Effective Transformation In Global Mobility A Board Game Or A Puzzle?

In this new Report, we explore the opportunities and risks for Global Mobility professionals, as organisations transform their purpose, structures and roles. We've seen in our previous White Paper 'The future of work and the impact on Global Mobility' that organisations are going through unprecedented change, as they move through cycles of globalisation, and continue to evolve their future digital business models.

So, What Is New?

The evolution of the human resources profession over the past two decades and the impact of unprecedented change has required new ways of contributing to the organisational agenda. At a generalist level, the HR function has made progress to achieving greater commercial engagement as Allan Boroughs at Orion Partners[1] reflects on the evolution of HR models.

"What does all of this spell for the future of the HR operating model? Overall, our research suggests that HR has developed a greater commercial awareness and has invested heavily in an incremental 'professionalisation' of the function as a direct consequence of the Ulrich model.

However, there is a clear limit to the benefits to be derived from excellence in HR operations and it seems clear that the next ten years must bring an increasing focus on the commercial opportunities offered by effective talent management if HR is to deliver on its true potential".

Our findings highlight that business leaders are looking for human resources and Global Mobility professionals to refocus from compliance-based activities to support strategic initiatives in the areas of talent planning and innovation to drive employee engagement and employee experience acquired from international work arrangements.

Whether Global Mobility initiate transformation or these are imposed from board level, we explore the dynamics and wider considerations in selecting partners and suppliers through formalised selection and tendering processes. Depending on the scope and scale of this exercise, it is often a complex, resource sapping project and thus deserves robust preparation to determine with clarity, the desired outcomes, expectations and aspirations. If the goal is a win-win result for all concerned, investing in the right due diligence will pay dividends as the transformation evolves into a transformed service model. As an addendum, we provide a Checklist to support the transformation process.

How Do We Get There?

Realising the desired benefits from operating in a transformed Global Mobility environment is often comprised of a variety of factors. We explore in this Report, ways that organisations can improve the success rate of embedded new operational models that deliver success for all internal and external stakeholders.

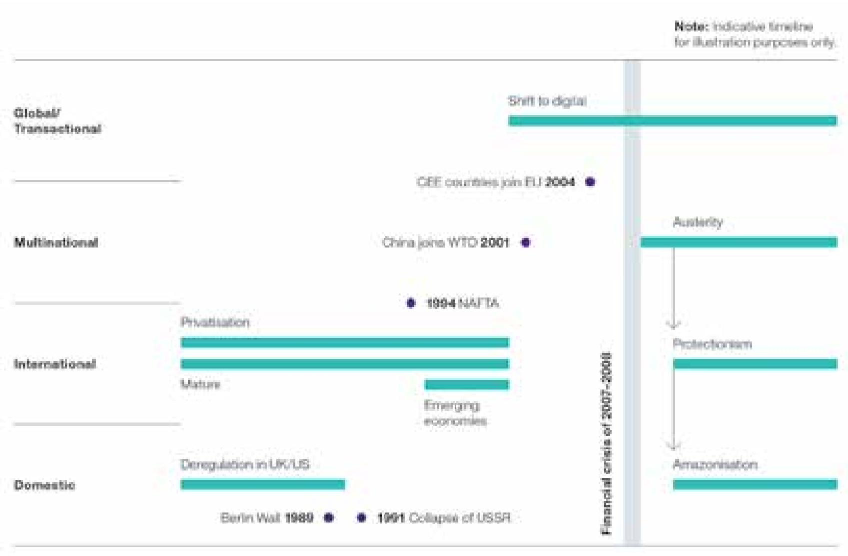
As organisations adapt to a continuously disrupted geopolitical environment, this organisational context is reflected in Fig. 1 (below): The future of work and the impact on Global Mobility (part one of two)[2]. Digitisation impacts not only the traditional industries.

The same can be said for the Global Mobility industry, where there are challenges to existing business models. While some services and markets may be better served by technology, others will more likely remain a balance of human and digital interventions. Employee experience and engagement equates to talent competitive advantage and what works for one generation, may not work for another. With five generations in the global workforce, satisfying their requirements is certainly no easy task and when the international work arrangements are overlaid, it is evident that creating a future-proofed Global Mobility team requires substantial due diligence.

