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The Next Wave of Transformation

New technologies emerge
across the mobility value chain

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New Ways for International One-Way Transfers

THIS POLICY APPROACH CAN SAVE COSTS
AND GIVE EMPLOYEES FLEXIBILITY

Strategies for the Remote-ification of Work

ATTRACT NEW TALENT AND SPUR
COMPANY GROWTH

Care in Crisis

COMPANIES ARE REDEFINING TODAY'S
DUTY OF CARE FOR OVERSEAS WORKERS

A person is shown from the waist down, wearing a white shirt and brown work boots, painting a large, colorful abstract artwork on a canvas. The artwork features vibrant colors like teal, orange, yellow, and red. The person's hands are visible, with one hand resting on the canvas and the other holding a paintbrush. The background is slightly blurred, showing a workshop or studio environment.

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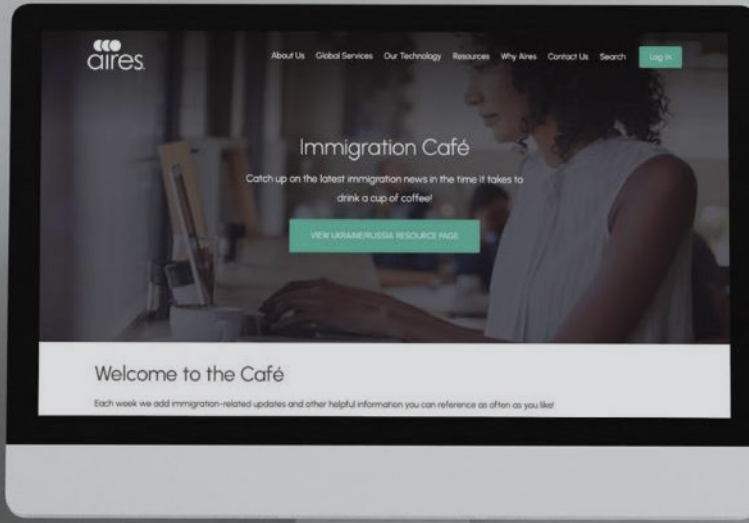
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Scan the QR code to catch up on the latest immigration news. Each week we add immigration-related updates and other helpful information you can reference as often as you like!





The Next Wave of Transformation

BY TINA NAZERIAN

Self-service and automation are in high demand as new technologies emerge across the mobility value chain.

ISSUE 4 2022

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New Ways for International One-Way Transfers

BY GRACE KERNOHAN

One-way moves used to be just for permanent transfers, but global mobility is finding creative ways to apply this policy approach to save costs, support remote work, and give employees the flexibility they want.



Strategies for the Remote-ification of Work

BY CHRISTY UMSTADTER

A corporate mobility strategy that capitalizes on global remote work can create opportunities to attract new talent and spur company growth.



Care in Crisis

BY ROBERT BITTNER

First COVID-19, then war—companies are redefining today’s duty of care for overseas workers.



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About Worldwide ERC®

Worldwide ERC® is the workforce mobility association for professionals who oversee, manage, or support U.S. domestic and international employee transfers. The organization was founded in 1964 to help members overcome the challenges of workforce mobility.

Our Purpose

We empower mobile people through meaningful connections, unbiased information, inspired ideas, and solutions.





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EVENTS Calendar

October 2022 | **Global Workforce Symposium 2022**
25-28 OCTOBER
Las Vegas, U.S.A.
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Webinars | **Webinar: Green Card Process for Nurses, Physical Therapists, and Med Techs**
Techniques that demonstrate the process for how HR/global mobility professionals can bring nurses, physical therapists, and med techs into their U.S. company from around the world via a green card.
Presented by WR Immigration
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Webinar: The Impact of the Ukraine Crisis on Global Mobility
Panel session providing insights on the impact of the Ukraine crisis on the global mobility industry, the people caught up in the crisis, and the implications for current and future business in the region.
Presented by Worldwide ERC®, Executive Mobility Group, Altair Global, and Deloitte-UK
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Webinar: Resilience: The Art of Recovering From Setbacks
What have we learned from the COVID-19 pandemic, and how will HR and mobility leaders transform their organizational capabilities in today's environment?
Presented by ADP, Tronox, At Ease Solutions LLC, SRG ADVISORY, and Welch Relocation Consulting
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Game On

Just when we thought remote work was the name of the game, the game has changed—again.

Worldwide ERC®'s latest research in remote work finds “a drastic change from perceptions at the height of the pandemic—like the steep drop in the number of employees in a full-time remote work arrangement and a work-from-anywhere promotion,” says Karen Cygal, senior vice president at Worldwide ERC. “What did not surprise us is the fact that employee mobility has become an even more powerful corporate tool for employee engagement.”

In other words, employees are demanding international work experience and are eager for the benefits of in-person collaboration, but they want to combine it with the flexibility of remote communication—all of which makes mobility more crucial than ever.

So, what's going to give us the edge when the game itself is always changing?

Technology—the equipment that enables our game play and strategies—is one answer. Innovations up and down the mobility value chain are handing employees the self-service options they want, while granting mobility teams the automation they need to focus on strategy.

“Technology will help companies win [the war for talent],” says Anni Keranen, ECA International, in our cover feature, “The Next Wave of Transformation,” on page 28. “As employees continue to ask for the flexibility to work from home or from anywhere, technology will help companies facilitate those benefits. And as far as compliance issues go, technology will help companies move people internationally in ways that follow all protocols, so they don't risk reputational damage or massive fines.”

Still, while technology may impact everything we do, the bigger answer is that it's about more than the equipment. It's about the players. We as mobility stakeholders may necessarily compete at certain times. But as on the very best teams, it's essential that we come together as peers and colleagues and work on answering the big questions none of us can solve on our own.

We saw this recently when Worldwide ERC convened its first-ever Sustainability Advisory Council to look at issues of climate change and the actions we can take to reduce our



carbon impact. While that work is ongoing, I look forward to the ideas that are sure to come out of those discussions.

And they don't all have to be big ideas. As part of his preparation for this year's Global Workforce Symposium, Eric Boles—keynote speaker, former NFL athlete, and president of The Game Changers—asked our members, “What's one small change that would make a big impact for mobility?”

It's an interesting question, and the answers could be game-changing. I hope you'll join us at the 2022 Global Workforce Symposium to find out.

Lynn Shotwell, GMS

President & CEO
Worldwide ERC®

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Moving Is a Contact Sport

BY TIM McCAFFERY, CRP, GLOBAL ACCOUNT MANAGER, SUDDATH

We have yet to develop a technology that can pack the kitchen dishes or wrap and carry a sofa down three flights of stairs onto a moving van. Even though we have witnessed limited autonomous vehicle capabilities, we are a long way off from the technology needed to navigate a 76-foot tractor-trailer into a tight residential area. In the sport of mobility, household goods moving services still need highly skilled hands behind the wheel: critical thinkers with an intense sense of urgency and a delicate touch to secure prized possessions.

PREPARATION AND TRAINING

Athletes spend years training for their sport. Moving crews, drivers, coordinators, and support staff likewise go through extensive training and achieve various levels of certification. Moving companies also regularly conduct training to remain compliant with regulations while adjusting to a post-pandemic environment.

INJURY AND EQUIPMENT FAILURE

Two risks that can't ever be eliminated in moving are human error and mechanical failure. The most skilled and experienced people make mistakes, the best tires still go flat, and carefully maintained engines fail at times. Due diligence and focused attention will minimize these occurrences. Acknowledgment, ownership, and structured recovery are critical components of maintaining trust and internalizing the lessons learned.

RULES AND PARTICIPATION

Many contractual and legal requirements regulate what moving companies can and cannot do. The individual being relocated also needs to be an active participant. Taking the time to read the documentation provided by the moving companies is a wonderful

place to start. Understanding the importance of proper scheduling and timing is critical. And, before signing any documents, relocating employees should read and understand what they agree to. Clarifying which party is liable in the event of a claim and what the mover or employer is responsible for is important preparation. It isn't always the mover's fault, and a new replacement item isn't always provided.

FANDOM

The key to retaining customers is making them fans. Going that extra yard starts with great relationships that have shared goals, but you also want to be transparent enough for them to be a part of the action and witness the successes. It is always a privilege to partner directly with clients and organizations that value relationships and directly support their suppliers. Having that direct relationship with your favorite moving company is like having a courtside seat at a championship game.

WORTHY OF GOLD

Every request for proposal creates a draft day for your business. It's worth considering the movers who train hard in their field of expertise, earning the trust to enter homes and to pack and safely transport families' prized possessions. They take personal pride in what they do, and simply offering them thanks for their efforts and service goes a long way. Sadly, many still view their roles as low-skill and regard them accordingly. However, there are people who have dedicated their lives to this industry. They sacrifice time with their families and focus their energies on preparation and training to deliver a superior performance each day.

