Making Your Global Mobility Data Work For You

With improvements and movements in technology, many Global Mobility functions are starting to explore whether data could be made to work a little harder and whether some of the, previously accepted, time-consuming manual routines required to collate and use operational data, could be removed altogether.

Global Mobility uses a great deal of data to perform its day-to-day functions for the business. This encompasses basic assignee demographic data like dates of birth, addresses and assignment lengths, through salary and compensation details, to assignees' details of involvement in equity plans and bonuses.

This data can be housed in various company systems, in different parts of the business and often across different countries. With improvements and movements in technology, many Global Mobility functions are starting to explore whether this data could be made to work a little harder, and whether some of the previously accepted routine, manual work, could be removed altogether.

In particular, the focus is on two main areas:

• Firstly, efficiencies in recycling data for business-as-usual processes. That is, effectively, taking data from one system to another, or sending it internally, or to providers, without manual intervention and duplicating efforts;

For example, companies are looking at assignment initiation processes. How can the necessary data be collected efficiently to initiate the assignment, and each of the vendors involved, in getting an assignment in place? Other areas for efficiency are the monthly payroll notification process and the annual compensation data collection process for income tax return preparation. Automation can allow the business to focus on the exceptions rather than manually working through reconciliation

• Secondly, using the available data to provide greater value, such as providing useful strategic insights and feedback to the business.

Collecting and aggregating assignee data allows the company to apply data analytics techniques to produce very useful insights including total Global Mobility programme costs (with breakdowns by country, region, business area, etc.), dynamics in assignee patterns, and assignment policy types. It also allows for some very practical resource planning, such as the variance of new assignments with external factors such as economic cycles, product demand/prices (and by extrapolation the necessary size of the Global Mobility function to cope)! The right tooling allows Global Mobility to analyse the efficiencies of its policies and the impact of making changes.

So, how can all this value be recognised by the Global Mobility function? In simple terms, it takes the form of a "data hub" - a platform which receives feeds from the different systems which hold data relevant to international assignees, organises and reconciles that data, and then has the ability to send that data out to authorised recipients.

A few years ago this type of model might have seemed like something from the future, but the pace of modern technology means that the future is already here, and it is now possible to set up this type of platform relatively efficiently and cheaply.

In starting to investigate how this type of model might be approached within an organisation, a feasibility project might include the following steps:

1. Ask questions about the primary goals you would like to address. Which operational activities would benefit from automation and improvement? Do you want to track how well your providers are meeting their service agreements? Is the most important thing understanding the total spend across all assignment programmes? What data sets would help you address this?

2. Identify the types of data which are used for many purposes in your day-to-day Global Mobility operations and therefore would be the most useful to collect for operational purposes.

3. Identify the 'sources of truth' – which of your systems hold the most accurate records of each item of data. For example, primary records of salary information may be held in the ERP system. The same data may also be held in the Assignment Management system, but this may be a secondary record keyed in manually. In some cases the 'source of truth' may be a provider system that captures more detailed data than is held in your ERP: share plan, immigration, relocation, and payroll.

4. Identify the best way to obtain the data from the system on a regular basis – is this by report generation (e.g. in an Excel or CSV format) or can you use something even more efficient like a web service. What is the best frequency to obtain this data? Automation will mean that more regular frequencies become feasible.

5. Once this data has been pulled from the appropriate systems, where will you store it? In a new database or provider system?

Pulling data from various systems (Step 4 above) has never been easier. For instance:

• A standard approach would be to leverage integration technologies such as web services and secure file transfer to capture data efficiently and accurately. A "data pump" pattern can be used to keep data fully up-to-date by triggering synchronisation when data is added or changed in the primary database

• Robotics technology allows for multi-system repetitive processes to be automated easily. For example, where a team member opens one application (e.g. the ERP system), runs a report, saves down a file and then runs a macro producing another report which is uploaded to a new system (e.g. the data hub). Such a process can be automated and scheduled to run before work hours so it can be checked by a team member at the start of the working day. A robot can bridge the gap where a report does not exist to extract all information required and emulate a user extracting data from multiple screens. These kinds of activities may have been too resource intensive to consider