The fusion of technologies that is blurring the lines between the physical, digital, and biological spheres in this fourth industrial revolution [Wikipedia] has allowed several regions of the world to be well placed to take advantage.

Using the Euler Hermes Enabling Digitalisation Index (EDI) 2018, which illustrates each country's ability to provide the necessary environment for business to succeed in an increasingly digitalised global economy, the US are on top of the 'digitagile' world, while Asia and Western Europe rank highly in their indices[3].

Fig. 1: Milestones impact globalisation



Ludovic Subran, Chief Economist at Euler Hermes provides a very succinct summary of the opportunities that lie ahead as we move towards the end of another decade: “Developing digital regulation, building human capital, using pivot sectors and territories, banking on smart logistics, and reducing digital inequalities are five successful strategies to top EDI ranking”.

The transformation of HR and Global Mobility roles: “We are the business”

The consequence of re-calibrating business models is the requirement to innovate and review the organisation’s capability to remain structured and agile. There will be pressure to undertake change for a variety of reasons; corporate cost optimisation initiatives, HR restructuring, changes in business and talent requirements and importantly a need to demonstrate more value using business analytics.

Supporting this perspective, a recent LinkedIn Interview by Adam Bryant Merryck & Co.[4] 22 October 2018 demonstrates the leading-edge thinking required by global HR leaders. Strategic CHRO: Leena Nair of Unilever on HR’s Role: “We are the Business”.

Q. What does being a strategic CHRO mean to you?

A. To me, there’s no other way to do this job than to be strategic. In order to be a good CHRO, you have to be ahead of the curve and thinking of changes before they happen. I get annoyed by all these articles that say HR is in service of the business. That’s such a regressive way of looking at it. We are the business.

HR should be leading the business to the right place instead of running behind the business and filling the cracks. HR has to be central, front-facing and literally lead the transformation of the business, because so much of what we do can impact culture and the right behaviours and mindset to take the company forward.

Q. What are the biggest challenges in your industry?

A. Everything about our sector is changing. There’s a huge fragmentation of consumers, and you can’t see them as one big mass entity anymore. Consumers are basically saying, “I want what I want when I want it and where I want it, and if I don’t get something I need on Amazon Prime in two hours, I’m already annoyed”.

It’s about thriving in an upside-down world. Everything we have believed about how work is done is being challenged.

Global Mobility: Evolutionary Journeys: Implementation Or Transformation?

The challenge for organisations is to really understand their desired outcomes as part of the transformation process. Whilst there may well be clarity at executive board level, the potential for diluting the vision increases as the mandate for change is cascaded through the organisation.

As an example of this, the Santa Fe Relocation 2018 Global Mobility Survey[5] results graphically illustrate a potential mismatch between executive’s perception of Global Mobility’s role and the actual role that mobility teams self-report.

Further considerations will typically include industry sector and the human resources organisation structure. The work of Professor David Ulrich[6] over the past two decades has seen many organisations with sufficient scale and global footprint implement some form of matrix HR Business Partnering model based on either business, product or geographic lines.

As this has been adopted and adapted over the past 20 years, Global Mobility teams have had diverse reporting lines, traditionally more anchored to reward centres of excellence and more laterally reporting into talent or VP HR generalist.

Global Mobility functions are increasingly coming under the spotlight to integrate into more strategic, talent advisory teams. While this has been widely reported, the rate of change and the achievement of successful integration depends on a variety of factors that we explore further in this Report.

Specifically, focusing on the future roles of Global Mobility professionals, Fig 4. on the next page, organisations with sufficient scale can

Fig. 2: What activities Global Mobility professionals currently spend their time on versus what they should spend their time on - a comparison between the views of Global Mobility professionals and business leaders