Moving *is* a contact sport. Everything may not always go perfectly, but the players involved are just as skilled and worthy of a gold medal as some of our favorite athletes. *m*



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Executive Spotlight



Tracy Cole



Kevin Amatucci



Karen Bannon



Ronnie Blanchard

ARPIN ANNOUNCES PROMOTIONS

At Arpin International Group, Tracy Cole has been promoted to vice president of operations. Cole is a relocation professional who began her career in international household goods removals with Arpin in 1999. As vice president of operations, she is responsible for daily operations, international supply chain management, and existing account relationship management by providing client support services to Arpin's key global accounts, as well as the company's service teams managing the customer experience. Cole serves as Arpin's point person for requests for proposals, managing and maintaining the company's FIDI and CTPAT certifications, and monitoring industry-related ocean freight and customs and border systems.

Kevin Amatucci has been promoted to vice president of operations. He joined Arpin in 2013 and has more than 29 years of experience in the household goods relocation industry. Amatucci is responsible for the day-to-day management and strategic oversight of international corporate relocations and the domestic FastPAC program. This includes developing and implementing account management teams for Arpin's top clients, setting staffing goals, training team leaders, and serving as a point of escalation for the operations team. He also maintains key account relationships and manages Arpin's domestic supply chain in conjunction with key staff. Additionally, he oversees the development and implementation of service recovery procedures, ensuring that Arpin meets all key performance metrics as provided in service-level agreements and Arpin's own standard operating procedures. Amatucci serves as a board member of Arpin Charitable Fund Inc. aka Arpin Strong, a 501(c)(3) charity formed to provide a unified approach to the company's corporate giving.

Karen Bannon has been promoted to director of marketing and ESG. Bannon

has nearly three decades of moving and storage industry experience. In her new role, Bannon is responsible for managing and reporting on sustainability initiatives to minimize the company's environmental impacts and maximize its positive contributions to the world in close partnership with cross-functional global teams. She retains overall responsibility for global brand management, content creation, corporate identity, digital presence, and leadership in the development of long- and short-term marketing strategies in coordination with divisional stakeholders. Bannon also serves as vice president of Arpin Strong, overseeing its global corporate social responsibility initiatives.

Ronnie Blanchard has been promoted to general manager, GSA services. In his new role, Blanchard is responsible for daily operations, account management, oversight of domestic moves, management of claims, and assistance with the creation of internal templates—all while maintaining a highly efficient and motivated operations team. He also leads the effort to support GSA team members' growth and professional development, provide leadership and training to coordinators to ensure adherence to Arpin's standard operating procedures, and educate staff on individual account needs. Blanchard retains responsibilities as supervisor for high-profile moves while assisting the GSA division with establishing long-range plans. He joined Arpin International Group in 2014 and is a member of LACMA, FIDI39, and IAM Young Professionals clubs.

CAPRELO PROMOTES SIMMONS

At CapRelo, Liz Simmons has been promoted to vice president of global operations and international HR compliance.

Simmons has been with CapRelo for nearly five years, last serving as director of operations. She manages a team of global mobility consultants in the EMEA and APAC regions to deliver operational and

The relocation event of the year is upon us.

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Liz Simmons

HR support for entities in the U.K., India, and China. In her expanded role, she is responsible for the strategic planning, design, and delivery of services for global relocation and/or global compensation activities. She builds staffing plans and supports related training, coaching, and talent development, optimizing performance and profitability while balancing HR compliance requirements for non-U.S. locations.

Based in the U.K., Simmons has more than 25 years of global mobility experience as both an in-house and outsourced partner. She is a member of the U.K. Chartered Institute of Personnel and Development. Prior to working at CapRelo, she served in global mobility roles at Xerox, Motorola, and Arthur Andersen.



Allison Wax

COLDWELL BANKER PREMIER REALTY PROMOTES WAX

Coldwell Banker Premier Realty, a Women’s Business Enterprise National Council–certified business in Las Vegas, has promoted Allison Wax to vice president of client services. In her new role, she leads the company’s initiatives to enhance both national and local sources of business such as corporate relocation, referrals, and affinity programs.

“Allison is going to take the division to the next level with her keen attention to detail and creative approach to business development,” says Molly Hamrick, president and COO of Coldwell Banker Premier Realty. “She will no doubt continue our tradition of award-winning performance.”

Wax was Premier’s director of business development and client relations, a position in which she worked closely with local and national corporations and organizations to assist with their relocation and real estate needs. Prior to that, she worked with another local broker for 14 years and in a variety of relocation and real estate industry–related roles.

The WBENC certification validates that a business is at least 51% owned, controlled,

operated, and managed by a woman or women. This means one or more women must have unrestricted control of the business, a demonstrated management of day-to-day operations, and a proportionate investment of capital or expertise. To become certified, business owners undergo a thorough vetting process, including review of business documentation and a site visit. Because of this thorough process, WBENC certification is considered the gold standard for women-owned-business certification.

ODYSSEY MAKES SEVERAL NEW APPOINTMENTS

Odyssey Relocation has made several appointments in recent months that expand the company’s global leadership and operations. “At this time, as various countries and companies emerge from a pandemic, we understand just how important talent management has become for our clients, and, as such, our goal is to put together the best global team to help support our clients’ global relocation needs,” says President Scott Carroll.

Odyssey has appointed Dean Rischitelli as its vice president of global business development. His responsibilities encompass driving new client acquisitions, determining sales strategy, accelerating Odyssey’s brand awareness, developing new sales and marketing channels, and helping strengthen Odyssey as a market leader in relocation employee experience and innovation.

Angela Kobayashi, CRP, GMS-T, was named director of global operations. As such, she oversees the daily activities of Odyssey’s team of relocation consultants and provides strategic support to its clients. Prior to joining Odyssey, Kobayashi worked at TheMIGroup and Weichert Workforce Mobility as an engagement manager.

Daksha Hirani, GMS, was appointed director of global services, EMEA, in Odyssey’s new London office, where she will be responsible for helping to grow the company’s European operations. Hirani



Dean Rischitelli



Angela Kobayashi





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Daksha Hirani



Delia Ho



Lynn Wagner



Patti Cucci

oversees operational and service delivery within EMEA and will work closely with local supplier partners and client mobility teams based throughout Europe. She brings with her more than 15 years of experience, having started as a London letting agent at Foxtons. Prior to coming to Odyssey, Hirani was with Altair Global as a global operations manager and Santa Fe Relocation as a regional operations manager, EMEA.

Delia Ho, GMS, was promoted to the role of manager of global operations for Odyssey, a position in which she will be responsible for managing its global mobility services. With more than 15 years of global mobility experience, Ho joined Odyssey in 2016 as a senior global relocation consultant. Since that time, she has professionally supported more than 1,000 Odyssey global assignees and their families in moving to a new location and was instrumental in helping Odyssey open its London office in July 2021. Prior to joining Odyssey, Ho worked for both Paragon and SIRVA Relocation, based in their Hong Kong offices.

REA WELCOMES WAGNER AND CUCCI

REA—Partners in Transition has named Lynn Wagner, CRP, GMS-T, as president to work alongside CEO Lorraine Bello, GMS-T. According to a company release, Wagner brings 25 years of experience in global mobility to help shape REA's strategic vision and drive business growth through best-in-class support to service partners, corporations, employees, and families on the move.

"I am very excited to help Lynn leverage her extensive experience in relocation and talent mobility services to develop innovative solutions to the many new talent issues facing organizations today," says Bello.

Wagner began her career in assignment management and later moved on to concentrate on coaching services for employees and families navigating relocation transitions.

REA has also named Patti Cucci vice president of communications and technology

solutions. Cucci has been with REA for more than eight years and has led its marketing efforts to redesign and continually enhance its brand strategy and earn awards around the globe over the past decade. She also directs REA's technology solution decisions.

TIRA ANNOUNCES NEW BOARD CHAIR

The International Relocation Associates (TIRA) has announced new Board Chair Jérémy Berthoux, who takes over for former Board Chair Sharon Michnay. Berthoux is managing director and president of Home Conseil Relocation in France.

"Our industry is seeing unprecedented numbers of mergers and acquisitions, which validates TIRA's long-standing approach to creating a sustainable community of independent, yet united, local providers," says Berthoux. "With these factors in mind, TIRA's board and I have established clear and ambitious goals that include increasing our membership by 50%, while maintaining our rigorous 'Stamp of Quality' standards and increasing the value of TIRA to its membership by providing more opportunities to connect, collaborate, and gain visibility in the global marketplace."

TIRA is also celebrating its 40 years in the industry and has announced a refreshed website, tiranetwork.com.

RELO DIRECT ANNOUNCES NEW APPOINTMENTS

Elizabeth Wackerlin has joined RELO Direct as director of client services. In this role, she oversees RELO Direct's front-line client services team, fostering a culture of accountability, compliance, and strong performance in a collaborative environment.

