

Forging the Path

Mobility PathBuilder Guidebook

A roadmap to advance your Mobility efforts.

GRAEBEL[®]

Here's to the world ahead.[®]

Introduction

In global business, Mobility has too long been charged only with the task of moving people from point A to B with the least amount of disruption and angst.

As such, Mobility is usually considered a cost rather than an investment — even an afterthought.

It is rarely perceived as something that can improve work processes. A magnet to recruit and keep better employees. A company's differentiator and a genuine competitive advantage.

For all its potential, Mobility is seldom invited to take a seat at the strategic table. Alongside Finance. And Operations. And Sales. And various other perceived profit centers.



But what would happen if management were able to understand, and appreciate, the tangible value of your Mobility enterprise? What if the benefits were better presented? What if you settled for nothing short of empowering your company's human capital — millennials and baby boomers alike?

What if you could open an exciting, profitable future for your entire organization?

Where would you start?

On the following pages, you will begin a new journey where you will consider important Mobility questions, unpack a system that will help you analyze your efforts and reveal opportunities for improving your processes.

An overview of your path

The key to Mobility success is our proprietary Graebel Mobility PathBuilderSM.

In this guidebook, we will give you a glimpse of the program that can revolutionize Mobility, and serve as a roadmap for success in the global economy.

Of course, Mobility PathBuilder is not a standalone, do-it-yourself, fill-in-the blank solution. It is not a digital textbook filled with buzzwords and academic theory.

It is the culmination of years of experience gained on the ground working with our most innovative partners and clients — Fortune 500 companies across the globe. The concepts are field-tested. Time-proven. Results-driven. Working alongside a Graebel expert is the best way to develop your robust custom solution.

Graebel Mobility PathBuilderSM



To get you started, we have separated the Mobility challenge into sections with tools to help you each step along the way. At the end of the three sections, we include tips and suggestions to help you prepare for productive working sessions.

The “Strategy” section deals with identifying strengths and vulnerabilities and organizing your efforts to take a deeper dive. “Return on Mobility” will help you analyze and quantify your Mobility investment with real-world metrics. And “Stakeholder Engagement” will guide you to find allies to move your new plan forward. Together, these three steps can help revolutionize your Mobility program for lasting impact well into the future.

It is all easier than you ever imagined. Dare we say, fun. But the proof is in the process. So, let’s dig in.

Mobility Matters

Mobility touches operations in every corner of the company. Consider how the following initiatives are impacted by decisions made at the Mobility level.

#1 Talent acquisition

According to a recent Wakefield Research survey conducted for Graebel, up to 84% of millennials are willing to relocate for a job — and 82% believe it's necessary for career advancement. Does your program enhance or detract from these expectations?

#2 Talent retention

A strategic Mobility program can ease the burden of those working abroad — as well as those working behind the scenes. A well-conceived global Mobility plan illuminates paths of advancement for your best and brightest.

#3 Company branding

Your Mobility program is front and center for the world to see and is an extension of your company brand. How clients, prospects and employees — especially new hires — perceive it will have a lasting impact on growth.

#4 Compliance issues

Regulations and requirements around the world are constantly changing. You must be prepared well enough to react, and agile enough to adapt. In short, you must be ready for anything the world throws at you.

#5 Productivity

What works today might impede success later. Identifying the knowledge gaps between Mobility and other company roles can help you anticipate areas of improvement and adjust your strategy to increase productivity.

#6 Improve return

Workforce Mobility should never be considered a “sunk cost.” Investing in talented employees with a sound Mobility program puts new profit opportunities within your grasp.

Step One: Mobility Strategy

Laying a firm foundation for success





1. Assessment

VIEW YOUR JOURNEY FROM 35,000 FEET

Some managers are focused mostly on day-to-day challenges. Others spend their valuable time developing policy to empower assignees on the global stage. Some set the stage and decide what needs to be achieved to leave a meaningful legacy for those who follow. And all of them share a common mission: to make Mobility more valuable to their organization.

The most effective amongst them always start by seeking a holistic view, no matter how chaotic their workday is. Our first goal is to help you gain valuable perspective.

How is Mobility viewed within your organization? How does it align with the corporate mission? Whom do Mobility's actions most affect? And whose active participation is integral to its success?

It's important to delve into colleagues' opinions and attitudes. What are they really thinking and feeling? You will start to see how their perceptions shape your Mobility program, and the resulting position Mobility holds within your organization.

51%
– of –
MOBILITY
PROFESSIONALS

Find it difficult to get
stakeholder attention.

*2018 Global Mobility Summit Survey
EMEA, Americas, APAC (n=75)

2. Key Drivers

RECOGNIZE WHAT WILL STEER YOU ON YOUR PATH

It is tempting to think of Mobility as a never-ending stream of unpredictability. But there's a more positive way to look at it. While internal and external forces will always affect your enterprise, success or failure depends on your reaction to them.

That's where preparation comes in.

It starts with a precise accounting of key drivers. Necessarily, there will be common beliefs, constraints and standard operating rules — things done because that's the way they have always been done. These may pertain to pre-existing relationships, technology, available resources or myriad of other challenges specific to a company or an industry.



Impact at the insideMOBILITY® Global Mobility Summit

Documenting them, and better understanding their reason for being, tends to reveal the strategic levers you can pull in important initiatives. Perhaps it is a corporate expansion. A headquarters relocation. Talent development. Or risk management. These are all opportunities to prove the value of Mobility within the broader scope.

Mobility can prove its value when aligned with the company's business imperatives. And we are here to help you do just that.



3. Mission Statement

HOW WILL YOU INSPIRE OTHERS IF YOU CAN'T PUT YOUR MISSION INTO WORDS?

