



GRAEBEL[®]

PEOPLE-FIRST
MOBILITY

Group Move Services: Six Stages to Success

Planning and executing a successful group move involves more than getting employees from Point A to Point B. It takes setting clear goals and expectations, defining roles and responsibilities, and coordinating the efforts of internal partners, external partners and stakeholders.

Graebel's group move services apply a multidisciplinary approach that recognizes the full lifecycle of a group move, from planning through support and analysis. Emphasizing strong relationships with the client's HR and Workforce Mobility Teams, Graebel provides guidance, services and operational support to group moves of all sizes. Services include: client services, online support, and a wide scope of partner vendors that align to the client's tactical and strategic group move goals.

We partner with clients in all or some stage of the group move process, while being careful to let the client dictate Graebel's level of involvement – whether it's in pre-announcement planning and communications design or managing relocation cases once employees have made their decisions.

Considerations – Key Questions for HR and Mobility



Goals and Success Measures

- How will the Workforce Mobility Team define success for the group move in the short- and long-term? Does this differ from how the HR team defines and measures success for the initiative?
- What's the “conversion” rate goal for employees moving to the new location?
- What broader corporate goals should be considered when formulating the relocation plan?



Benefits and Policy

- Do you have clear, documented relocation policies in place? Will you create unique policies for this group move?
- For those employees who are impacted or will be relocating, how can you employ DEI best practices to ensure opportunities for an equitable and inclusive experience?
- Do benefits vary by division or business unit? Will they remain different with this move?
- Will you tier your relocation benefits? If so, how?
- Will you offer incentives to employees to consider relocating? If so, who will fund those incentives? What will they consist of and who is eligible?

- Will impacted senior leaders receive additional benefits, services or incentives?
- Will employees have a choice to relocate? If they choose not to relocate, what happens and when?



Roles and Responsibilities

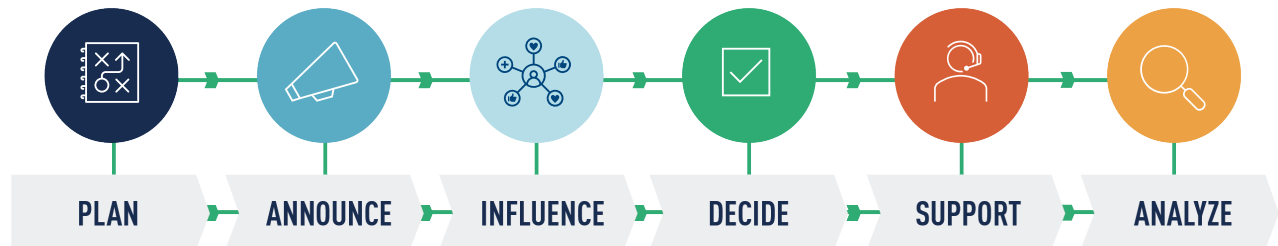
- Have you documented roles and responsibilities both internally and externally? Between HR functions (corporate versus business)? Between you and your relocation provider(s)?
- For those services you'll manage, do you have the resources in place to do this efficiently?
- How aware are your internal partners (tax, real estate, human resources, communications, staffing, managers) of this move? Who will lead the effort of communicating and collaboration with them during the transition?



Logistics

- What are the departure and destination points? How many employees will be impacted? When do you need employees working in the new location?
- How much time will employees be given to decide to move? Will you provide site visits?
- Is the move from a high-cost to a low-cost location or from a low-cost to a high-cost location? Do policies and benefits need to be adjusted to reflect this swing in expense?

Group Move Lifecycle



Defining roles and responsibilities as one of the first steps of group move planning sets a business up for success. Graebel can participate in some or all six steps of the process. The following breakdown of steps – and degrees of ownership – is a proven approach to managing a successful group move:

1

Assess and Plan – When planning your group move, considerations should be given to:

- The business rationale for the relocation (location, selection of impacted divisions/employees and timing)
- Financial modeling (relocation, infrastructure, tax, productivity, separation, hiring, training, public relations, dual operations, etc.)
- Agreement on benefits scope and policies (relocation, separation, incentives, exceptions, tiering by level/location/responsibilities)
- Clarifying the definition of a successful move (percentage of acceptances, speed of implementation, how quickly employees are job-focused, coming in “on budget,” etc.) and the metrics that will be used to track these factors

2

Develop Communication Plans – Once plans for the group move have been established, consider:

- What the communications approach will be (internal and external, including timelines and accountabilities)
- The strategy for employee messaging (tone, methods and timing)
- Incorporating Graebel-led communications (overview of program scope, relocation benefits, roles, timing and expectations)

3

Engage Stakeholders – Secure buy-in and alignment by:

- Planning and executing group or individual site visits (to demonstrate benefits of accepting the move)
- Coordinating with providers (real estate, rental tours, school, spousal/partner support and settling in services)
- Providing clear communication, expectations and timing to employees (regarding visits, the decision-making timeline and Q&A options)

4

Facilitate and Track Employee Decisions – Guide the decision-making process by:

- Developing and confirming the mechanics for employee decision-making; a method for providing a yes or no decision (online or manual), timing, and exceptions (leaves or new hires)
- Collecting and analyzing decisions, and funneling data internally to Graebel and partners
- Initiating relocation cases and partner service orders

5 Provide Support – Implement exceptional relocation experiences by overseeing the:

- Day-to-day case management for relocating employees, including the coordination of supporting partners and policy consultation
- Distribution and tracking of allowances, tax reporting and exceptions
- Management of departing employees (timing, benefits and a staffing plan to fill open roles in the new location)

6 Measure Success and Learnings – Analyze performance by:

- Examining metrics determined in the planning phase and reporting to internal stakeholders
- Tracking and sharing short- and long-term HR measures as necessary (budget to actuals, performance metrics, and retention and satisfaction rates)
- Considering post-move reviews and metrics to help calibrate future group moves

Graebel provides strategic consultation and program/project expertise when helping clients maintain and grow their mobility programs. For more information or questions, please contact your Graebel Representative today or visit our [Contact Us](#) page.