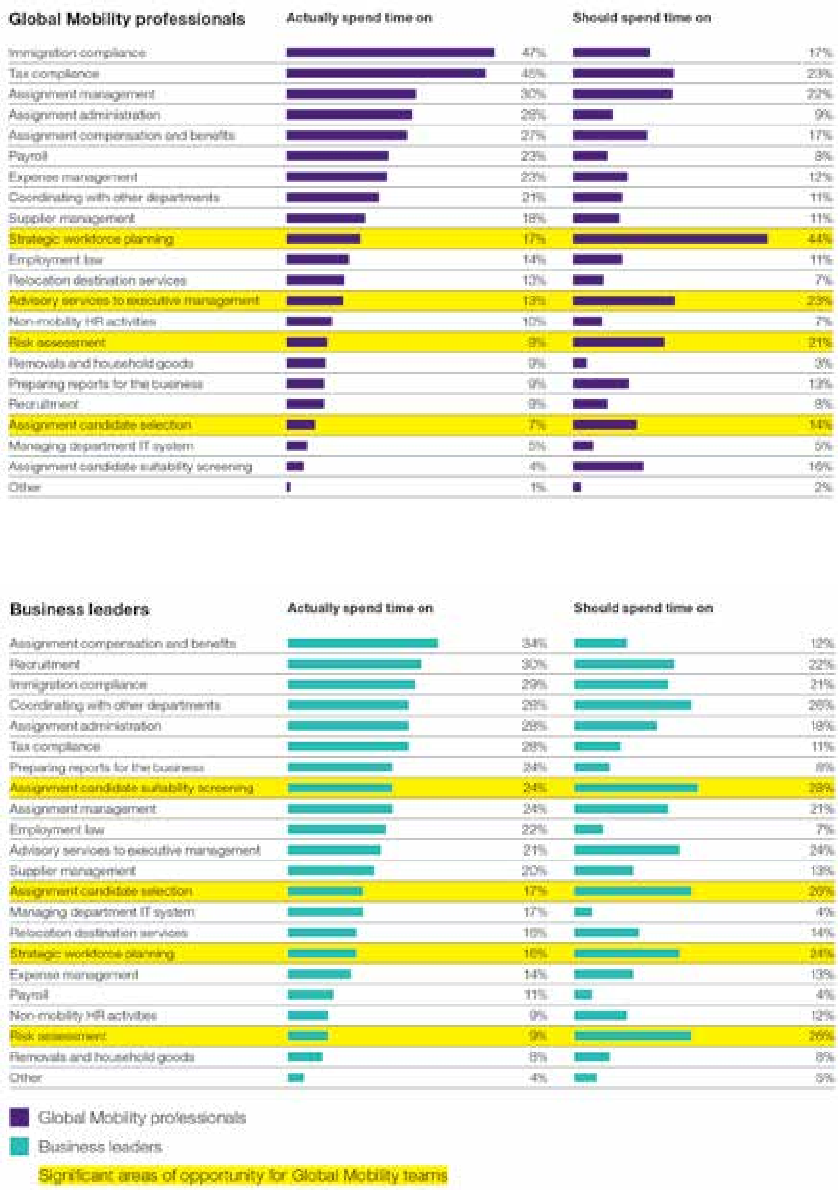


Fig. 3. An example of the classic Ulrich Model: Who does what?[7]

Business partners	Shared services	Centres of expertise
Establish relationships with customers—line/business units.	Deliver HR services.	Create HR frameworks.
Contribute to business unit plans.	Manage routine processes effectively and efficiently.	Develop and introduce strategic HR initiatives.
Develop organisational capabilities.	Often using a single HRIS, intranets to provide basic information and call centres for specific queries.	Specialised areas such as compensation and benefits, employee relations, L&D, talent management, OD, staffing, diversity and workforce planning.
Implement HR practices.	May be outsourced.	Often depend on the business partners to roll out programs to the business.
Represent central HR.	Back office.	
Log needs and coordinate HR services.		
Front office.		

Henley University of Reading: HR Models—Lessons from best practises 2009.

re-align the roles of the Global Mobility team with the activities that they must deliver internally (which may be all or in part, for example, strategic adviser and global talent manager).

Where organisations have scale, then the 'SAFE' model becomes easier to implement, assuming existing employees have the required skill-sets and competencies. Other organisations are using this type of framework to decide what should be their internal core competency and what could be better delivered by an external supply-chain partner(s)?

Global Mobility Transformation - A Board Game Or A Puzzle?