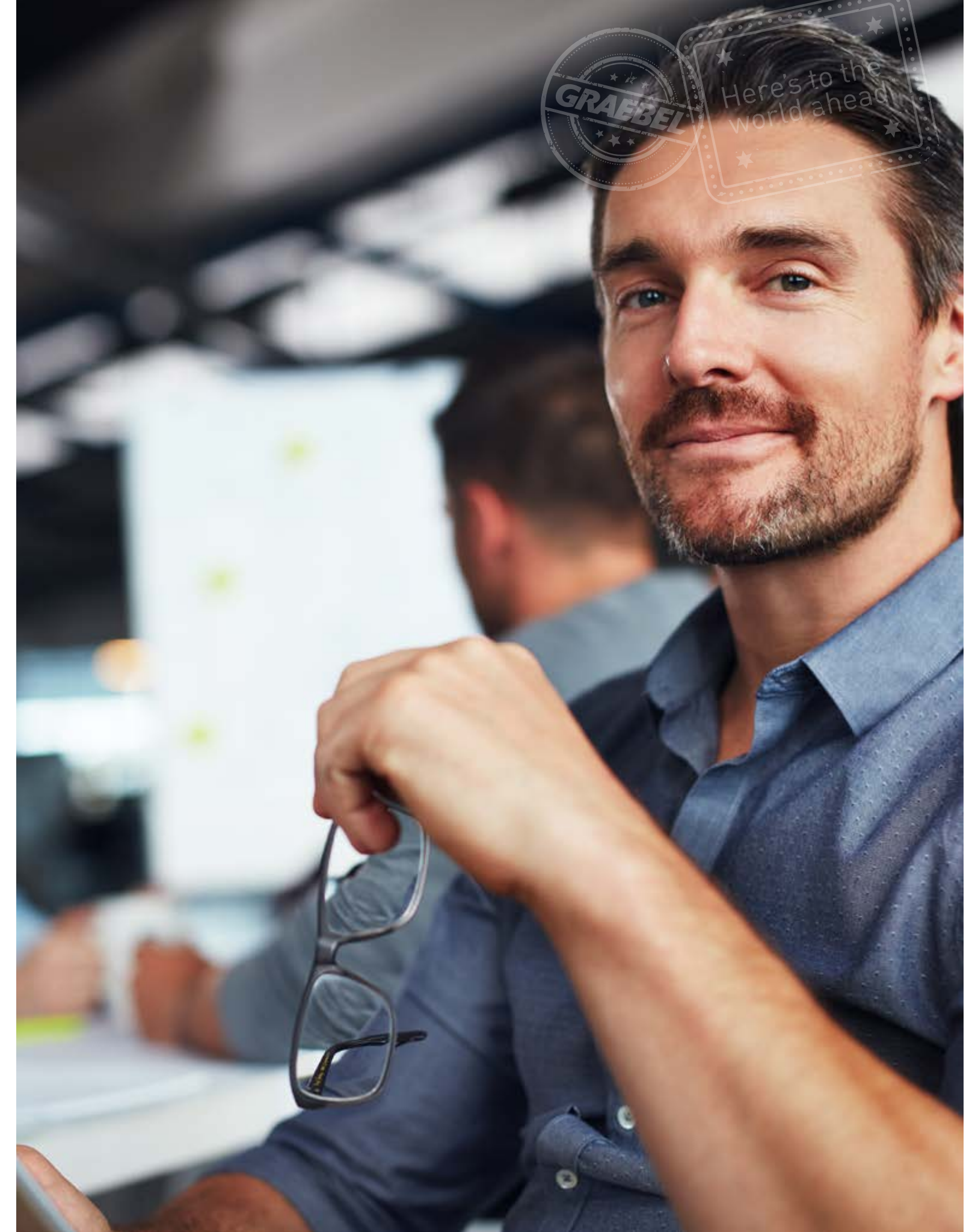
Now it's time to start assembling the pieces into a comprehensive Mobility Mission Statement that captures Mobility's purpose within the context of the overall company strategy — and begin to define initiatives to drive success.

Your mission statement should lead to tactics so you'll understand not only what you want to accomplish, but also how to do it.

42% OF MOBILITY
DEPARTMENTS

Do not have a defined mission statement.

**2018 Global Mobility Summit Survey EMEA, Americas, APAC (n=77)*



Sample Mission Statements

A key objective will be to transition your mission statement from transactional to strategic. The strongest, most actionable strategic mission statements are multifaceted and balance strong policy with flexibility.

TRANSACTIONAL

We ensure that employees get from Point A to Point B at the lowest cost, safely.



STRATEGIC

We take the lead on executing the global Mobility strategy by engaging the business to support the talent agenda.

Other examples of strategically focused Mobility missions developed by Fortune 500 companies:

- #1 To **elevate the experience** of our transferring families while focusing on cost effectiveness, global consistency via **industry leading technology** and **3rd party support**.
- #2 To deliver program and process **excellence** to relocated employees in the **most efficient and least disruptive** way possible.
- #3 To **maintain consistency** within the relocation program while **meeting the needs** of the transferring employee — through **ongoing monitoring** of the program's exception process, and making necessary **policy changes where warranted**.





Here, you can see how others created plans to accomplish their missions using key phrases and themes inspired by the Mobility Strategy tool:

TOP MISSION PRIORITIES

Our mission is to _____

- Align with business units
- Increase cost management initiatives
- Support talent goals
- Elevate the experience of transferring families
- Right talent, right place, right time

We will accomplish it by _____

- Revitalizing policies and procedures
- Continually monitoring the exception process
- Finding more ways to be flexible in our Mobility proposition
- Becoming more aligned with other business units
- Increasing buy-in from key program stakeholders
- Partnering with world-class providers



4. Strategies

WHERE DREAMS CAN START TO RESHAPE REALITY

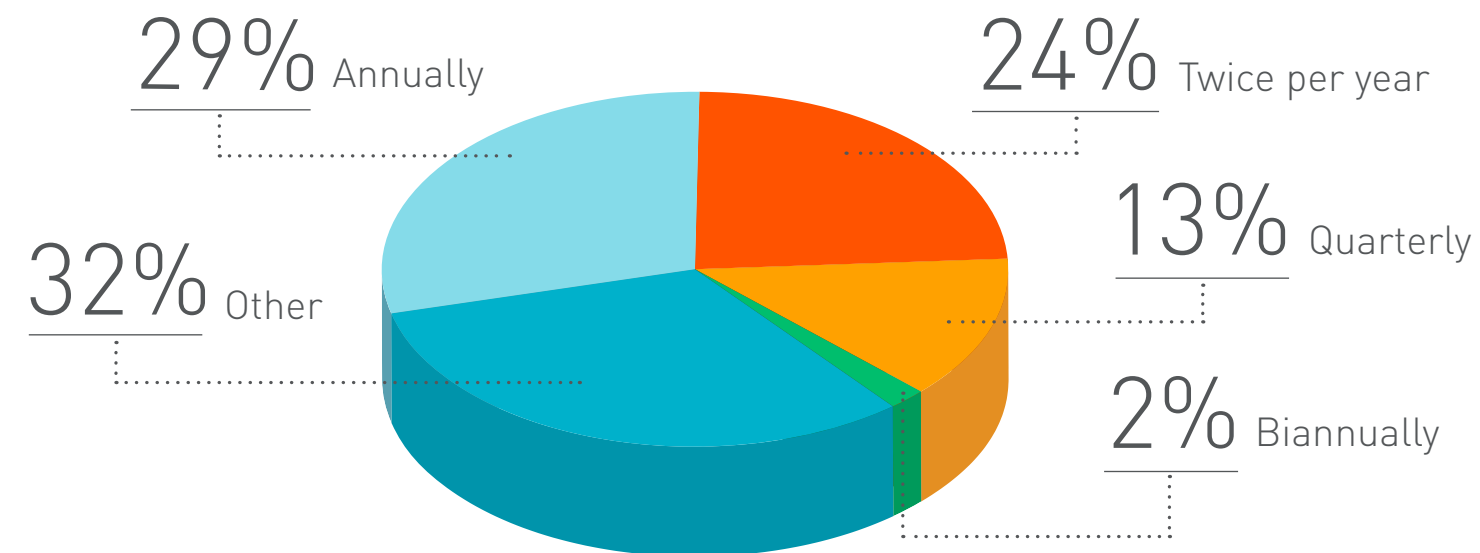
Now you can really become visionary. This is where the process gets fun.