Wackerlin has 10 years of experience in the real estate and relocation industry. Prior to joining RELO Direct, she served as a client services manager and client strategic partner at a large relocation management company, managing operations and strategy of both domestic and international corporate

relocation consulting services. Her other previous roles include serving as a regional director for a national nonprofit and as a global assignment consultant at a niche relocation management firm. Additionally, Wackerlin has privately consulted on various translation, media, event, and writing projects for multiple organizations and supervised cultural au pair programs through a U.S. Department of State-designated organization.

RELO Direct also promoted Evan Miller to vice president of sales. In this role, he continues to manage the company's business development efforts within the U.S. government sector and assumes an expanded role in the corporate sector.

Miller joined RELO Direct as a client service specialist in 2007 and held various client-facing roles before becoming director of sales in 2014. Prior to joining RELO Direct, he worked for a real estate services company, where he specialized in relocation home sale programs.

Drew Phillips has joined the organization as vice president of sales. In this role, he manages the company's business development efforts in the western U.S.

Phillips has 20 years of experience in the real estate and relocation industry. Prior to joining RELO Direct, he served as the Western region director for a midsize relocation management company.

CORNERSTONE RELOCATION GROUP ADDS GERBA, BYRNE

Karen M. Gerba, SCRCP, GMS, has joined Cornerstone Relocation Group as vice president of strategic engagement. She will focus on strategic initiatives to enable growth, retention, and revenue through innovation, product development, leveraging relationships, consultative efforts, and creative pipeline building.

Gerba has more than 25 years of global mobility experience, including leadership roles in the corporate relocation mortgage industry. She is a recognized expert and top performer in sales, account management, negotiation,

supply chain, and multifaceted environments. According to a company release, she brings to Cornerstone considerable skills and insight, along with a keen understanding of the global economy's challenges and opportunities.

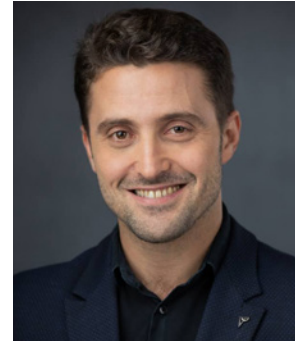
Hannah Byrne, CRP, GMS-T, has joined Cornerstone Relocation Group as vice president of global business development. She brings six years of experience in global mobility sales from both traditional and tech-driven relocation management companies, and she previously held business development roles at Global Mobility Solutions and UrbanBound. At Cornerstone, Byrne will focus on business development efforts in the Midwest, Northeast, and Southeast U.S. markets.

EXP REALTY PROMOTES NIXON

eXp Realty, a subsidiary of eXp World Holdings Inc., has promoted Cindy Nixon, CRP, to director of relocation, where she is responsible for overseeing, building, and managing services to support eXp's relocation business.

"With more than 14 years of experience in exceptional and personalized real estate service, Cindy is an accomplished industry educator, mobility specialist, and leader," says Dawn Conciatori, vice president of referral generation at eXp Realty. "Cindy's leadership is a foundational reason why the eXp Relocation team's growth hit the ground running and continues to climb. I am confident that Cindy's dedication and natural ability to build strong client relationships will continue to elevate eXp's performance in the relocation industry."

Most recently, in her role as relocation manager for eXp Realty, Nixon developed eXp's dynamic affinity programs, coordinated large group moves, and created industry training modules to establish and grow eXp's global team of relocation specialists. *m*



Jérémy Berthoux



Elizabeth Wackerlin



Evan Miller



Karen M. Gerba



Tech Solutions

Often, younger generations are more likely to be early adopters of new technologies. Established organizations and industries tend to be less agile and more risk-averse, and thus are slower to take up the bleeding edge. So, we asked young mobility professionals: **Can you suggest specific technologies or platforms that have fielded an exciting solution to a problem? What specific technologies are emerging that promise to change the industry in 2023?**



Some of the newest technology used in semitrucks has been helping household goods drivers operate more safely and efficiently, such as lane-keeping assist technology, object detection with digital dashboard alerts so

drivers stay a certain distance from the vehicle in front, adaptive cruise control with self-adjusting speed, and intentional aerodynamic design for fuel efficiency (at the time of this writing, diesel fuel costs almost US\$1 per mile traveled, increasing almost 70% YTD).

Other new technology includes Samsara's artificial intelligence (AI)-driven dash cameras with GPS tracking, which use the power of AI to help keep drivers safe by analyzing and sharing safety reports. Operations teams get real-time visibility of trucks with pinpoint accuracy at the click of a button, so teams can manage their fleet of trucks on one dashboard, anywhere in the U.S. This technology also has open-source application programming interfaces (APIs) to connect data across key apps and company programs.

The next wave of improvements will be customer-facing. In the future, GPS-tracking dashcams will allow real-time tracking of shipments at a moment's notice. Another example is customers receiving a link to view where their crew is on moving day, helping to ease worries through transparent information.

The American Trucking Associations also recently stated that there is a shortage of an estimated 40,000 truck drivers. Technology is needed to create efficiencies with our current industry capacity—ultimately doing more with less.

GUS ARMBRUSTER

Business Development Manager, Armbruster Moving & Storage



With the COVID-19 pandemic still ongoing, mRNA vaccines may have one of the biggest impacts on mobility in 2023. The reality is that infections impede talent mobility, and mRNA vaccines are easy to modify for new virus strains.



In addition, technologies that save time, save money, are easy to use, allow for self-help (autonomy), and have quick responsiveness capabilities are going to be most attractive to both employees and companies. I see flexibility, choice, and care as critical elements of the kind of corporate culture that employees want. Companies are grappling with attracting, developing, and retaining talent, and it is imperative they provide tools offering those three critical elements. Point C is a newer innovative mobility benefits platform that gives employees nearly infinite choices in designing their relocation experiences while allowing the company to tailor the investment level. I think it is on the cutting edge of strategic policy design and provides an edge to a company's mobility program.

MIKE FITZGERALD

Director, Business Development, Plus Relocation



An organization must ask itself questions like: “What are we trying to achieve?” and “What are the most important issues we need to solve this quarter?” Because these can be difficult to answer, organizations often find themselves in a state of analysis

paralysis. Instead of taking a calculated risk for potentially massive benefit, organizations might get overwhelmed and end up forgoing technology adoption altogether. Typically, this is a mistake.

When an organization takes the time to consider these tough questions, it can then begin thinking about the types of technologies and partners to work with to meet their goals. For many organizations, the answers revolve around revenue generation and productivity gains, so careful thought must be given to where such initiatives would have the greatest impact. The best partners will help the organization achieve those goals in a way that is simple and dovetails neatly with the organization's existing practices. At Spruce, we focus on partnering with our customers on technology integration and products to reduce touch points for their real estate title and closing process. This can save time, increase throughput, and ultimately increase revenue. Digital solutions such

as remote online notarizations, DocuSign, API, and client portal access keep the real estate industry moving forward.

Overall, it's largely worth the time and effort to closely examine and implement modern technology to help streamline and maximize your business.

FAYE S. HOXWORTH

Vice President, Strategic Partnerships, Relocation Services, Spruce



Most mobility suppliers and customers are not data-poor. So, why is the moving industry one of the slowest on the planet to innovate? Because it is not good enough to have a ton of good data. It is not even enough to have a tech solution that can

analyze those tons of data. The organizations that promise to change the industry are those that use analyzed volumes of data to enable decisions.

Over time, MiniMoves saw a higher volume of small moves. So, it built a supply chain to service only those. When the data said that labor was becoming an issue, it revisited industry-standard payment terms.

Orion started off as an expense management tool. But people outside the mobility team within their customers' organizations also needed to manage payments. Now Orion helps with candidate expense reimbursement for out-of-town interviews.

PricePoint saw a lack of transparency between movers and built a platform on which pricing is selectively shared. When corporate customers needed to revisit their supply chain, we benchmarked spend and ran RFP alternatives.

The data these companies acted on included listening to their customers—but not necessarily to what their customers asked for. If Henry Ford had his customers describe what they needed, they would have said a faster horse. People are terrible at articulating what they want. Successful companies listen to customer pain and build solutions that address that pain. *m*

JESSICA PETZEL

Director, PricePoint

New Approaches to Data Privacy

BY TRISTAN NORTH



As the mobility industry continues to rely on technology to provide new capabilities and time-saving efficiencies, the security and protection of data that fuels many of these advances becomes increasingly important.

Few are more qualified to talk about these issues than George Powdar, chair of Worldwide ERC® Public Policy's Compliance Forum. Powdar is senior vice president of global reporting and compliance for relocation management firm Altair Global and has spent more than 35 years in the mobility industry.