• "Data wrangling" technology allows
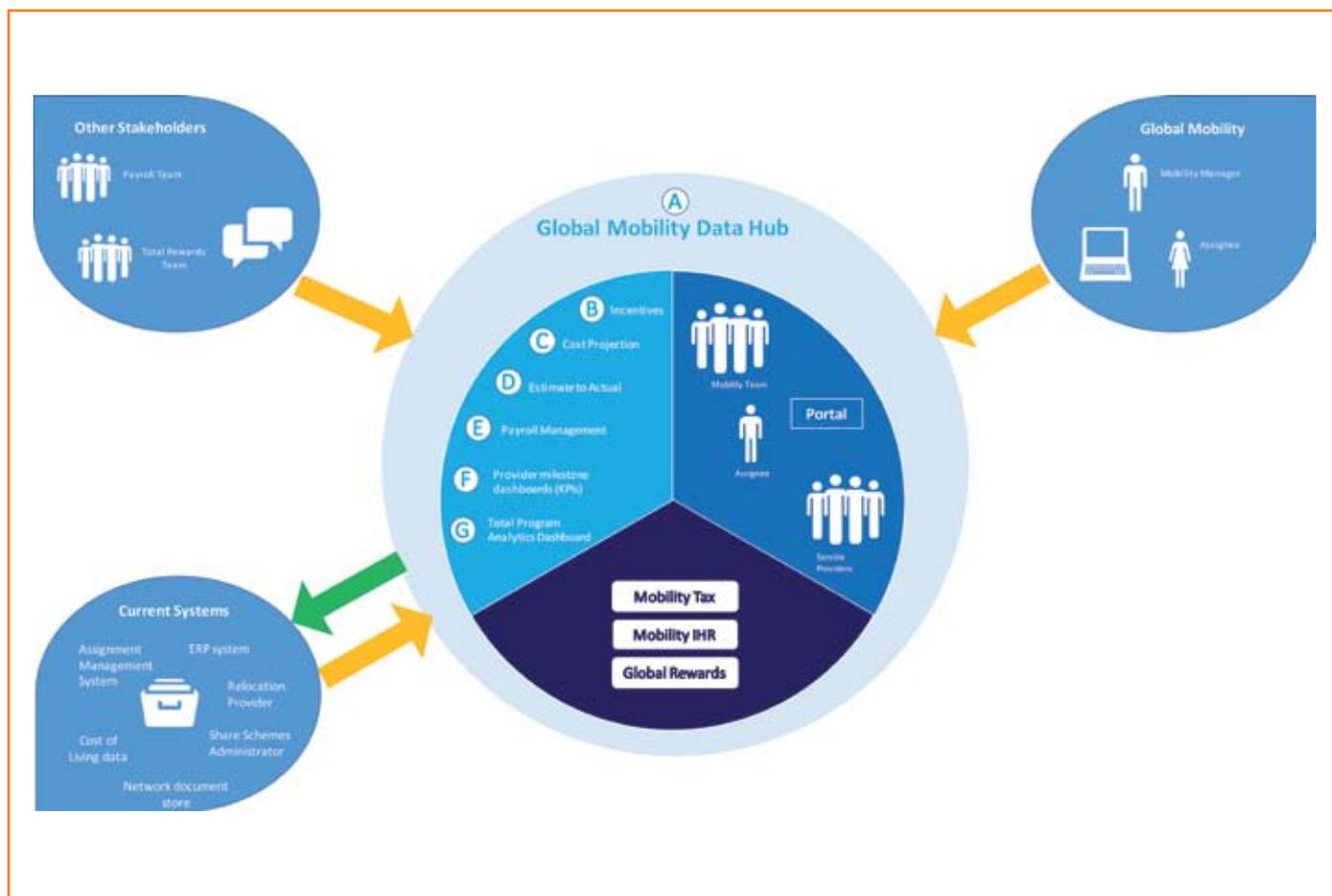
data which is only available in fixed formats such as PDFs, to be managed into more malleable forms such as Excel, for manipulation into alternative formats. Again, the aim would be to turn the data into a format which could be uploaded into the data hub.

Once the data is in the hub, it can be recycled and used to achieve a variety of different goals:

- It can be used for any number of operational activities, with standard repetitive tasks automated by using one of the techniques used to transfer the data into the hub
- It can be used to feed visualisation software producing dashboards which can show data in a three-dimensional interactive format. The limits of the dashboard reporting are only limited by the data sets available
- It can be used to produce ad-hoc reports across the entire Global Mobility programme where this would previously have required commissioning a project to gather intelligence from multiple internal and provider systems
- It can be used to drive continuous improvement with hard data. For example, evaluating the efficiency of using different providers for different

parts of the business

- It can be used to update the Assignment Management system to ensure that contains the most up-to-date versions of 'the truth' from the various systems which contain primary records
- It can be used to analyse data consistency and quality between systems. This process may identify efficiencies that could be applied by synchronising data from the 'source of truth' to other systems that house the same data.

Of course, these projects are not without their challenges and there are a number of issues for Global Mobility teams to overcome before embarking. Some of the most common are listed below:

- Access to technology resources within the business or from specialist consultants or service providers
- Access to the data and systems themselves – clearly, the data required is personally identifiable information and therefore is rightly guarded sensitively by the corporate security teams
- The state of the original data is key – you have to be able to rely on and trust the state of the data held in the primary systems. For example, duplicated data or, worse, inconsistent data received from different systems could lead

to problems unless some form of reconciliation is performed.

While some of these challenges may appear daunting, this is an area of great opportunity, particularly for complex functions like Global Mobility. There are many resources available to help you on your technology journey. As mentioned above, processes and technologies exist that make these goals easier to reach than ever before.

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