You may find yourself dreaming up new policies, re-energizing a focus on metrics, expanding resources and vendors and creating industry-leading innovation. The opportunities are many and varied.

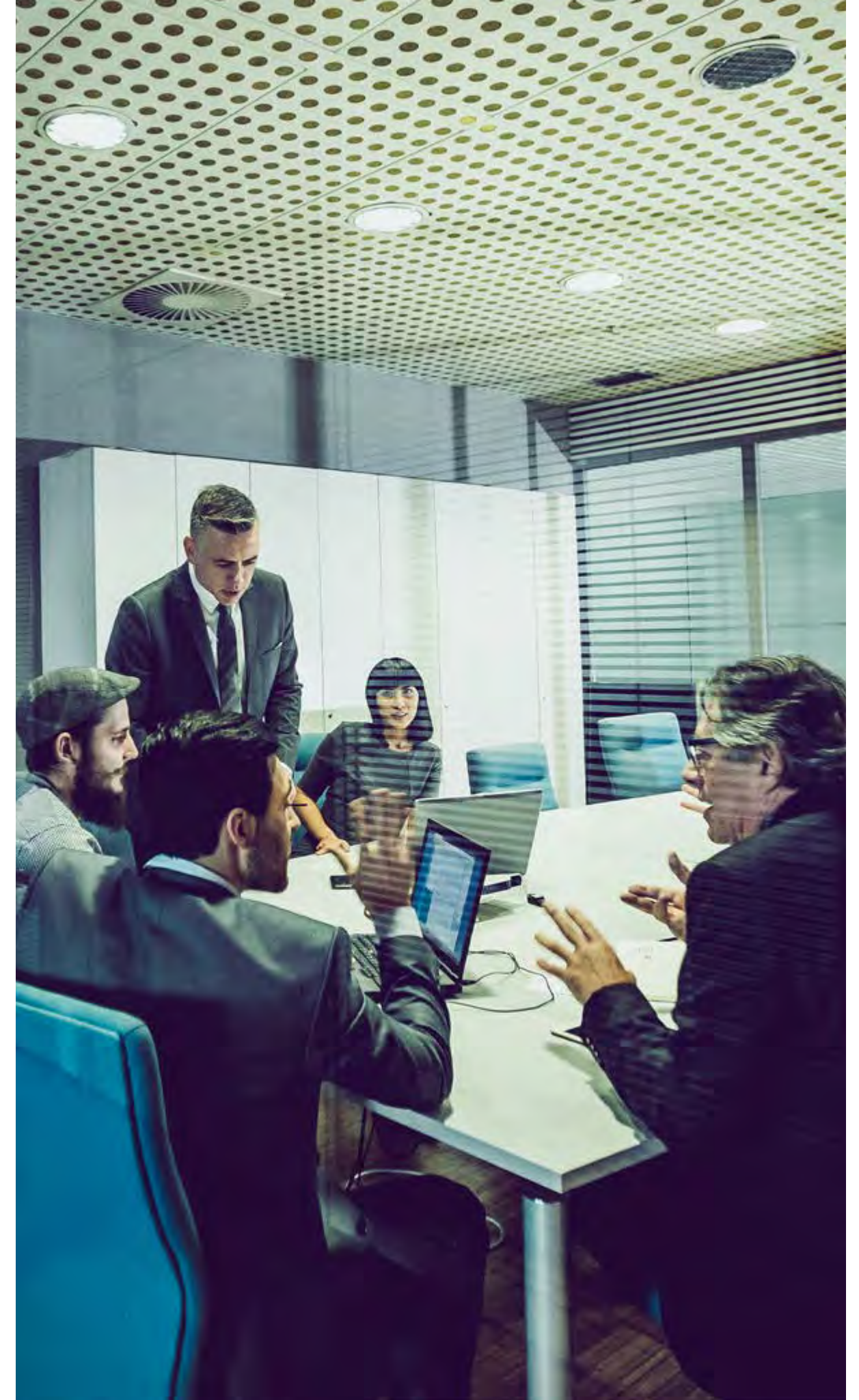
Imagine how your organization can benefit from this proven, systematic method. If it seems daunting, take comfort in knowing we usually complete the first step, Strategy, in just one afternoon.



How often Mobility teams meet to discuss overall program strategy.



**2018 Global Mobility Summit Survey EMEA, Americas, APAC (n=76)*



Preparing for your work session: Mobility Strategy

So you'll be ready to start building a plan right away, consider these thought-starters to build your Mobility Mission Statement and Strategies:

#1 YOU HAVE A BRAND WORTH ELEVATING:

What three words describe your Mobility function within the company today? How would you like it described in the future?

#3 KNOW WHERE YOU'RE HEADED:

What is the most important goal to accomplish with your Mobility Mission Statement? Knowing this will help you prepare your work session, including additional insights and data that might be needed to make that discussion productive.

#2 COLLABORATION BUILDS A MOVEMENT:

Who within your company would benefit from participating in a working session to develop a purpose-driven Mobility Mission Statement and supporting strategies? If you operate within a team, consider inviting them to your work session to contribute and help build consensus.

#4 KEEP AN EYE ON YOUR MISSION:

Monitor strategies used to deliver your Mobility Mission Statement, paying particular attention to key company initiatives that gain traction. Have that in mind as you proceed.

Strategic Opportunities for Mobility:

Recent workshops* with Mobility experts indicate some key areas you might want to consider for the future of your Mobility program:

TALENT DRIVER:

49%
OF MOBILITY
PROGRAMS

Don't play a role in formal Workforce Planning initiatives that fill gaps in the company's workforce. Mobility can help build the next generation of leadership.

*2018 Global Mobility Summit Survey EMEA, Americas, APAC (n=85)

GROWTH ACCELERATOR:

64%
OF MOBILITY
PROFESSIONALS

Report that their company doesn't have a method for identifying the right talent for assignments and relocations. That can limit company growth.

*2018 Global Mobility Summit Survey Americas, (n=45)

MILLENNIAL ADVOCATE:

90%
OF MOBILITY
PROFESSIONALS

Don't currently have a program that relocates professional gig workers. A clear opportunity to connect with workforce trends.