Increasingly, taking into consideration the impact of organisational restructuring and the need for Global Mobility teams to become more engaged in value-based activities highlighted in Fig. 3. and Fig. 4., the net result is likely to be a call to action for business transformation in the internal role of Global Mobility professionals. As organisations move toward agile, lean structures, there is likely to be more reliance on flexible mobility models, reducing fixed internal overhead costs and partnering with external supply-chain specialism to mobilise the internationally mobile workforce.

When implementing an Ulrich model into mobility service delivery, many organisations combine an HR transformation with implementing an outsourced service delivery model. This shift has created many challenges in organisations, and a fair percentage of outsourcing arrangements end up being brought back in-house within a generation of HR leadership change. Our practical experience over the past decade of what differentiates the successful from the unsuccessful suggests that the number one critical success factor is the clarity over whether the primary organisation focus is to outsource a process through a project-managed implementation or is intended to be a strategic business transformation.

Fix And Shift Or Shift And Fix?

If on the other hand, the prime business driver behind the outsourcing process is a current state based on minimal policy/process infrastructure or sub-optimal delivery of Global Mobility services, it is possibly, a risk-laden path to go to market to outsource internal issues in the expectation of an immediate panacea to the current problems - whether they be risk, compliance, governance, employee experience or lack of internal skills to effectively manage internationally mobile employees.

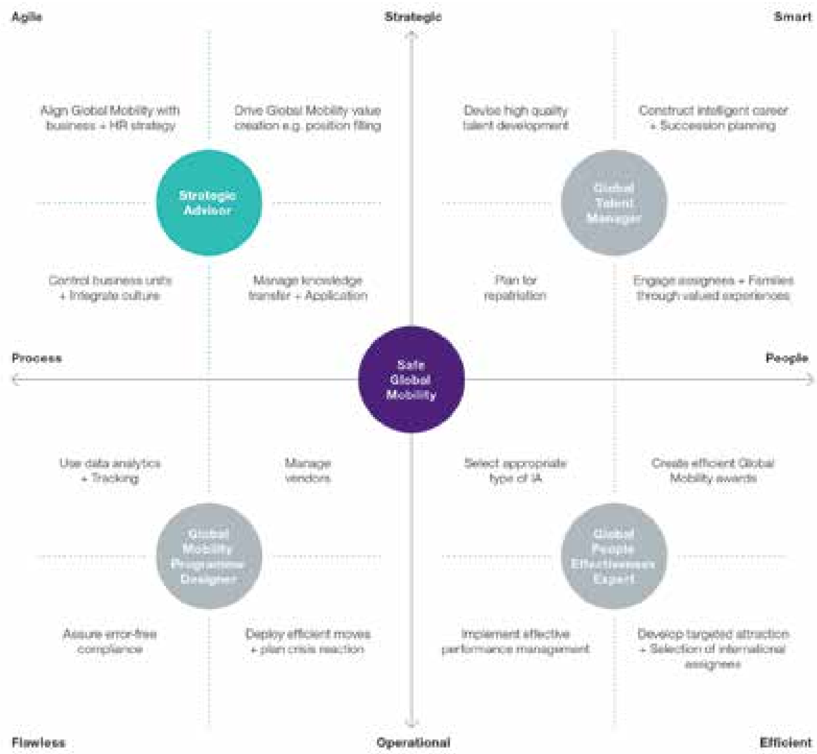
Whilst a bidding supplier may be aspirational to win the tender, promising a full implementation in a short-scale to 'fix the problems' could potentially be folly for all stakeholders.

Global Mobility Implementation

Implementation: 'The process of putting a decision or plan into effect; execution'.

To make this crystal clear, outsourcing a programme that has issues with governance,

Fig. 4. The RES Forum 2018 Annual Report: Safe roles of Global Mobility: Agile - Living the purpose and increasing value[8]



Note: Reproduced with the permission of The RES Forum in association with Cranfield University.

compliance, policy or process failures (or indeed starting with nothing in place) and expecting the preferred suppliers to implement is likely to involve a protracted time to effectively build or re-design the programme onto a supplier's operating platform (service model and technology et al.). This is effectively shifting programme issues with an expectation they will be resolved, where in reality it is only displacing them without resolution.

Implementations typically involve replicating or migrating processes that would have been delivered in a certain way, for example, by an internal Global Mobility team. This may also be the case, when an organisation has already gone through outsourcing but decides to change providers. This is primarily a project management exercise, as the change protocols would have been managed in the original transformation.

