transfer skills and knowledge around our businesses.

## Delivering Excellent Customer Service – 3 Key Areas Of Focus

### 1. Start with the Employee's Needs

The first step to making the employee feel valued and delivering excellent customer service is by taking the time to listen and understand their personal requirements and needs and then deliver to those specific needs. This extends beyond understanding their logistical requirements but understanding how they feel about the move. Is this their first move? Are they looking forward to it? Is their family on board with moving to a new country? Do they have any concerns? Asking some simple questions can provide a very useful insight into how the employee and their family are viewing the opportunity and what is important to them. By showing a genuine interest it demonstrates the organisation is equally invested in the process, and the necessary support structure is in place to achieve a successful outcome. Once you have a

good understanding of your employees requirements you can start delivering to those requirements.

### 2. Effective Communication

Establishing the protocols for effective communication is a key step in managing the relocation process smoothly:

- Make it clear from the start how the process will work, who will be contacting the employee and when
- If you are offering a high touch service or expect the employee to manage the move themselves, make it clear from the outset. Don't just manage their expectations; clearly establish them from the start
- Understand their preferred method of communication and be flexible to their requirements
- Understand when they like to be contacted
- Understand how they like information to be communicated. Do they like to have all the detail or simply prefer the headlines?
- Be responsive, agile and accessible
- Establish accurate timelines and stick to them
- Have a fix it first approach
- Nobody likes surprises. Keep the employee and all stakeholders updated and informed of what is going on
- Clearly define roles and make sure the employee is clear on who is responsible for each aspect of the move. With many elements of the process in the hands of decision makers outside the immediate control of the mobility team (for example, immigration or tax authorities), it can help to provide clarity to the employee so they understand what areas you can control and what areas you can't – either way you are likely to experience the impact
- Make sure whoever is interacting with your employees on a daily basis to facilitate their move is empowered to make quick decisions and agree employee requests without having to go through a lengthy approval process. Having a policy framework that has the flexibility to operate a consistent

policy but with the ability to tailor the package to fit the specific requirements of the employee can be beneficial

- If you have third party providers working directly with your employees, make sure they have a good understanding of your business culture and values to ensure they are aligned to how you like to do things
- Don't be afraid to request feedback on a regular basis and be open to make changes where improvements can be made.

### 3. Keep It Simple – It Makes Delivery Easier

It can be very useful to put yourself in the relocating employee's shoes and walk through the different steps in the relocation process the employee has to experience. Are they only doing tasks that are critical to the process? Is there any duplication where they are providing the same information more than once to different providers? Identify where the process can be simplified and the number of touch points streamlined to make the relocation process simpler and easier to navigate. What do you want the employee to feel and say after they have interacted with the mobility process? Was it easy?

Did they feel valued? Did the process work well? Look to shield the employee from the mundane and administrative tasks as much as possible to enable them to focus on the activities that add the most value to the organisation, namely doing their day job.

### Final Thoughts

The modern day mobility function has a number of competing priorities, tasks to deliver and stakeholders to keep happy. It can often feel like the focus is on everything other than the relocating employee and their family. It's also important to recognise that mobility functions have a number of customers to keep happy. Although in Old Mutual the relocating employee is our primary customer, we are very cognisant to the fact we have to balance the needs of the employee with the needs of the business to deliver cost effective solutions which are competitive.

Whatever approach you adopt to manage your relocating employees, keeping the employee at the heart of what you do can pay dividends. Focusing on these three key areas can help deliver excellent customer service making it a positive experience for both the employee and the organisation.



**Max Newbigging** is the Global Mobility Manager at the Old Mutual Group since May 2011. Max has worked in global mobility for over 15 years and has lived and worked in a number of locations including the UK, US and in Asia.

ISL has steered me in the right direction to help me choose what I'm going to do in the future.

Kyle, Grade 9  
ISL Surrey

Kyle joined the International School of London (ISL) Surrey from the United States and is currently completing the International Baccalaureate (IB) Middle Years Programme. This year he also developed and edited the school yearbook and played on the soccer team.

The ISL Schools in London, Surrey and Qatar integrate mother tongue and other languages into the IB curriculum, nurturing the global competencies critical for success at universities and the world of work. Although Kyle has not yet determined his future, ISL is giving him the foundation to turn his dreams into reality.

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