*2018 Global Mobility Summit Survey EMEA, APAC (n=41)



Step Two: Return on Mobility

Quantifying the investment in your most valuable resource





| Data can illuminate your path

If ever there were a formidable challenge in global business, it is in applying measurement to Mobility efforts — beyond benchmarking — to compile and translate data from your investments in human capital. And use it to create a stronger company.

The secret lies in creating a powerful story that doesn't merely cite the facts but presents them coherently and cohesively. Using a process that engages key stakeholders and mobilizes them towards your goals. You will build your story starting at the Ideal Outcome and trace a path back to the data. The idea is to link your mission statement to an overall corporate strategy, which will help define an Action Plan that guides your journey.

This is where Graebel's Return on Mobility (ROM) tool comes in.

You will find the larger connections that live in the minutia of your data. Clients report that using the ROM tool with a Graebel expert is a good way to ease the process.

ROI



Revenue

vs.

ROM



Revenue

+



People

+



Assets



UP
TO **65%**
— of —
**ORGANIZATIONAL
STRATEGISTS**

Believe a Global Mobility
strategy makes an impact
on the organization's
financial performance.

— Harvard Business Review, "Strategic
Global Mobility: Unlocking the Value of
Cross-Border Assignments"

1. The ROM Question

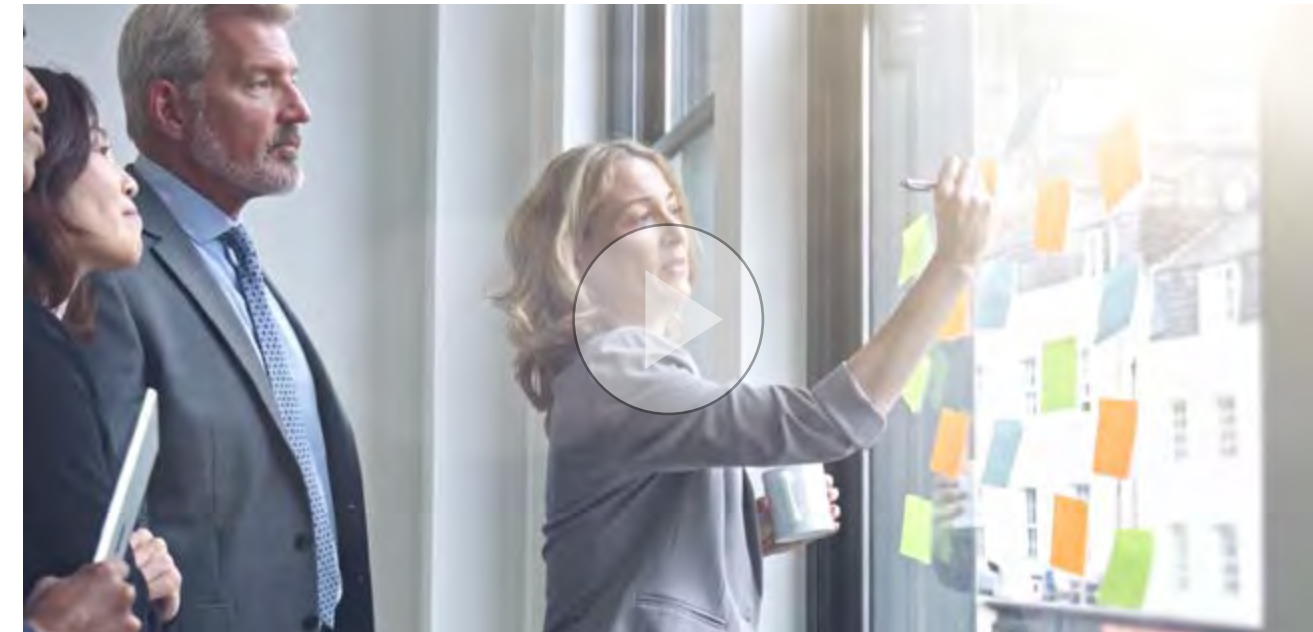
THE RIGHT QUESTION WILL BE YOUR COMPASS

The first step is to isolate specific questions stakeholders may have about Mobility's role and function in overall corporate initiatives.

- Are we developing the right employees?
- Do our current policies cost us or save us money?
- Does our U.S. home sale program contribute to employee productivity?
- Do relocating employees outperform their peers?

Aim for an ROM question of significant scope and strategic value to the company.

Narrow down your list of ROM questions and build on one at a time.
You can repeat the process for additional ROM questions.



Bring the story of Mobility to life with data.



2. The Outcome Statement

YOUR IDEAL RESULTS

With your Mobility Mission and corporate strategy in mind, you'll craft your goals and data into clear relatable answers that build the story — an Outcome Statement that answers your stakeholders' ROM Question.

Other companies have employed these Outcome Statements:

- Enhance the reputation of the Mobility program to attract and retain the best employees
- Develop talent that will meet the future vision of the company
- Create value or saving costs across departments

Sample ROM Question: Does global rotation work?

Senior leaders of a Fortune 500 company questioned their rotation program's influence on talent acquisition and leadership development. The most readily available data related hard costs with exception volume, core-flex policy and short-term assignment benefits.

IDEAL OUTCOME

Global rotation develops future leaders but at a greater cost than standard short-term assignments.