Where the transformation has already taken place and an external supply-chain extended to full or enhanced Global Mobility outsourcing, the process of changing an external partner is more likely to require an implementation process, possibly with some re-configuration for technological or scope change such as outsourcing expense management.

Global Mobility Transformation

Transformation: 'Business transformation is a change management strategy which can be defined as any shift, realignment or fundamental change in business operations. The aim is to make changes to processes, people or systems (technology) to better align the company with its business strategy and vision'.

Any potential transformation will likely involve new roles and workflows and an expectation of enhanced management information reporting when partnering with new external supply-chain. Transformation also requires bravery in some cases, as the transformation may have on-going repercussions from 'veteran' international assignees who are savvy at navigating policies and the workflows. This is why effective stakeholder engagement and ownership are key at the earliest stages - acquiescing to demands for exceptions can impinge on the long-term goals of the transformation.

As much as robust communication planning can alleviate concerns and preconceived bias, there will always be dynamics that will impact any transformation especially where accountabilities and roles are re-allocated.

- In parallel, there may be other major projects being considered such as implementing a new global HRIS platform that will require many of the same stakeholders to invest their time on that too
- Effective transformation requires;
  - Thorough due diligence
  - Realistic resource/time planning
  - Stakeholder engagement (especially in decentralised environments)
  - Robust governance.

These principles are critical in ensuring that the original executive leadership outcomes are delivered not only as an immediate short-term outcomes solution but also ones which are sustainable over a period of years.

Balancing Transformation Ownership: HR Or Procurement?

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A Strategic Procurement Definition[9]

Strategic sourcing is an institutional procurement process that continuously improves and re-evaluates the purchasing activities of a company. Modern supply chain management professionals have placed emphasis on defining the distinct differences between strategic sourcing and procurement.

Strategic sourcing focused more on the effectiveness and sustainability of supply-chain, whereas procurement has traditionally focused more on cost optimisation of the supply-chain. It seems therefore, that a balance of the two approaches are relevant for partnering in Global Mobility transformation.

While there should be an expectation that both the procurement and HR (Global Mobility) teams will have aligned objectives and outcomes, there are several factors for consideration such as understanding of the function (both scale and scope).

Many organisations have procurement functions adept at managing professional service tenders. However, some do not, and a common mistake is to apply the same methodology to choosing an outsourced mobility service provider as would be applied to the purchase of headlight bulbs for SUVs. The wrong bulbs will need replacing, but one top brand will work similarly to another. The risk, governance, and engagement of your assignee population is impacted by buying the wrong mobility service, and service delivery models are never like-for-like.

Thus, the transformation journey starts long before any partner(s) have been chosen and successful transformation requires substantial resource investment to ensure that the desired outcomes, that may have filtered down from the executive board, remain aligned with the strategic objectives. At the end of this Report, we provide a Checklist for transformation planning.

Effective Due Diligence, Prior To Formal Tendering: A Wise Investment

Meeting with potential suppliers before embarking on a Request For Proposal (RFP/tender) is likely to be of more value than inviting numerous suppliers to submit tenders without having met with them. Having a simple Request For Information (RFI) as a preliminary stage will enable providers to understand what is available.

This simple step is often omitted in transformations, and the ability to use the considerable experience of vendors who have advised other customers on similar transformations is lost or overlooked. An RFI before the transformation is started allows the potential providers to provide some input to the final outcome, potentially saving time and money later, whether just by reducing the number of RFPs that need to be screened, or by avoiding expensive mistakes that competitors have made in implementation.

Without exception, organisational culture is key to creating competitive talent advantage through highly engaged employees, and if the organisation is looking to outsource some of the employee experience to an external organisation, then culture fit must be high on the 'must haves' partner evaluation agenda.