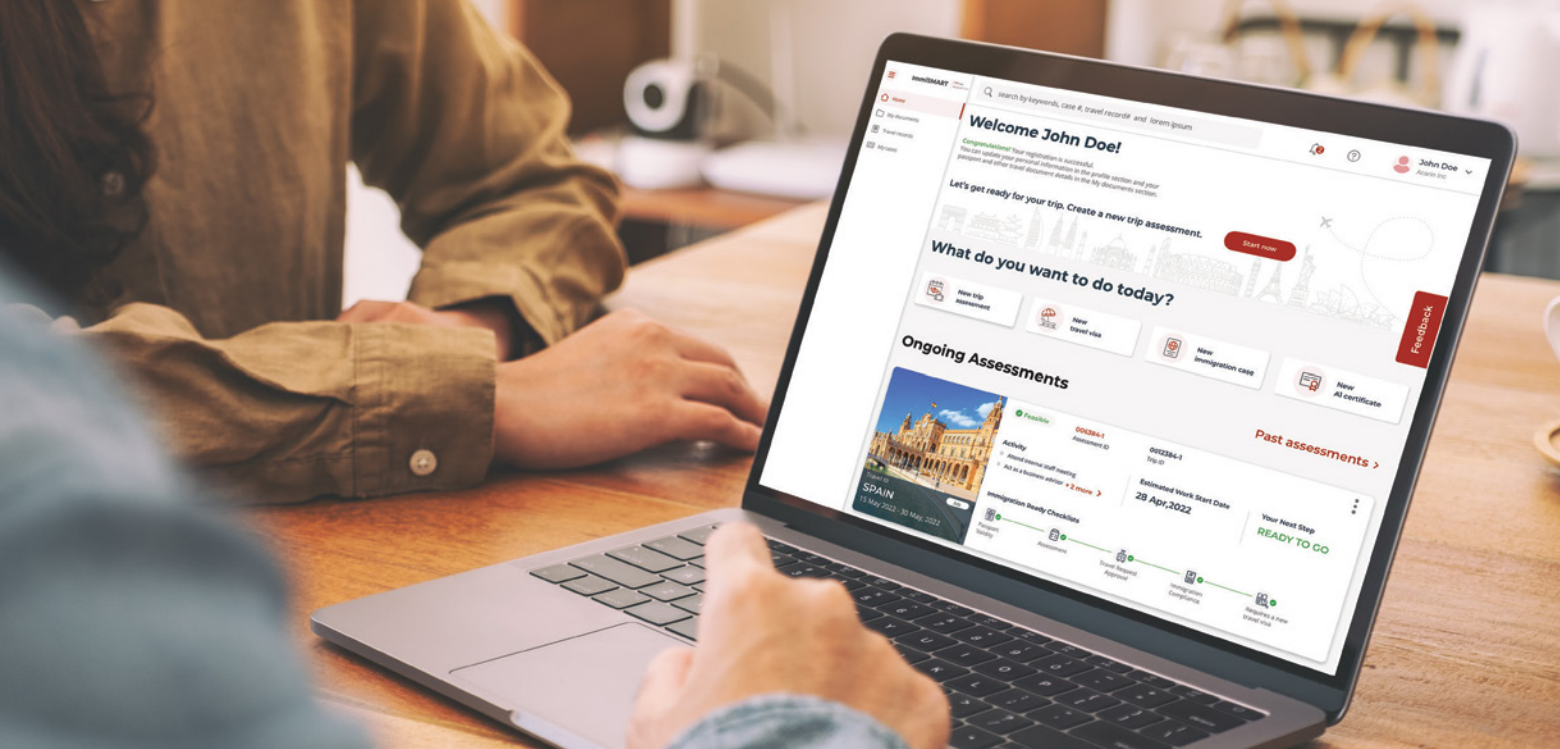
TN: How is the global workforce mobility industry dealing with the myriad data privacy and protection standards in the U.S. and around the world?

GP: Data privacy protection laws and requirements are some of the top issues impacting the industry. While the data we collect, store, and

share is critical for the services that relocation managers provide to their clients, the process for protecting this information is not always straightforward.

Since the European Union introduced the General Data Protection Regulation (GDPR), which went into effect in 2018, we have seen several countries, as well as many states within the U.S., pass or discuss data privacy laws, which is a big step in the right direction. In the U.S., we have four states that have now passed laws, and a bipartisan group in Congress is discussing the implementation of data privacy laws at the federal level.

But around the world—including in Europe—we have also seen many changes or enhancements to data privacy laws. So even though we've had the GDPR since 2018 and 27 countries have signed on to those data privacy laws, we continue to see specific exemptions or interpretations regarding some of the regulations.



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As such, the lack of a unifying standard means that not only must we keep up with these changing requirements, but that the structures we have established to meet these requirements must be continuously updated and monitored.

TN: Are organizations adapting one set of internal policies that adhere to all the different privacy standards? Or, are they taking different approaches depending on the requirements governing a particular set of data?

GP: The GDPR basically sets the framework for how data privacy laws should be managed and what those privacy requirements should be. For the most part, other countries—and here in the U.S., states like California and Virginia—are using a similar framework. That’s a good thing.

On the other hand, the guidelines don’t incorporate all the different standards. So, ensuring compliance requires an ongoing review of these new laws, as well as continual monitoring, which can be difficult.

TN: To your knowledge, are there provisions of different data privacy laws that contradict one another? For example, what about the length of time you can retain someone’s data?

GP: Yes, there are differences. At Altair, we comply with those data retention requirements at the client level. In the U.S., for example, we have a seven-year data retention requirement, which is driven primarily by tax laws. In Europe, that requirement can vary by country. So, to ensure that we at Altair comply with the various data retention requirements, they’re set within our agreements with our clients.

In addition, we have had to address the customer’s rights within privacy laws. As an example, within the GDPR and in California, the customer has the right to determine how long we keep their data and can request companies to delete their information at any time. Therefore, to ensure compliance, we establish policies and



So, now it’s not only a requirement on an RMC that they can protect a customer’s information, but we are also required to make sure the suppliers we use, especially the smaller ones, can meet the data protection requirements.

procedures within client agreements to make sure this issue is addressed.

TN: In June of this year, a bipartisan group of U.S. Congressional committee leaders unveiled a federal data privacy standard for the U.S. If enacted, what are the key provisions that you believe need to be included?

GP: There is obviously a considerable amount of interest in a national data privacy standard that would supersede state requirements. I think such a law would make it easier for companies, including the relocation management companies, to comply. That’s the model Europe has already adopted. With GDPR being four years in practice, I think most organizations have policies and procedures to comply. If the U.S. law can model what GDPR does, even though many of the states are already doing similar things, I think that would be a big benefit.

Clearly, the law should also address customer rights the way the GDPR does, where customers would have rights in terms of an organization’s use of their information. I would also like to see some form of threshold placed on the size and types of companies required to comply. A large percentage of Worldwide ERC’s membership, especially on the supplier side, is made up of smaller organizations. Requiring small organizations to abide by these regulations will place a financial strain on companies

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that might not have the financial resources to meet all those requirements.

TN: The Worldwide ERC Compliance Forum, which you chair, has been leading the way on protecting the personally identifiable information of transferees who are shipping their household goods to the U.S. Do you see other areas of particular concern when it comes to data privacy and relocation?

GP: One of the things that we see today—and it's also happening right now in Europe—is an increased focus on the transferring and/or sharing of customer information to other countries. As a supplier or a relocation management company, we collect a tremendous amount of information from our customers and their families, and we have to demonstrate that we can securely store that information within our organization. But when you must share that information with other third-party suppliers, either within the country or cross-border, there is an increased risk. So, now it's not only a requirement on an RMC that they can protect a customer's information, but we are also required to make sure the suppliers we use, especially the smaller ones, can meet the data protection requirements. From an organization's perspective, that puts a tremendous

burden on RMCs, because now we're basically responsible for ensuring that whoever we use can meet these contractual requirements.

TN: What other areas in your forum deal with technology's impact on mobility?

GP: From a technology perspective, obviously data protection is a major issue for us because many of our organizations have had to invest in technology that showed we could comply with the data privacy regulations. Now, we find that we are responsible not only for using the latest technology for storing and maintaining the accuracy of the data, but we have to ensure that we're adopting the latest and most effective technologies to defend against things like hacking and the increase in cybertheft.

In addition, organizations are focusing a lot of attention on compliance reporting, whether it is built around data security; human rights; capital resources; or environmental, social, and governance factors. All contain different regulations or policies that have to be met or followed, and each adds a layer of complexity to the reporting structure. *m*

Tristan North is the government affairs adviser for Worldwide ERC®. He can be reached at +1 703 842 3400.



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The Numbers

Remote Work

To illuminate how the confluence of remote work and mobility continues to evolve, Worldwide ERC® has built upon its groundbreaking 2021 research with a new, in-depth study, *Remote Work: The Road to the Future*, which brings together the voices of more than 500 chief human resource officers and other senior HR leaders, as well as nearly 100 corporate mobility leaders. Overall, we find that:

- Remote work is driving employee mobility.
- Global mobility's role is more critical than ever.
- Remote work is hybrid work.
- Mobility is now for the entire workforce.

For the full study, visit worldwideerc.org/research.