3. Supporting Data

MEASURING RETURN ON INVESTMENT BEYOND BENCHMARKING

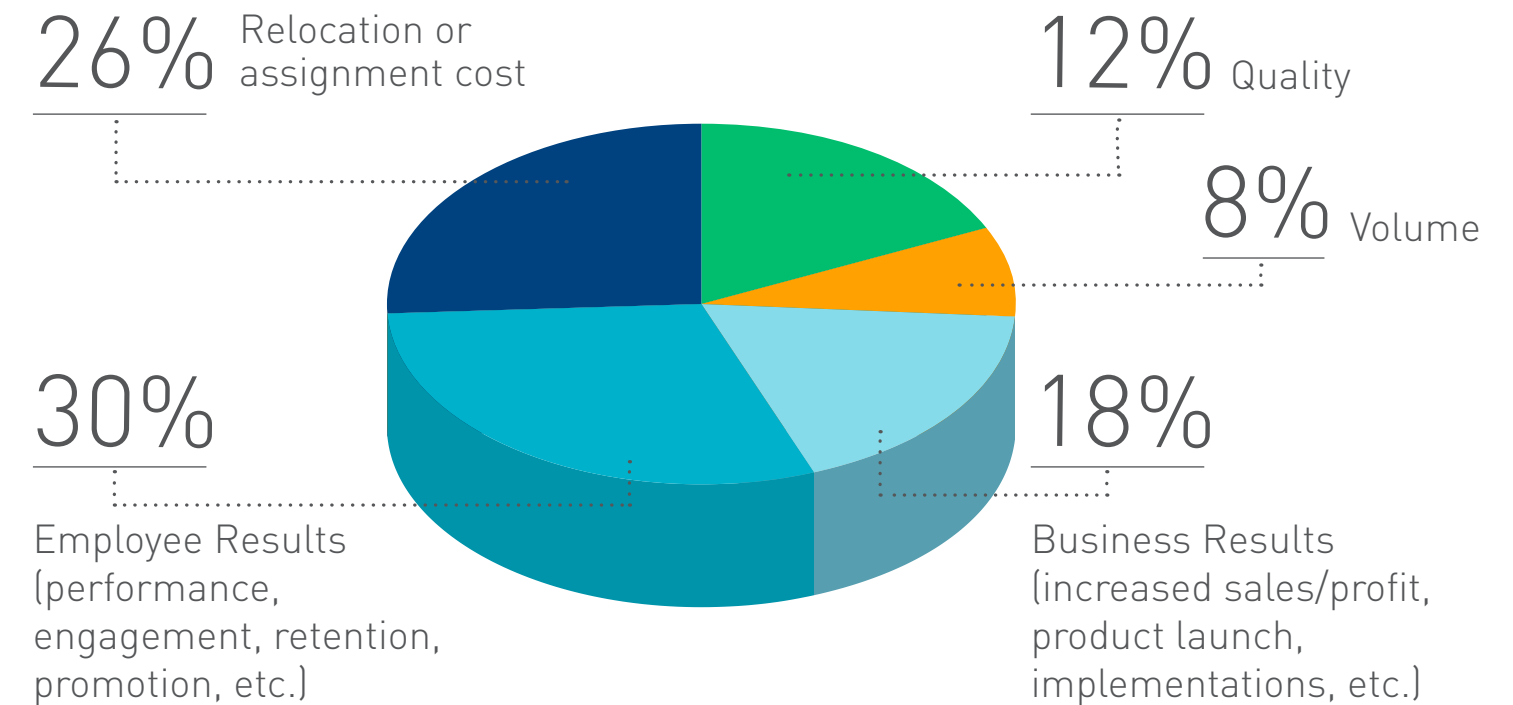
The entire ROM process includes individual analytics such as talent performance scores, levels of completion and promotions. It immerses you in the details of relocation, exception data, self-service versus full-service, defect numbers and overpayments. It includes the analysis of external relationship quality as defined by Service Level Agreement supplier scores. And evaluates internal relationships through feedback channels, trends of retention and attrition. And finally, it dissects costs by initiative, policy, business unit or region.

To recap, your ROM Question, Outcome Statement and supporting data will guide your Action Plan where you will articulate your approach, timeline, deliverables and resources needed to tell a compelling story.





Mobility professionals use the following types of data to establish Return on Mobility



*2018 Global Mobility Summit Survey EMEA, Americas, APAC (n=76)



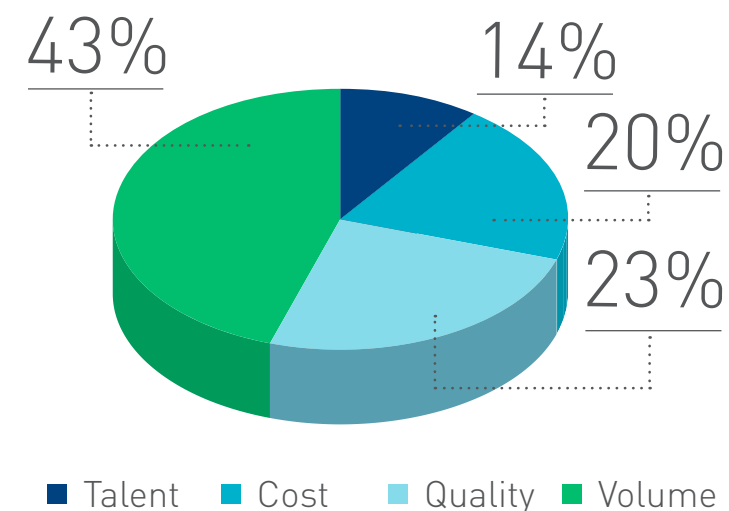
Preparing for your work session: Return on Mobility

Here are some considerations as you prepare your Ideal Outcome Statement.

#1 DEFINE WHAT METRICS YOU CONTROL:

What do you have in place today that really matters?

How is your Mobility program measured, by you and your stakeholders?



**Graebel Mobility PathBuilder Strategy tool (n=70)*

#2 KNOW WHAT'S ON THE HORIZON:

What are the main corporate strategic initiatives that you can impact?

#3 CONSIDER COLLABORATORS:

Who within the company can provide metrics that link to your Mission and can help define what you'll measure in the future?

Mobility professionals hope that offering stakeholders a deeper understanding of Mobility's value will:

- Provide a more detailed view of the assignee experience
- Highlight the policies/systems that need revision
- Help them set success benchmarks
- Demonstrate the impact Mobility makes
- Align Mobility with other business units
- Make them a strategic partner
- Build Mobility's brand — "Becoming a trusted partner"



Step Three: Stakeholder Engagement

Leveraging the human part of your resources



1. Identify Stakeholders

YOU HAVE ALLIES THAT WILL JOIN THE JOURNEY

The final leg of the journey focuses on engaging stakeholders and gaining their support. This will help you manage their expectations, influence outcomes and launch your new Mobility Mission. You will inspire your audience to embrace the mission with you, ultimately becoming ambassadors for your cause — and you advancing theirs.

You'll find ways to connect those involved in corporate strategic initiatives that are crucial to your Mobility Mission, such as leadership development and talent management. They will be your allies and your reconnaissance team. It's imperative you engage them in meaningful dialogue from the start. After all, what's important to them is critical to your success.