Having informed 'due diligence' meetings with long-list suppliers, which then whittles down to a short list of a maximum of four potential partners with clarity on scope, operational, geographical and technological capabilities, ensures that the initial time investment is returned in full by having a

Fig. 5. Discovery framework to establish an enhanced knowledge base, pre-tender

	Known to client	Not Known to client
Known to others	**Arena** Programme size. Geographical spread. Headquarter suppliers.	**Blind spot** Variance in invoicing against agreed scope/pricing. Loyalty based on legacy. External suppliers have changed their business model and service scope.
Not known to others	**Hidden area or facade** 'Drowning'. Compliance issues. Business 'noise'.	**Unknown** Value of partnering. 'Internal politics'. 'C' suite relationships fraud.

clear vision of what to expect partnering in a transformation, most likely for a period of several years. One of the biggest challenges in tender evaluations is making sure that in scope and pricing terms, it is like for like and not 'apples and pears' pricing comparisons, and suppliers are transparent regarding any commissions or referrals received from their own supply-chain.

In Fig. 5., drawn from the Johari Model[10], we highlight the relationship dynamics in establishing a full current state of the Global Mobility programme. Dependent upon the engagement with external suppliers and remaining objective to all ideas, there may be insights and discoveries that could re-frame the tender process.

The client - supplier relationship can often be like a puzzle, where both sides have data and knowledge that both may jointly have and some which becomes available through objective and collaborative discussions.

Arena - both organisation and supplier have factual data about the internationally mobile employee demographics, locations and even some visibility of up-coming projects.

Blind spot - the client may not have full vision of the supply-chain pricing, especially in decentralised operational models, have allegiances to one or more suppliers through longevity rather than value creation or dismiss potential value-creator suppliers through perceived past rather than current factual knowledge of their capabilities.

Hidden area or facade - there may be important factors that if shared, could enable either more rapid or enhanced solution delivery, for example, the client may need temporary resourcing support to manage an unexpected surge in relocations for a group move or project that has been undisclosed for commercial reasons.

Unknown - there could be a variety of factors that could be significant to the transformation for the organisation and prospective suppliers. By having a more transparent discussion during the tendering process, important capabilities that the supplier could deliver may be over-looked in a desire to keep to a predetermined scope agenda. Or, in the case of decentralised mobility service models, a lack of governance resulting in compliance breaches, could impact the success of the transformation.

Transformation therefore, is effectively a board game in which the Executive leadership seek continual advantage through leading practices and lean operating structures and the cascade process to effect change often requires a 'jigsaw puzzle' approach to ensure the future puzzle picture has the right shapes and pieces!

Building A Winning Tender Team

These activities potentially have differing goals but successful planning can align these better.

Procurement - are likely to focus on managing risk, negotiating deals that demonstrate some form of cost reductions and validation of the quality and sustainability of the preferred supply-chain partner(s) and a scorecard that requires demonstrable value innovation or often just cost saving.

Strategic sourcing - clearly has a role in the transformation and while it is recognised that supplier fees need to be cost optimal, it is also important to adopt a more holistic approach to partnering. Would an FMCG (Fast Moving Consumer Goods) source a supplier that they know will not be sustainable due to the terms of the contract? Full transparency has more bearing in the negotiations than merely focusing on pricing rather than the desired employee experience and strategic change drivers.

Global Mobility - may share these objectives, but place more weighting on the inter-personal dimensions of who may become their new partner. If the mobility programme is currently managed regionally or even by a country/business unit - there may be multiple 'must-have' partners, which will require objective assessment criteria to make final choices.

Technology - underpinning transformation and understanding how this could integrate with existing internal systems, reporting and enhancing transparency of work flows needs to be considered. If the transformation involves multiple external partners, will these enable one point of data consolidation?

Governance/compliance - establishing legal and finance interests in the tender process are important in understanding important contractual and broader fiscal implications.

Establishing A Holistic Approach

The Mobility Survey highlights that only 37% of respondents articulate their total programme costs.