Percentage of hybrid workforce that will use each type of schedule

	Senior HR	Corporate Mobility
1 day in office or on-site, 4 days remote	30%	25%
2 days in office or on-site, 3 days remote	34%	40%
3 days in office or on-site, 2 days remote	10%	20%
4 days in office or on-site, 1 day remote	5%	2%

Main factors that determine which roles are best suited for on-premises work, remote work, or hybrid work

Note: multiple selection

	Senior HR	Corporate Mobility
Job level	53.88%	42%
Country or region	27.13%	32%
Function	70.35%	86%
Tenure	31.01%	6%
Performance	55.43%	36%
Responsibility	67.64%	54%

How organizations are legally administering their employment in locations where they do not have permanent establishment for taxation purposes or a legal entity

Note: multiple selection

	Senior HR	Corporate Mobility
Establish a new legal entity	48%	17%
Global employment organization	43%	21%
Professional employer organization	64%	21%
Employer of record	38%	33%
Other, please describe	0%	38%

How organizations are determining their remote workers' compensation

Note: multiple selection

	Senior HR	Corporate Mobility
Tying to our current compensation model	65.50%	67%
Creating new global bands for remote workers	40.50%	3%
Creating new bands for specific locations and markets	37.02%	17%
Ad hoc job pricing based on specific locations	30.62%	12%
Other, please describe	0%	10%

Primary reasons, in order of importance, that organizations are creating or considering voluntary, short-term programs

1	Improve talent retention
2	Improve talent acquisition
3	Provide employee flexibility
4	Reward high-performing talent
5	Create a more globally aware and connected organization
6	Other, please describe

Benefits organizations are delivering differently for remote and hybrid employees

	Senior HR	Corporate Mobility
Wellness	63.41%	67%
Professional development	71.01%	33%
Home office setup/equipment	67.39%	67%
Employee assistance programs	56.52%	33%

45%

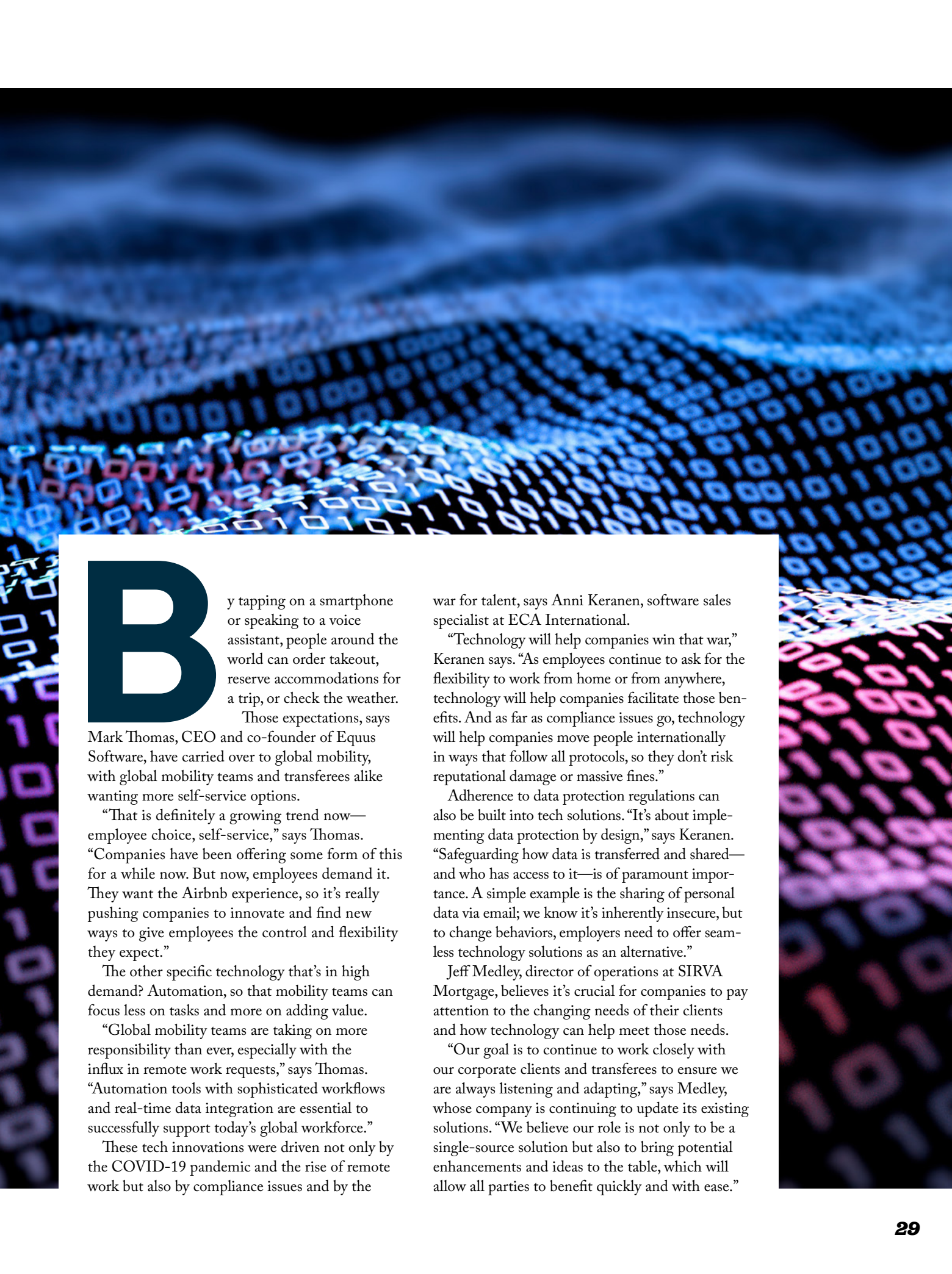
Total workforce that's currently working hybrid in office or on-site and at home

THE NEXT WAVE OF TRANSFORMATION

Self-service and automation are in high demand as new technologies emerge across the mobility value chain

By Tina Nazerian





By tapping on a smartphone or speaking to a voice assistant, people around the world can order takeout, reserve accommodations for a trip, or check the weather.

Those expectations, says Mark Thomas, CEO and co-founder of Equus Software, have carried over to global mobility, with global mobility teams and transferees alike wanting more self-service options.

“That is definitely a growing trend now—employee choice, self-service,” says Thomas. “Companies have been offering some form of this for a while now. But now, employees demand it. They want the Airbnb experience, so it’s really pushing companies to innovate and find new ways to give employees the control and flexibility they expect.”

The other specific technology that’s in high demand? Automation, so that mobility teams can focus less on tasks and more on adding value.

“Global mobility teams are taking on more responsibility than ever, especially with the influx in remote work requests,” says Thomas. “Automation tools with sophisticated workflows and real-time data integration are essential to successfully support today’s global workforce.”

These tech innovations were driven not only by the COVID-19 pandemic and the rise of remote work but also by compliance issues and by the

war for talent, says Anni Keranen, software sales specialist at ECA International.

“Technology will help companies win that war,” Keranen says. “As employees continue to ask for the flexibility to work from home or from anywhere, technology will help companies facilitate those benefits. And as far as compliance issues go, technology will help companies move people internationally in ways that follow all protocols, so they don’t risk reputational damage or massive fines.”

Adherence to data protection regulations can also be built into tech solutions. “It’s about implementing data protection by design,” says Keranen. “Safeguarding how data is transferred and shared—and who has access to it—is of paramount importance. A simple example is the sharing of personal data via email; we know it’s inherently insecure, but to change behaviors, employers need to offer seamless technology solutions as an alternative.”

Jeff Medley, director of operations at SIRVA Mortgage, believes it’s crucial for companies to pay attention to the changing needs of their clients and how technology can help meet those needs.

“Our goal is to continue to work closely with our corporate clients and transferees to ensure we are always listening and adapting,” says Medley, whose company is continuing to update its existing solutions. “We believe our role is not only to be a single-source solution but also to bring potential enhancements and ideas to the table, which will allow all parties to benefit quickly and with ease.”

Strategic Partnerships

Mobility providers aren't necessarily innovating by releasing new features built in-house. Some are leveraging strategic partnerships to streamline the process of putting new technology in front of their clients.

MOVING

ATLAS WORLD GROUP AND YEMBO: VIRTUAL HOME SURVEYS

According to Chief Information Officer David Smith, some of Atlas World Group's largest van line agents were already using Yembo—a provider of virtual home surveys—to assess the type and number of possessions transferees needed to move.

"[They found] improved customer service and internal efficiencies, making it a win-win to integrate with their [artificial intelligence (AI)] platform," says Smith.

That integration went live this year and is giving movers and transferees significant flexibility, says Smith. "If you go back to an old model, somebody would have to schedule a time for the transferee to meet with us at their place," he says. "We would have to go in and physically assess all the things that are there and create that list and that table of measures ... to eventually generate an estimate for a transferee on what they have."

With Yembo, transferees have the option to run those surveys whenever they want. "They actually can take their phone and use Yembo to take a video of their house and all the items that are there," says Smith. Yembo's AI then analyzes the items so it can later build an estimate, and Atlas agents review and validate that information.