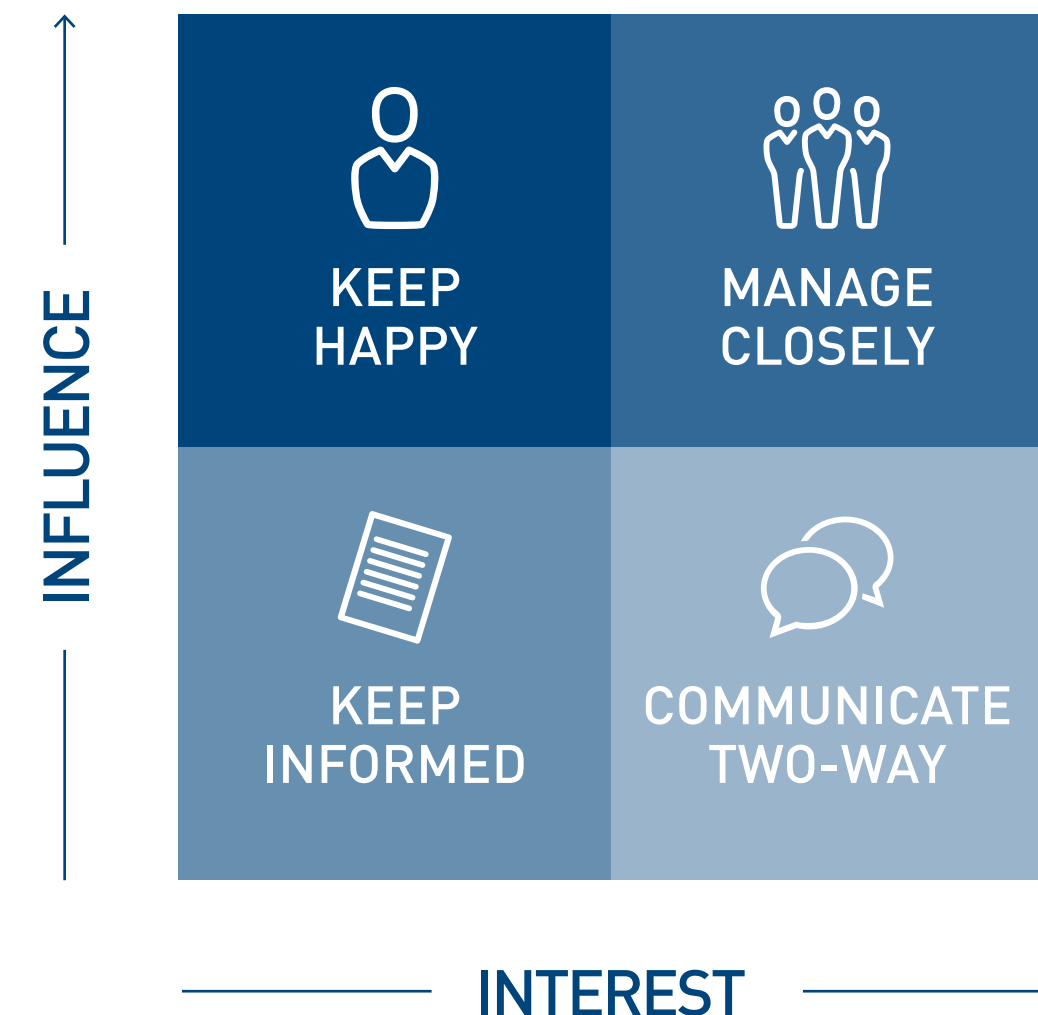
2. Segmentation

ALL INFLUENCERS ARE NOT CREATED EQUAL

Once you've identified a group of stakeholders that connect Mobility and Corporate Strategy, it's time to segment and categorize them, identify their important issues and decide the role they will play in advancing the mission.

You will find varying levels of corporate influence, engagement and enthusiasm. Some people may be highly regarded but hardly invested in Mobility, while others may rank lower within the organization but be critical gatekeepers for your efforts. While all stakeholders are important, you'll want to pay special attention to those who rank highly in both influence and interest in Mobility. Organizing them on a matrix will help you efficiently attend to their needs, while ensuring a reasonable level of interaction.

Promoting a relevant attribute (or set of attributes) from your Mobility Mission Statement to this audience will fall short if you stop there. You'll need to connect these attributes to stakeholders in meaningful ways.



*Source: Fisher, R., Patton, B., & Ury, W. (2011). *Getting to yes: Negotiating agreement without giving in* (Rev. ed.). New York: Penguin Books.

3. Mutual Benefits

THE BEST SUCCESS IS NOT A ZERO-SUM GAME

In your endeavor to seek common ground based on mutual interests, asking good questions of stakeholders is key.

Starting with, “What’s in it for me?”

The goal is to articulate options for mutual gain using objective criteria. And use them to form a powerful connection not only to stakeholders but between each other.



The Case for Future Leadership

Mobility created a Talent Development Initiative for strategic growth using a series of short-term, rotational assignments.

→ Key Stakeholders:

Senior Business Leaders

→ Communications Goal:

Gain executive sponsorship and vocal support from leadership

→ Mutual Win-Win:

Ensure the future success of the firm by creating unique opportunities for the “best and brightest”

What were the tactics used to engage stakeholders?

- Written quarterly updates
- A project intranet site
- Participation in the Talent Development Steering Committee

4. Win-Win Scenarios

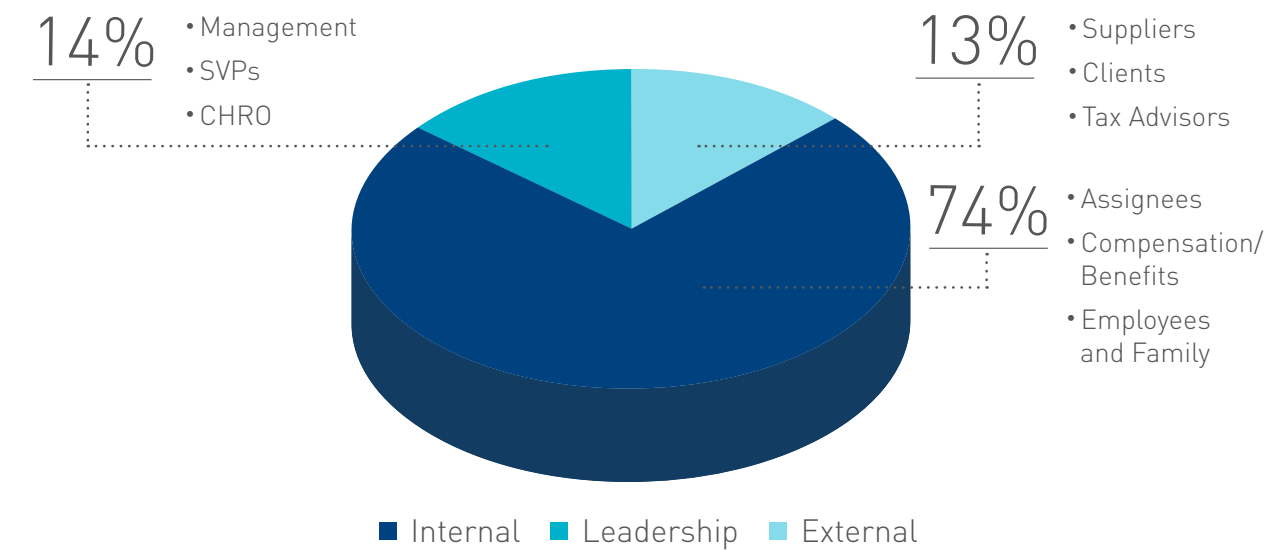
INSPIRATION IS CONTAGIOUS

Documenting stakeholder benefits and their critical connection to corporate interests is important — but merely groundwork. Summarizing the benefits that your stakeholder can attribute to the specific mission only gets you so far. Inspiration comes alive when your stakeholders come together symbiotically.