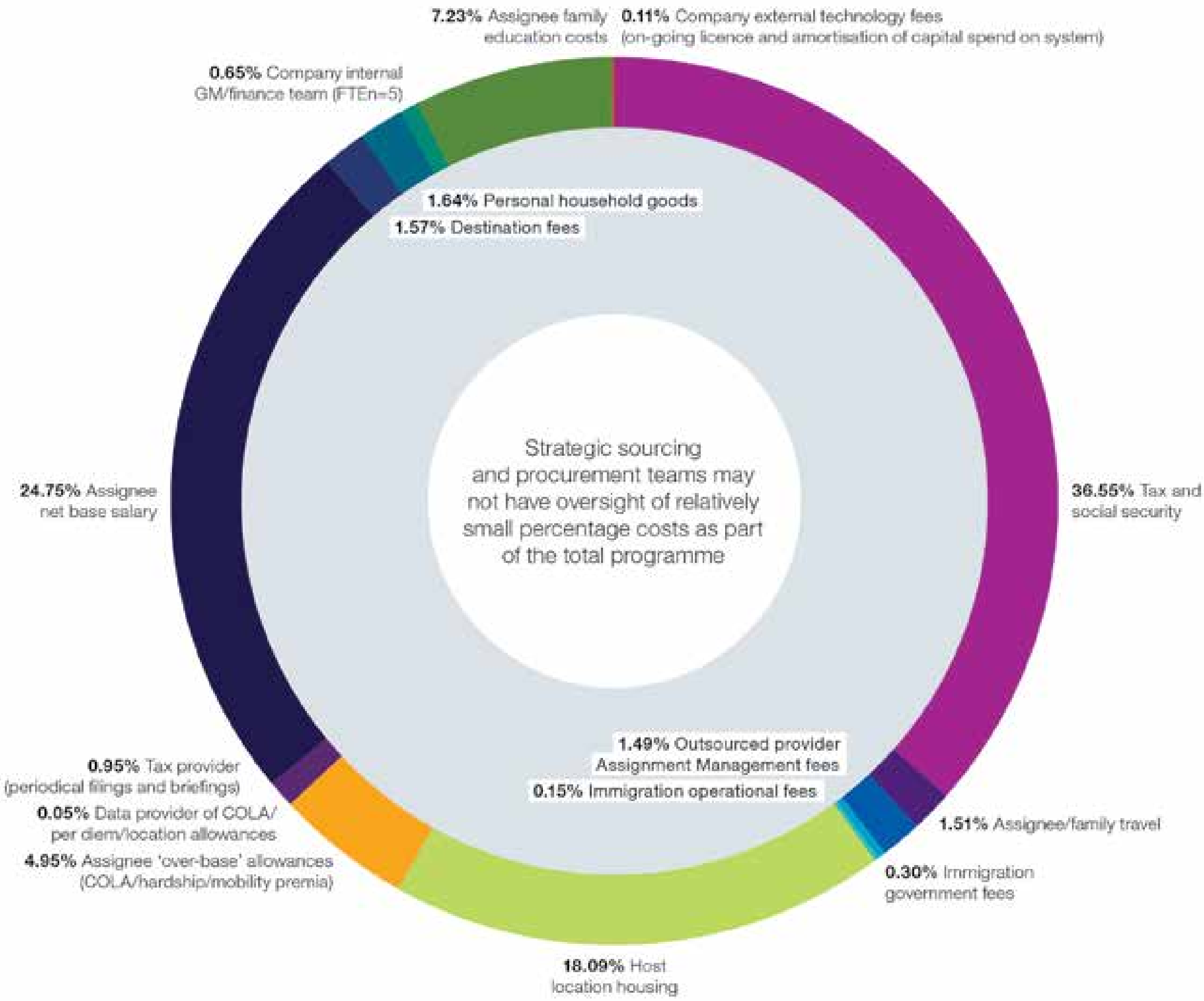
While external supplier pricing will be a significant decision-making factor, it is noteworthy that procurement teams may be unaware that in a fully outsourced Global Mobility transformation, the suppliers' assignment management fees are likely to represent between 1% to 3% of the total global programme costs. Focusing on one or two cost elements in the transformation of a Global Mobility programme may be appropriate, especially for the procurement team, but recognising the relative cost of the services as a percentage of the total provides more context.

In Fig. 6. on the next page, we provide an example of a total programme cost model. Transformations must therefore be cost effective, but surely the focus should be more on creating competitive advantage through engaged talent undertaking all forms of internationally mobile work arrangements? With a typical population of assignees on salaries of €60-100,000 going on a two to three-year assignment, with the total cost close to an industry standard of 2-3 times base salary, the assignment can cost anything from €250,000 to €1m plus. Spending excessive procurement time reducing the outsourced mobility vendor's fees down from 0.5% of that total to 0.45% of the total may look like a 10% saving from procurement's scorecard, but if the assignee has their concentration and focus in their new job compromised for even half a day, all of that saving and more has been lost.