CORPORATE HOUSING

SYNERGY AND CODEONE: SUPPLIER AND TRANSFEEE CHOICE

Suppliers and transferees want more choice when it comes to housing, and Synergy is putting more options at their fingertips, says the company's head of information technology, Lance Bradwell.

Synergy Global Housing's innovation lab, REVE, recently invested in Coded and its application programming interface (API)-friendly corporate housing software platform, CodeOne.

Bradwell says the Synergy team views technology as "an enabler to the guest experience," not a

replacement for it. "The unique ability to connect different suppliers on their own terms and present options on an equal footing for any housing request means that the transferee can choose their accommodation based on what's important to them—be it location, price point, green credentials, or any other criteria," he says.

As other suppliers begin populating the platform, they'll be able to "share their housing inventory with clients and potential guests," says Bradwell. "In addition, CodeOne's ability to connect to other external accommodation providers will create an ecosystem, increasing the array of options presented to the transferee that are bookable in real time."

TAX AND IMMIGRATION

BENIVO AND VIALTO PARTNERS: RELOCATION ESTIMATE ACCURACY

According to Benivo founder and CEO Nitzan Yudan, real-time automation and data transparency are two things the world outside of mobility relies on. However, automation is only beginning to enter the global mobility space, and while the industry produces significant amounts of data, it has not leveraged it anywhere close to its potential.

Yudan and his team want to change that.

Benivo announced in July 2022 the release of Smart Cost Estimates, created with Vialto Partners, which offers a range of tools for global mobility, tax, and immigration. Benivo entered the partnership to address multiple pain points for global mobility teams, but specifically, relocation estimates—which take a long time to develop internally, cost a significant amount of time and money, and may still have some inaccuracies.

The partnership will enable global mobility teams to quickly run customized calculations, as well as "unlimited what-if scenarios." Teams can access AI-powered processes and insights, keep track of estimate-to-actual spending in real time, and receive instant alerts when estimates are approaching actuals.

Yudan adds that more is to come. Throughout the next several months, Benivo will "continue to improve the AI algorithm to automatically identify cost-saving opportunities and run scenarios that

optimize costs and provide businesses with a complete view of all options for smart decision-making.”

SUSTAINABILITY

CORPORATE TRAVELER, THRUST CARBON, AND TREES4TRAVEL: CARBON EMISSION REDUCTION

Business travel comes with environmental impacts. So, Corporate Traveler partnered with Thrust Carbon and Trees4Travel to help play a part in reducing those impacts.

Thrust Carbon provides accurate data on carbon emissions through integration into Corporate Traveler’s reporting suite and booking technology, and Trees4Travel provides an easy way to offset carbon usage. Combined, the two partnerships offer accuracy and simplicity, says John Morhous, Corporate Traveler’s chief experience officer of corporate brands at Flight Centre Travel Group, its parent company.

They’re also representative of a broader industry trend of “being more mindful over creating a sustainable travel program.”

“These kinds of products and features have been available in our enterprise-focused brand for several years, so seeing them becoming more necessary in small- and medium-sized enterprises indicates that the broader market is starting to focus on sustainability, which is a good thing for our planet,” says Morhous.

MOBILITY POLICY

WEICHERT AND SALESFORCE: GLOBAL MOBILITY SOLUTIONS

Mobility isn’t one-size-fits-all, and Weichert wanted to give its clients a range of solutions that would help them navigate different types of mobility, including lump sum, business travel, relocation assignments, and core-flex, according to the company’s senior vice president of technology, Stewart McCardle, CRP, GMS-T.

Weichert teamed up with CRM solution Salesforce to build a central hub of those types of tools—a new platform called Go. Now it’s taking its partnership with Salesforce further. AI—in particular, natural language processing and machine learning—is “being used to introduce new tools and features like chatbots, automation, predictions, recommendations, and voice integrations,” says McCardle.

Using the power of Salesforce’s AI, Weichert can accomplish three main goals for its client base: help clients make better decisions, provide guidance on next steps for customers, and automate and improve productivity for its counselors, he says.

However, McCardle stresses that technology shouldn’t be the industry’s sole focus. It should be viewed as a supplement to the services that organizations such as his provide to global mobility teams. “Relocation is exciting but also causes anxiety, fear, frustration, and uncertainty,” he says. “Systems are great at providing data, details, updates, and running processes—but nothing replaces the way a skilled human can listen to the customer or client and provide the reassurance and guidance to help them with their emotional needs.”

SUPPLY CHAIN

CIBT AND CLEARVIEW TRADE: IMPROVED DOCUMENT FLOW

“Fragmented data and document flow cause supply chain inefficiencies,” says Carlos Claro, CIBT’s managing director Europe – document services. “Goods and payments are delayed, increasing the amount of capital tied up in the supply chain. The increased risks of noncompliance with regulatory requirements due to manual processes often cause delays in transportation, customs clearance, and delivery, which can lead to cancellation of orders, spoiling of perishable cargoes, or loss of future business.”

With its partnership with ClearView Trade, an export document software solution, CIBT wants to ease those challenges for exporters.

“The solution enables CIBT’s clients to create, manage, store, and transmit their trade documents from one source of data, which dramatically reduces the risk of error from rekeying information or translating data,” says Claro. “Processes also speed up, while enabling even last-minute changes to order details prior to submission.”

As one example, CIBT’s customers in the U.K. and EU will be able to “obtain true paperless certificates of origin that can be shared with customs authorities and consignees, reducing the requirement for printed forms and cost for post or courier deliveries.”

New Capabilities

While partnerships can be powerful routes, some leaders in global mobility have built their own solutions in-house, unveiling new capabilities that put them at the frontier of innovation.

EMPLOYEE EXPERIENCE

AIRES: ANSWERS THROUGH VOICE TECHNOLOGY

“Alexa, what’s the status of my shipment?”

Aires wanted to offer its clients’ transferees a quick way to get their questions answered with the development of the Aires Voice Assistant (AVA), an Amazon Alexa Skill.

With self-service a theme across the mobility industry, the steps to get that self-service can be multilayered, says Anand Diraviyam, director of product strategy and management at Aires.

He paints an example of a transferee who has a question about their move at 2 in the morning. To get that answer, they previously had to log into Aires’ web portal or mobile app. But with AVA, the voice augments the experience.

“Now, they’re able to ask the question, and Alexa will do all the work and then give them the details on an interactive, Wi-Fi-based communication, which they are so used to with other consumer apps,” he says.

REAL ESTATE

ASTEROOM: ENHANCED DATA CAPTURE

In August, 3D-tour technology company Asteroom formally kicked off a data capture service for one of Freddie Mac’s offerings, ACE+ PDR, so stakeholders can get the property data reports they need with fewer obstacles.

The service is a continuation of the desktop appraisal data collection service the company was already offering, says Chris Garrett, Asteroom’s chief revenue officer.

The number of appraisers in the U.S. is dwindling a bit each year, Garrett explains, leading to issues “with rising prices and increasing lengths to complete appraisals.”

“Looking into the future, a world where properties can be appraised virtually will cut down on travel times and costs and bring greater efficiency to the appraisal industry that other countries may look to model,” says Garrett.

Asteroom’s trained certified data collectors, many of whom are active real estate agents, use an Asteroom 3D tour kit, along with the Asteroom mobile app, to create property condition reports, which include floor plans, 3D tours, and photos of each property’s interior and exterior. With the mobile app, they’ll be able to record the specifications Freddie Mac set under their property condition questions for their ACE+ PDR offering.

“After that data is collected, they send it to Asteroom,” says Garrett. “We have a quality assurance team that’s going to review everything and put together a final report that’s then shared within 24 hours of the information being given. [Then that report’s] going to be delivered back to whoever places the order. So from start to finish, orders are going to be done in two to three days nationwide.”

IMMIGRATION

CIBT: GREATER CLARITY TO BUSINESS TRAVEL

In recent years, the global travel industry has been shaken by COVID-19, Brexit, regional regulatory changes and instabilities, war, and other painstakingly nuanced travel restrictions, says CIBT’s Katya Kolmogorova, senior product manager.

These events, she continues, have “created a need for reinforced compliance checks for business travel.” Companies must make sure that business travelers comply with visa and immigration rules and also have access to in-country regulations, posted worker notification requirements, Social Security coverage, transit restrictions, and other considerations.

With its new version of ImmiSMART, CIBT’s visa and immigration software solution, business travelers will receive “digestible blocks of calculated assessment results and instructions,” says Kolmogorova, along with information on whether or not their planned travel dates are “feasible, what alternative travel dates and work start dates are available, which requirements and any exemptions may apply to them,” and more.

Newer Companies on the Scene

Companies of all ages are innovating by adding new capabilities, entering partnerships, or both.

The past decade has also brought new companies with fresh ideas to the global mobility industry.

CORPORATE HOUSING

RELOQUEST: OPTIMIZING SHORT-TERM HOUSING BOOKINGS

New technologies “are rapidly replacing inefficient manual approaches,” says Jeana Giordano, ReloQuest’s global director of marketing communications.

