M&As: How Talent Mobility Helps Drive Success

With all the global geopolitical, regulatory, trade and economic ups and downs shaping business decisions right now, it's hard to choose just one workforce-related topic to explore. In fact, maybe it's time we all agree that this roller coaster ride is our new norm, and nuanced challenges will be present at every climb, dip, twist and turn.

But that doesn't mean we can't or shouldn't be ready – or at least attempt to enjoy the thrill of the ride. With that in mind, let's look at what's happening in the world of mergers and acquisitions (M&As) – and what global mobility professionals can do to support success. The goal here is to equip everybody to get on board with confidence and avoid that terrified, white-knuckle grip on the safety bar.

First, Some Market Perspective

Regional and industry sector data reports vary, but multiple sources show that for the most part, global M&A volumes are generally down or flat from what was initially predicted for 2025, while values are up, particularly in the US and APAC. Figures may be inflated by "megadeals" – or those transactions valued at US$10 billion or more – but it's an interesting trend to note, as business leaders and private equity (PE) firms may be more focused now on much bigger deals that can yield longer-term gains.

Despite the chaotic news of on-again, off-again tariffs coming from the United States, and global financial markets' reactions, business leaders know that to survive and grow, they must stay focused on transformation. The current conditions arguably make valuation harder, but AI's advancements in data review and predictive analytics are significantly bolstering dealmakers' ability to source and prioritise their best targets, and facilitate the due diligence and integration processes.

Key Considerations For Workforce Mobility

What does all this mean for HR and global mobility professionals? With so much at stake, it's critical that we are equipped to handle the talent ramifications with thoughtful planning and communications that are as transparent as possible. At a time of great disruption and employee unease, it's essential to have a strategy for not only how you will handle differences across benefits, allowances and compliance risks, but also how you will address employee reallocation and satisfaction while minimising critical talent flight.

> C-Suite, HR and other business line leaders need to work closely together on establishing the integration and communication plans, talent retention and attrition goals and how to identify and address duplication of skills or roles

C-Suite, HR and other business line leaders need to work closely together on establishing the integration and communication plans, talent retention and attrition goals and how to identify and address duplication of skills or roles. Here are a few of the essential workforce mobility-related things to consider if your organisation is engaging in M&A activities:

1. **Relocation policies and service providers.** As with any of your other employee benefits, it's likely that each company will have its own approach to relocation policy, shaped by workforce priorities, company culture, budgets, regional operations and employee demographics. Multiple different mobility providers and management teams may also be currently providing relocation support. Conduct a comprehensive relocation audit to help you assess:
   - The number and types of policies across the organisations
   - The current overall relocation budget
   - The status and locations of all current, in-flight and planned moves
   - A catalogue of all service providers. Decide on a standard set of criteria or a scorecard approach for how you will capture consistent data on their capabilities, technology solutions and performance scores
   - All existing contracts and terms
   - Who will ultimately make relocation-related decisions going forward.

Once you have a clear understanding of the mobility landscape, you can make informed decisions about the next steps, including when and how to communicate with your employees and service providers, grandfathering in affected associates, timelines and processes for merging benefits or suppliers, and any re-negotiations you want to consider. Harmonising benefits can be especially challenging if you have multiple global assignees at different levels, with complex compensation and pension packages across a wide range of locations with varying reciprocal agreements. Complete visibility and careful planning are essential ingredients for success.

It may be tempting to default to the more generous policies or the provider serving the larger of the two organisations/mobility programmes. But the same due diligence that led to the merger in the first place is needed here, too. It's important to truly understand pricing models, where providers excel and where there may be potential gaps in services or geographic reach.

Given that these are generally times of major upheaval and change, a phased-in approach typically works best, avoiding mid-stream disruptions wherever possible. Finally, take the time to document your findings and decisions – not just on the financial or performance metrics, but on the cultural or philosophical priorities that shaped them. This will help you demonstrate that you've genuinely attempted to honour the values and employees of both organisations.

2. **Talent and project plan mapping to determine how relocation teams can best support reallocation of skills or enhance geographic strengths.** Mergers inevitably create duplicate roles across similar functions. However, blending companies and reallocating talent requires strategic thinking that goes far beyond mere reductions in force. The goal is to optimise your workforce while retaining valuable expertise and maintaining business continuity.

Just as with the relocation audit, a comprehensive talent mapping exercise across both organisations will help you identify similar roles, skillsets and performance assessments. It requires a significant investment of time and resources, however, so it needs to be carefully planned, and involve team members with the right skills from both organisations. When done well, it can help you fully understand what skills you have where, and assist with possible future immigration and movement eligibility insights. High-performing employees in duplicate roles might be perfect candidates for expansion into new markets or specialised functions.

Mergers can also create unique opportunities to optimise talent distribution across geographic locations. You might discover one company has stronger talent in certain regions while the other has better infrastructure in different ones. Or, an accountant in New York might be redundant from an org chart perspective, but their local knowledge and client relationships could be invaluable for operations in another location.

Consider developing compelling alternative roles for high-value employees facing redundancy. This might include lateral moves to growth areas, project leadership opportunities, or international assignments. The key is to present these changes as career advancement opportunities.

Successful talent reallocation requires exceptional change management and communication. Employees facing potential relocation need clear information about their options, timelines, and the support available.

Develop individualised communication strategies for different employee groups. High-potential employees might receive one-on-one career counselling, for example, while broader groups may benefit from town hall meetings and FAQ resources.

Develop individualised communication strategies for different employee groups

3. **Technology integration.** Major differences in technology can wreak operational havoc during mergers. Placing a priority on systems integrations early on can help you avoid manual workarounds that can cause significant delays, or increase your costs and risks for errors. Be mindful of the information you'll need to retain from both organisations for compliance records and year-over-year activity and cost data.

4. **Extended business travel (EBT).** As companies integrate operations and share expertise across locations, it's highly likely that multiple team members will be frequently travelling before, during and after the transaction is complete. It's worth considering whether you need a dedicated EBT plan to help you properly manage, classify and monitor all activity directly related to the merger. The time spent in each location and the types of work performed are critical to track. Your tax provider can help you educate your stakeholders on the risks of triggering residency or PE status and how to document all activities appropriately.

5. **Success metrics.** How you assess the success of your relocation programme integration following a merger might look a little different from some of the more typical measurements HR and global mobility teams might use. Things like employee engagement, morale and job satisfaction can be heavily skewed during the upheaval of a merger. In these unique circumstances, it might be best to assess progress by tracking things like productivity, retention, business continuity, preservation of high-potential employees through reallocation and talent mobility's contributions to profitability.

Moving Forward With Confidence

There's no doubt that mergers and acquisitions present complex challenges for relocation professionals, but they also create opportunities to build stronger, more efficient programmes. Success requires strategic thinking, careful planning, and flawless execution across policy alignment, service partner management, extended business travel oversight, and talent reallocation.

Position relocation not as a cost centre to be minimised but as a strategic capability that enables business transformation. When employees feel supported during transitions, they become advocates for change, and when policies are fair and consistently applied, they build trust across the newly merged organisation.

The key is to start your merger relocation planning early, involve stakeholders across all functions, and maintain focus on both business objectives and employee experience. With proper attention to these critical areas, you can position your organisation for integration success while building a foundation for future growth – and hopefully enjoy the ride!

KRISTIN WHITE
Kristin White is Director, Communications & Thought Leadership with global relocation management company, Sterling Lexicon. She has more than 30 years of experience in the workforce mobility industry, including several as an expatriate.
She can be reached at:
kristin.white@sterlinglexicon.com.