



Merging Mobility Programs: Guidance and best practices

Company mergers or acquisitions can add complications when it comes to mobility programs. The combining of mobility programs and policies while aligning corporate goals and strategies may leave Workforce Mobility Teams concerned about productivity and morale. Planning for changes can help diffuse anxiety and clarify confusion.

Pace-Setting at the Top

As mobility programs are often an extension of a company's talent or workforce planning functions, the impact to those programs depends heavily on the strategic direction set at the top. From culture and location to hiring and development strategies – senior leadership of the merged company must first set the pace of change for mobility to follow.

Once those broad corporate objectives are established, mobility teams must be ready to spring into action.

Consider the following:

- Is there a timeline for this change? How will the current teams support the suggested timeline?
 - What will be the impacts to current mobility structures or current suppliers?
 - Will the program be more centralized, decentralized or a combination of both?
 - What can both organizations learn from each other?
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- Is this a blending of corporate cultures or a more straightforward acquisition?
 - How will mobility strategy be defined? Is it a collaborative effort? Who defines it?
 - Will the current mobility scope expand or contract with these changes? Will there be new countries or new domestic locations?

Suppliers and Systems

With any merger or acquisition, decisions regarding systems and suppliers are complex and have far-reaching impacts. Thinking through questions like those listed below can help focus your program on the size and scope of the changes to come. Ask yourselves the following questions:

- What RMCs are involved and where are we in the duration of our contracts?
- Is an RFP required as part of this change?
- What compliance concerns do we have?
- What tax and immigration third parties are involved? Can they support our program?
- Are there any mobility supplier relationships to discuss, such as household goods or temporary living? Any preferred vendors who may or may not continue to participate in the program?
- Are there any internal system upgrades or implementations that are scheduled at any point during this change, such as to payroll or human resources systems? If so, what are the impacts to mobility?
- Are there “wish list” items your program has been hoping to make? If so, can you make them now during broader changes?

“Mid-Course” Customers

No stakeholders are more important during a transition than the employees on assignment or in the process of relocating. The relationships the employees and their family members may have formed with their RMC’s consultant are often the most important aspects of a move’s success. Examine whether making changes mid-move will hurt the overall employee experience or create service and operational issues when attention should be focused on more significant items. Communication at the right time is paramount. Consider implementing these actions for a successful transition:



People

Determine where all current or pre-departure employees are in their assignment or relocation lifecycle - including timing of travel, leases, home sale and purchase milestones, allowance distribution and important tax-related events.



Relationships

A simple stakeholder analysis - a list of all internal and external relationships impacted by changes, as well as ranking them as primary, secondary, and tertiary relationship - will help define a communications approach about the new program’s design.



Data

Review your scheduled and ad hoc reporting to ensure you have data at your fingertips to answer questions related to spending, expense, exceptions, moves by policy and location, and active and historical counts of assignees and transferees.



Projects and Initiatives

Define the status of all projects and initiatives the Workforce Mobility Team leads or participates in and consider the impact if resources will be unavailable. This inventory can help provide a more complete scope of the team’s level of effort and contribution within and outside of mobility.



Systems

Take a high-level inventory of all systems that Workforce Mobility Teams interact with, such as payroll, human resources, supplier systems (relocation management company, tax, immigration), travel, succession planning or talent databases. A reference guide with key terms and basic definitions can clarify confusion.

Getting Started

Mobility teams can start the planning phase even before a broader corporate vision is defined. The earlier they have a full sense of a few basic factors, the easier the changes will be to manage. Here are three actions to take when merger or acquisition news is announced:

1 Take an Immediate Inventory

Knowing details, both big and small, about your program is essential to future success.

2 Identify Decision Makers

Understanding who will be making final decisions and what their current level of awareness about mobility is can help you determine the level of information and data you share. It will also save your team valuable time when action steps need to be taken.

3 Plan before Communicating

A comprehensive communications strategy is vital to the changes your program may undergo; knowing the “who, what and when” are essential. Not everyone needs the same level of detail and, in many cases, less is more when it comes to clarity of messaging. You may only get one opportunity to frame a new program approach, so take the time to structure the content, phrasing, methods, and timing before communicating any details to internal or external stakeholders.

Sample Stakeholder Analysis

Stakeholder Name	Organization	Function	Role	Impact of Change (L, M, H)	Influence on Change (L, M, H)	Key Concerns	Notes
Lisa Jones	Company ABC	Payroll Ops	Director	H	M	Resource availability	Previous implementations may have left negative perception
Janice Smith	New Company	Payroll Ops	Senior Manager	H	M	Very vocal about RMC preferences	Single point of knowledge in group; vital to transition to new program One-on-one discussion critical
Wade Peters	New Company	HR Ops	SVP	H	H	New EVP of HR Ops for combined company	In support of strategic role for Mobility program; key advocate
Lance Faulk	New Company	Line HR	VP of HR - Manufacturing U.S.	H	H	Has ear of business unit leader of most impacted teams (2k moves in '21)	Passionate advocate for "excellent employee experience"
HR Leadership Team	Company ABC	HR Leaders	All SVP or above	M	H	Pressure to implement new HR structure in Q2	All corporate headquarters based with long tenures in HR
Marissa Lopez	New Company	Corporate Travel	Director of Travel Services	H	M	High level of data integration with RMC today	Process-oriented - 6 Sigma Black belt
Kent Jones	New Company	Procurement	Manager	L	H	Understands mobility services in detail	Participated in last RFP
Ranjiv Krishana	Company ABC	Procurement	Manager	L	H	No previous exposure to mobility	Important to shorten learning curve now
Micah Haynes	Company ABC	Business Unit HR	VP of HR – EMEA Manufacturing	H	H	Concerned about new country combinations	Former long-term expat; advocate for new developmental programs
Teresa Colgan	New Company	Mobility Team	VP of Global Mobility	H	H	Tasked to lead merger of two programs	N/A
Hannah Bogut	Company ABC	International Compensation	Director of Mobility Services	L	H	Leads 3-person cost projection team; wary of change	Concern expressed about New Company's reliance on RMC to do all cost projections

Sample Communication Plan

Deliverable	Audience	Type	Method	Purpose	Timing / Frequency	Owner
Announcement #1	EMEA line HR APAC line HR U.S. line HR	Informational	Email	Introduce "One Globe" mobility team initiative; provide high-level goals, timeline and owners	6/1/2022	One Globe project team
Project Kick-off	One Globe team – SME team HR leadership	Mandatory	Email and team meetings	Formally start One Globe effort; build enthusiasm and gain public commitment to SME resource availability	6/15/2022	One Globe project team
New Mobility Team Structure	HR (line and corporate) General services Procurement	Mandatory	HR Forum Email follow-up	Announce new mobility team structure, including roles, structure, goals, and timeline for changes	Forum – Quarter 3 Email – immediately following	Merger team - HR leads One Globe team
RMC Decision	Active "movers" – All HR General services Procurement Senior Leaders	Informational	Email	Announce consolidation of RMCs into one provider timeline and implementation milestones	Quarter 4	One Globe team Procurement
RMC Tool Training	Staffing Mobility team corporate comp	Training	In-person training (classroom)	3-day training session (all four modules)	Quarter 4	RMC training team One Globe team
Rotation Program Launch	Enterprise-wide	Mandatory	Email Internal site	Announce new development global rotation program; launch new website and application process / FAQ	Quarter 4	Talent development One Globe team