For example, ReloQuest, founded in 2015, has RQ Pro, a cloud-based sourcing platform for global mobility teams, business travelers, and transferees.

According to Giordano, one goal is to ensure that booking temporary accommodations is stress-free and price-transparent. Its technology solution allows global mobility teams to compare pricing and supplier performance, including response times, service issues, and resolutions; survey feedback from traveling employees; and more.

Other features include RQ Pro’s Service Tracker, which documents and tracks service issues, manages response times, and communicates resolutions; DirectConnect, which gives travelers and transferees live, 24/7/365 hand-held customer support; and automation of expense workflows thanks to payments technology within RQ Pro.

EMPLOYEE EXPERIENCE

PIVT: CARING FOR THE WELL-BEING OF MOBILE EMPLOYEES

Moving somewhere new is an exciting, life-changing experience, but it is also riddled with stress, relationship strain, and loneliness.

That’s where Pivt steps in. Founded in 2019, Pivt is a social platform that helps transferees craft their vision for how they want to live, build and cultivate a support community, and maintain a healthy and strong mindset throughout the journey. “We help employees and their families feel a sense of belonging wherever they live and work,” says Pivt COO Chris Roberts. “Loneliness in the mobile workforce should be a thing of the past, and it’s our mission to make that happen.”

The ongoing pressure of supporting employee experience and retention has caused a surge in investment in employee-focused solutions, says

Roberts. As such, Pivt is now working on new features to nurture connection and wellness based on the insights it gains from user data. “At the same time, we’re investing in our analytics platform to provide valuable insights to mobility teams and HR groups,” says Chief Product Officer Matt Sasso.

IMMIGRATION

RELOCATE: EASING MOVES AROUND THE WORLD

Launched in 2021 by immigration attorney David Cantor, Relocate gets at the heart of the global mobility industry: helping people move around the world with as much clarity and convenience as possible.

Designed for individual and corporate clients, Relocate connects people on the move with “high-quality migration practitioners throughout the world.” If someone wants to, say, live in Tokyo for six months, they can use Relocate to find a licensed, vetted legal expert in Japan to help them navigate that process. The practitioners, which Relocate calls advisers, also pay a monthly fee to be part of its ambassador program. They include attorneys, immigration and cross-border tax professionals, relocation specialists, digital nomad mentors, and remote work specialists.

Like others, Relocate is also exploring migration automation technology. “While we believe in streamlined automation technology, our partners envision more value being added to the emotional aspects of this journey—where you can spin the world, get on-demand answers in a trusted community ecosystem, and feel that your next destination is easily within reach,” says Cantor.

He adds that with the uptick in remote work, governments and private companies such as his will continue to make it easier for people to get from one place to another. “Just look at what happened this summer. The UAE, Germany, Greece—all these national governments have already struck deals to fill labor shortages. This is unprecedented in the history of migration. I do believe—and I am an optimist—that the world is just going to be a bit easier to transcend.” *m*

Tina Nazerian is a writer in Houston.



NEW WAYS FOR INTERNATIONAL
**ONE-WAY
TRANSFERS**



One-way moves used to be just for permanent transfers, but global mobility is finding creative ways to apply this policy approach to save costs, support remote work, and give employees the flexibility they want

By Grace Kernohan

In the past several years, global mobility has evolved tremendously. Historically, the mobility function has been process-oriented, focusing on moving talent compliantly with minimal exceptions. Today, mobility teams have become more strategic, using their knowledge of their program and the business, working to offer solutions to ever-changing situations, and stepping into a new role as a company adviser. This transition from processing to counseling makes sense: Mobility professionals have seen which talent deployments work well and which don't.

And what is mobility advising on lately? First, they're helping guide what policy types are needed to solve mobility needs within the organization by picking the right set of solutions. Second, mobility is advising on best practice when using a particular approach.

One approach playing an increasingly prominent role is one-way transfers, traditionally used for permanent moves. Recently, these transfers have been the right policy choice for many more scenarios, such as for early-career volunteer moves and remote work requests. With so many employee scenarios appropriate for this policy type, it has become more important than ever for mobility to step up and strategically design the right types of one-way policies, as well as advise when each solution should be used—for example, when a one-way transfer policy is preferred over defaulting to a traditional assignment or when a move to a new location is approved for remote work reasons.

Creative Use Cases

Before understanding how mobility is now using one-way transfers strategically, it's important to understand what a one-way transfer is and how programs were using this policy historically.

For the employee, a one-way transfer involves being placed on local salary and paying local taxes. From the mobility perspective, relocation support is provided with limited or no ongoing allowances such as tax equalization, education, housing, or cost-of-living adjustments. In summary, the employee is expected to live like a local. For the business, one-way transfers are traditionally used for permanent relocations, in which the employee's job is relocating to another country with no further mobility planned.

In recent years, mobility has found more applications for this policy beyond the traditional: leveraging the approach for situations that once attracted a full expatriate package. For many companies looking to save on high-cost items such as tax equalization or cost-of-living support, a one-way relocation allows companies to move their talent compliantly without guaranteeing any conservation of the employee's home standard of living. For financial and professional services companies that send talent

between well-developed locations, a one-way transfer facilitates relocation between similar compensation schemes with comparable cost of living—no ongoing support needed. Finally, for early-career employees eager for international experience, a one-way transfer allows talent an international opportunity with minimal cost to the business.

In addition, other industry-specific factors have influenced the use of a one-way move: Certain company cultures and compensation schemes lend themselves well to this policy type. For example, at tech companies, international experience is coveted, and compensation reward often comes from long-term incentives. This means they don't need to offer expensive home-based balance sheet packages. In fact, since employees are receiving equity, a full balance sheet package under a traditional expat package isn't often perceived as valuable.

More Uses, Still One Approach

One-way moves were already being used in creative ways prior to the COVID-19 pandemic, and global mobility experts have continued to do so. Having used one-way transfers successfully in the past, companies are recognizing that the world has gotten "flatter." For mobility between countries with economic affinity and comparable standard of living, employees may be satisfied with a one-way transfer rather than a full assignment.

The pandemic presented mobility with another opportunity to use this policy type in a new way by addressing the rise of remote work requests. With the great resignation in 2021, employees became empowered to ask more from their employers and, in turn, employers needed to adapt to meet these challenges. Since employees have become used to working from home, requests to work remotely are more common than ever. While some organizations began developing remote work policies, many global mobility programs have found that one-way moves are the simplest way to accommodate these requests. Although one-way transfers typically do not include company support for relocation, mobility has seen that using a leaner one-way package allows their organization to retain talent at a low cost while allowing employees the flexibility they wish.



For many companies looking to save on high-cost items such as tax equalization or cost-of-living support, a one-way relocation allows companies to move their talent compliantly without guaranteeing any conservation of the employee's home standard of living.

Another example of a low-cost one-way relocation scenario is volunteer requests to work in another location. Many programs had already been using one-way transfers for talent looking to gain international experience, but more programs now feel more comfortable offering a limited-support one-way transfer package for employee-initiated moves. Consider an accompanying spouse or partner: Should an employee wish to remain with their organization while still moving with their spouse, a volunteer one-way package containing tax preparation services and immigration support allows the employee to work where they wish while maintaining their employment. Like remote work moves, this allows mobility to retain talent while supporting employee flexibility.

From employee-requested relocations to critical business requests for international talent movements, mobility wants to accommodate more move types to help deploy talent on a global scale. But more specifically, mobility wants to accommodate each move with the proper package. While many of the new ways to support one-way transfers make sense, such as for volunteer assignments or remote work requests, one-way transfers are not to