What would be a win-win for your stakeholders? Perhaps it's a heightened confidence in Mobility — freeing them to better focus on their initiatives. Or it's additional support from leadership as a result of Mobility's positive impact. Perhaps it's a renewed investment in Mobility that enhances goals of other departments.

Set the bar as high as you did when you determined your goals during the Return on Mobility step of the process.

Most Important Stakeholders



**Graebel Mobility PathBuilder Strategy tool (n=88)*



Stakeholders are only human; not always rational, reasonable, consistent or predictable. Here are a few things to ensure even more success with stakeholder engagement:

- Communicate early and often
- Ask the right questions to gain useful information and ideas
- Have a plan
- Do things that improve relationships
- Mutually agree on what success looks like (collaboration)
- Find compromise





Stakeholder engagement is a primary driver of Mobility's success.

5. Communication

SET A PATH FOR ALL TO FOLLOW

It's important to be clear about what exactly we want our people to do. What specifically will advance both Mobility's and their own interests? How will you communicate with them and keep them informed? And, as their leader, how will you channel their enthusiasm and feed their interest?



Preparing for your work session: Stakeholder Engagement

Here are some things to consider as you work with your stakeholders:

#1 YOUR MOBILITY BRAND WILL HAVE IMPACT:

Once your Mobility Mission is underway, what will that mean to the company? How will things be different? Have that in mind as you build your Stakeholder Engagement plan.

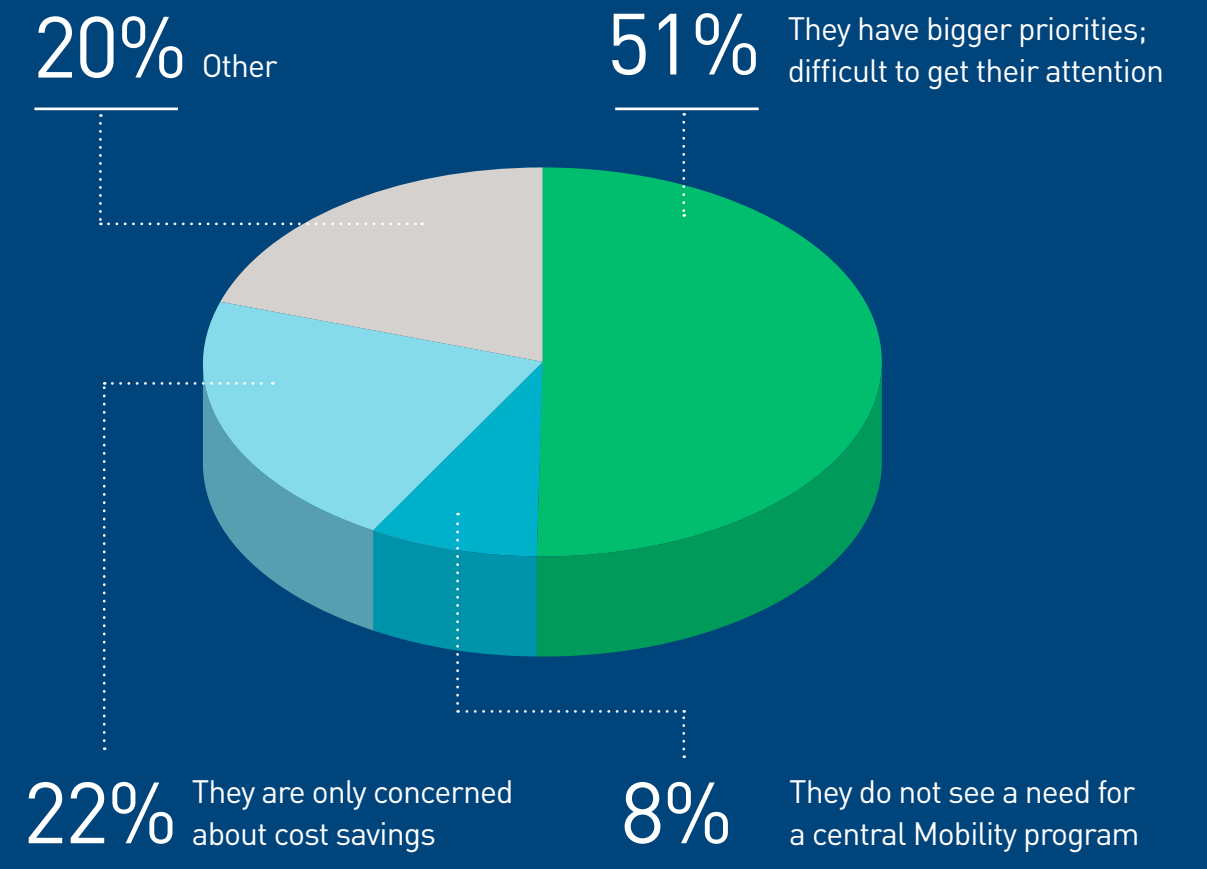
#2 COLLABORATORS CAN MAKE ALL THE DIFFERENCE:

Based on your Mobility Mission Ideal Outcome statement, who within the company will be affected the most? They might not be the same people that are most interested in your actions in the beginning.

#3 DIFFERENT TOOLS FOR DIFFERENT INTERESTS:

What communication tools might you use to engage stakeholders? Email? Mobility dashboard? The corporate newsletter? Rank them by importance and ability to reach your stakeholders.

What are the top reasons Stakeholders don't engage with Mobility?



*2018 Global Mobility Summit Survey EMEA, Americas, APAC (n=75)



Forging Your Path:

Putting it all together





You can get there from here

Truth be told, where Mobility managers today spend their time is simply not where they want to spend it. Time spent on reactivity robs from finite time that could be spent on proactive measures.

The industry is narrowly focused in a tactical, transactional bubble. In conversations with our partners and data from our insideMOBILITY® Summits, we've seen a pressing demand for a disciplined solution to Mobility challenges.





Where do Mobility Professionals want to invest their time?

Eighty-two percent of Mobility professionals report they currently spend most of their time on transactional activities and service issues. Ninety-six percent said they'd rather spend their time solving strategic-level activities.* The PathBuilder program is a proactive, disruptive approach that elevates the future strategic role of Mobility and frees up your time to create exceptional value.