Conclusion

Organisations are evolving and so too are business expectations of their professionals, and increasingly organisations will shift from functions to roles, and whilst the rate of change will be differential, the end game is

Fig. 6. Example of a traditional long-term assignment programme - total cost model



that robotisation and expectations of value creators rather than facilitators will be the mission and purpose of those employed inside the organisation.

Therefore, the evolution of assessing the right cultural and technical supply-chain fit is critical. The views and models we have referenced affirm the direction of travel for professionals - and this equally applies to others in finance, procurement, marketing and so forth. The digitalised world requires one to re-learn how to thrive and grow in this fourth industrial age.

A large-scale tendering process can take a year to achieve the final decision, another six months undergoing transitionary activities and if, after 'go live' the operational model, service capabilities, pricing or some other significant dimension fail, will there be an audit trail as to why this occurred? If the transformation is desired over the long-term, there is a pitfall in expecting instant gratification and overlook that partnership is evolutionary?

Global Mobility Professionals

- Global Mobility and human resources teams should invest time in understanding their future role expectation - being strategic and tactical at the same time is unlikely to be a workable solution and importantly what contribution does the business expect from Global Mobility, post transformation? Will this require investment in acquiring new skills and competencies - for example, in strategic and talent advisory consultancy?
- Establish clarity on how Global Mobility fits into the broader transformed organisation - has this been communicated and agreed with internal key stakeholders in the business? Post transformation, the business needs to be clear on how and why the focus existing internal Global Mobility role has changed
- Taking time to seek the views of both suppliers, the business/line management and other industry peers before embarking on a formalised tender process will assist in debunking 'myths, rumours and preconceived views' and provide a strong platform for asking the right questions and assessing the right combination of culture, people, process and technology that will build, from day one, the foundations of a successful transformation
- Scope - operational consistency offered by a supplier may also mean inflexibility and charging for every extra request. Ideally, the new partnership will have sufficient trust and governance for a mature approach from both parties to agree when additional fees for new services or project fall outside of the contract
- Transformation or implementation? As we have explored, clarity and honesty by all parties on the realistic outcomes and over what timescales
- Success for everyone - entering a new partner relationship(s) will involve some level of bedding in the processes, workflows and preferred operational approach - this is a long-term investment

not a short-term gain, although an effective transformation should yield dividends at an early stage
- Communicating value to the business from the transformation ensures momentum behind the change process - whether it is improved reporting, enhanced satisfaction from relocating employees, or releasing time for Global Mobility teams to focus on their new organisational roles.

Sourcing/Procurement

- Taking time to fully understand the current and future state of the Global Mobility contribution is key to supporting the selection of sustainable Global Mobility suppliers. If Global Mobility/professional services are exceptional projects for the procurement function, seeking to negotiate predominantly on price and volumes, misses the opportunity to understand the complexity of services, regional variations, available technology and competitive advantages of Global Mobility programmes
- Pricing - be aware of the relativities of the services being procured within the total programme costs. Selecting the right partner who is sustainable must be the priority, and while pricing will be market competitive, why would any organisation expect their suppliers to operate on unsustainable margins? If this is case, how will quality of service be delivered? The Global Mobility industry has gone through waves of maturity and with technology and the availability of suppliers across the continuum, the days of opportunistic pricing in some areas of Global Mobility have not completely disappeared, however, they are now the exception to the norm. Therefore, any tendering process needs full planning and education for all parties.

We are living in a world of unprecedented change and uncertainty that is stimulating organisations to re-think their purpose and contribution. Technology forms an unrelenting catalyst for change and redefinition of how we thrive and survive in a new world order - the fourth industrial revolution.

As employees across five generations come to grips with their new work/life expectations, Global Mobility continues to become an ever-important dimension of how organisations remain vital. Equally, the Global Mobility and HR professionals are faced with changing roles and changing rules both internally from their leadership and externally as governments tighten legislation to filter immigration, capture non-compliance for breaches covering employment and taxation legislation.

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