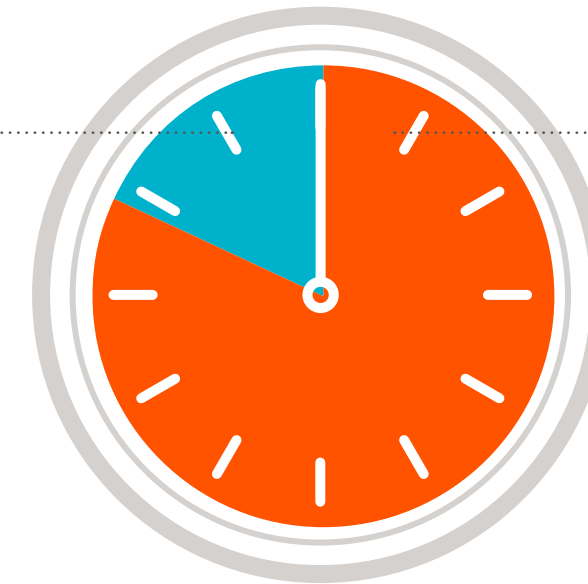


Mobility's reality today:

18%

Proactive

Setting goals, measuring return and enhancing relationships



82%

Reactive

Transactional and service issues

Future vision for Mobility:

96%

Proactive

Setting goals, measuring return and enhancing relationships



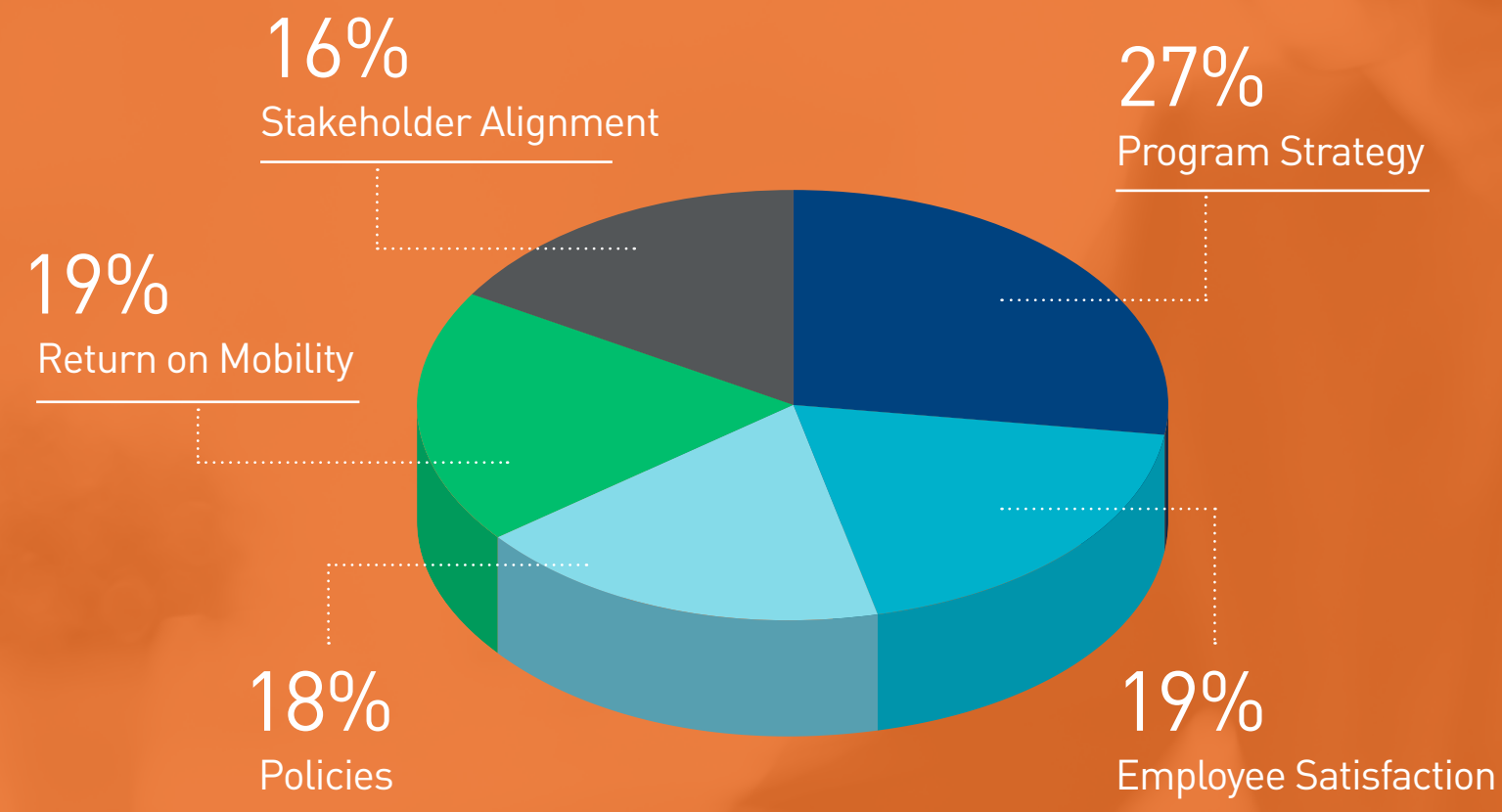
4%

Reactive

Transactional and service issues

*2018 Global Mobility Summit Survey, APAC (n=45)

Mobility professionals cited the following areas they would like to improve or enhance in the next year:



*2018 Global Mobility Summit Survey EMEA, Americas, APAC (n=133)

An overwhelming majority of Mobility professionals have already identified the specific areas that the PathBuilder tools can improve the future vision for Mobility.





Your Mobility PathBuilder journey will be defined by the stops along the way; in this case, steps that build on each other. Three steps that work together to achieve new definitions of success. We have the tools, momentum and resources to help you make a difference.

As you proceed, you get closer and closer to earning Mobility's role in your company's future.

It's pretty simple when you break it down:

Graebel Mobility PathBuilderSM



**MOBILITY
STRATEGY**

#1 Start broad, then refine your Mobility Mission to understand your purpose and its primary drivers.



**RETURN ON
MOBILITY**

#2 Track data wherever it lives, establish metrics, measure and analyze.



**STAKEHOLDER
ENGAGEMENT**

#3 Get stakeholders involved and excited to become ambassadors.



**BUSINESS
IMPACT**

Drive change using Mobility as a new lever for business growth, and earn your seat at the strategic table.

We don't expect you to start the journey alone

A strength of the Graebel team is our tactical and strategic Mobility expertise — and this exciting opportunity to elevate your program is no exception. We have the ability, the knowledge and, moreover, the people to make our time together an efficient and productive experience.

Ready to take Mobility to the next level? Know that we are too.

CAN YOU FIND A FEW HOURS TO CHANGE YOUR WORLD?

Did we mention all it takes is an afternoon together to start reaping the benefits of the aforementioned steps for Mobility Strategy? That's it. Just a few hours to leave with a more focused, concise, efficient plan to start thinking about Mobility in a way you may have never dreamed. And share the vision with the rest of your enterprise.

Contact us and we'll get a session scheduled at your earliest convenience. Let's take the first step together.

view.graebel.com/mobilitypathbuilder