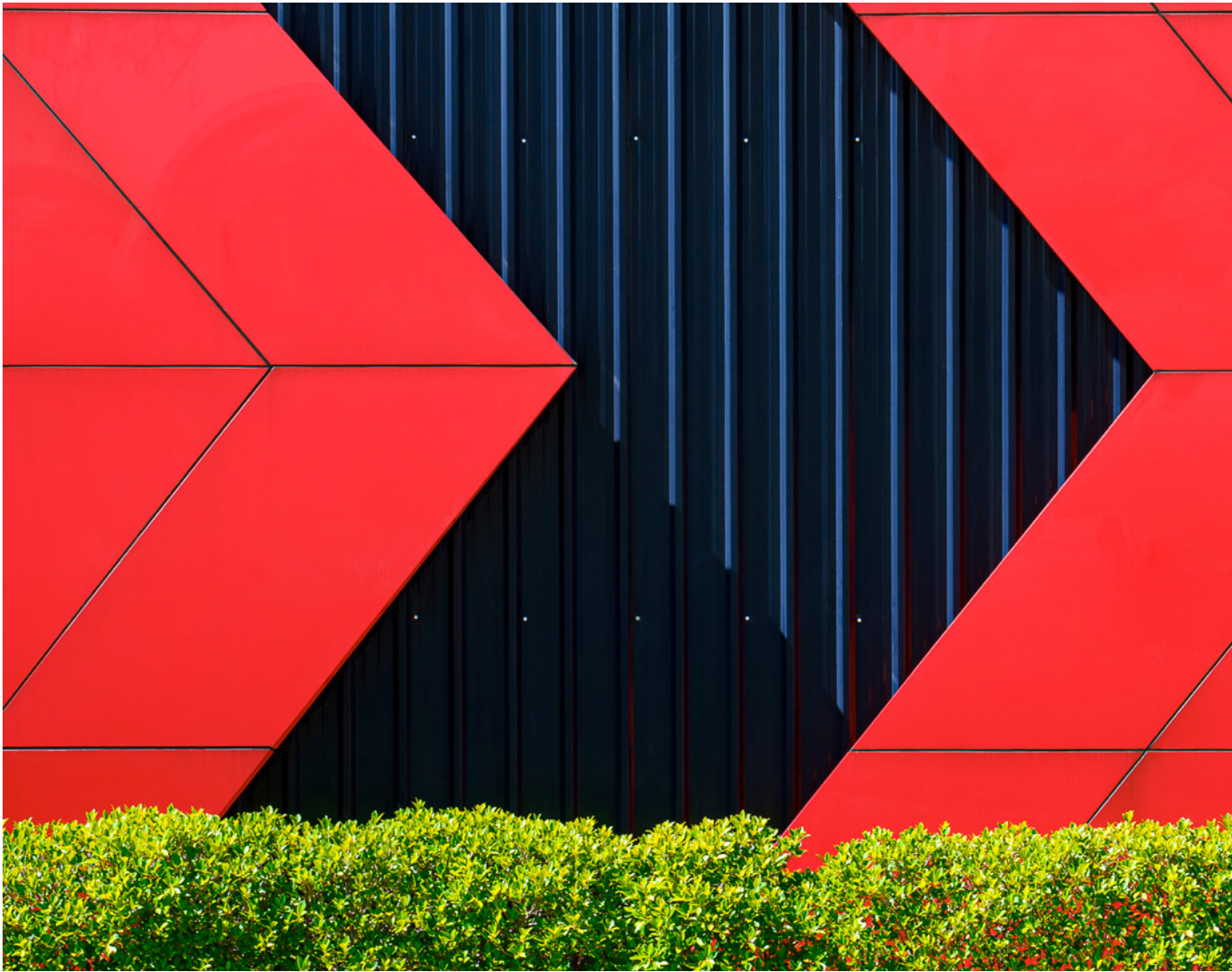
be used for all transfers. Part of being an adviser to the business means knowing when a policy should not be used, and there are many cases when an assignment is preferable to a one-way relocation.

Transferring With Caution

Mobility must be aware of several considerations when adopting a one-way move policy type, both from a philosophical and a process-oriented perspective. First, mobility must consider the talent philosophy of the business. Some organizations invest heavily in their talent through financial support, while other companies nurture their employees by giving opportunities to take on responsibility and gain skills overseas. Whatever the philosophy is, mobility needs to recognize the overall talent mission so that they can align their one-way move policy to the greater talent aims.

With the talent philosophy in mind, mobility must also examine the true intent of the move. One-way moves can be true permanent transfers, but they can also be indefinite moves. With indefinite moves, the employee may still be expected to be mobile. Regardless of the actual talent philosophy, mobility must share expectations on timing with talent. If employees are under the impression that they're permanently located to another country, only for the business to ask them to relocate again six years later, they may choose to leave the company due to the misrepresentation of their move.

In addition, the business must decide how they're protecting these employees: Are they being equalized to their home standard of living, or to that of the host? It is important to understand how the employee's standard of living is being protected, as mobility cannot sell the relocation to the employee until they recognize the philosophy behind the move. A one-way move implies that the employee will live like a local. But if the business wants to maintain the employee's tie to their home standard of living, then a home-based assignment is the better choice. Before promoting a one-way relocation, mobility must understand the actual aim behind the move so that they can advise against it if the motives don't align to the fundamentals of the move.



Process 101

Beyond philosophy, process is the other key factor to be aware of when adding a one-way move policy to a mobility toolkit. First, before considering one-way moves within an organization, mobility needs to ensure that there is a written policy document that clearly states who is eligible for the policy. Without clear policy documentation, programs can wind up creating one-off packages for each transfer, with no guardrails in place to ensure consistent and equitable application among employees. Further, without a well-defined section on eligibility, the business may start requesting one-way moves in inappropriate circumstances. Trying to support an employee on an international transfer, when they're truly doing a two-year expat assignment, is a challenge that no mobility professional wants to face. Mobility can prevent such frustrations by thoughtfully planning the policy document.

Another process aspect to consider is compensation. While one-way moves typically have the employee move onto local compensation, it's important to consider how the business will manage the change in transferring into the host scheme. If the structures are similar between home and host, mobility can use compensation data available to decide an adequate salary point for the employee to move onto.

However, if compensation is significantly different between origin and destination, mobility needs to work with total rewards to clearly define a process for how to decide local salary. For example, a one-way transfer from Mexico to Switzerland will result in a higher compensation for the employee, due to the employee moving from a lower-compensation and cost-of-living country to a higher-compensation and cost-of-living country. An employee will happily



relocate to the higher compensation structure; however, the scenario in reverse presents a challenge in that the employee is not likely to accept a large pay decrease.

Determining how to adjust compensation in a way that is equitable to the employee's local peers, while still being enticing to the employee, may be an impossible challenge. But if mobility can identify a process when employees are asked to relocate between countries with vastly different compensation affinities, they'll be ahead of the curve when these problems eventually arise. In these cases, an international assignment may be the better alternative.

An Adviser to the Business

As the facilitator of talent deployment, global mobility empowers organizations to move people with the right policy suite and recognizes both the

common and unique circumstances in determining appropriate policies. Being an adviser to the business involves deciding when best to use one policy approach over another. Mobility can share its knowledge of when to use international one-way transfers and the best way to solve a variety of mobility needs.

The pandemic revealed more cases when one-way relocations can facilitate moves compliantly and efficiently. And by solving new problems with existing tools, mobility has shown off its strategic muscle. In the years to come, we'll likely see mobility flex its policies in more creative ways. One thing is for sure: Mobility is prepared to continue being an adviser for years to come. *m*

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STRATEGIES FOR THE REMOTE-IFICATION OF WORK

A corporate mobility strategy that capitalizes on global remote work can create opportunities to attract new talent and spur company growth

By Christy Umstadter



As the world continues to work through the ups and downs of the COVID-19 pandemic, the coming years offer a new chapter in the globalization of talent. The paradigm of global remote work removes geographic barriers between employers and talent, and it presents both with unprecedented opportunities for growth, mobility, and connectivity.

This new dynamic also brings inevitable obstacles to overcome. However, businesses that adopt policies to capitalize on the growing global remote workforce will be positioned to attract

new sources of high-skilled talent distributed across the globe. Constructing a new corporate mobility strategy that incorporates employment, immigration, and tax compliance to address the “remote-ification” of work will be an excellent place for companies to start.

New Opportunities for Global Remote Talent

In 2022, the global infrastructure supporting remote work is better than ever. Recent innovations in communication technologies and business-to-business (B2B) and business-to-consumer (B2C) platforms offer companies and professionals the ability to conduct work operations efficiently from anywhere in

the world. Moreover, some U.S. cities and states are providing incentives to professionals who relocate to their communities to live and work, according to an August report on top remote work destinations by Envoy Global. Even world governments are capitalizing on a more mobile workforce, attracting digital nomads and other high-skilled professionals with remote work visas.

While the past two years of the COVID-19 pandemic have accelerated the widespread adoption of remote work, the trend began years ago with the buildup of the gig economy. Digital nomads, otherwise known as professionals working remotely in various industries throughout the globe, were some of the first to capitalize on early remote work opportunities.

Before the pandemic, digital nomads made up just a tiny percentage of the overall workforce. Now, many do not wish to return to the office full time despite efforts from governments and businesses to mitigate the risks of the pandemic.

According to a September 2021 Gallup poll, two-thirds of white-collar employees in the U.S. were already working remotely. The same poll found that 9 in 10 remote workers surveyed would like to continue remote work in the future. As such, companies will need to be open to these in-demand benefits for talented professionals who place a high value on mobility and flexibility.

In addition, remote work visas offer companies an alternative to the costs and resources associated with initiating traditional overseas assignments or permanent transfers to new countries. More than 20 countries worldwide now offer remote work visa programs, including Australia, Germany, Iceland, the United Arab Emirates, Mexico, the Bahamas, Hungary, Brazil, Costa Rica, Greece, the Czech Republic, and Croatia. The programs allow foreign professionals to apply for a temporary visa in these countries to live and work remotely. Governments implement these visas to encourage economic investment and expand business growth within their borders.

In comparison to applying for permanent residence or traditional employer-sponsored work visas, the application process for remote work visas is minimal and straightforward. The fees are also



generally much lower, and the employee rather than the company drives the application process.

More countries are considering creating remote work visa programs, indicating that the trend is here to stay. However, as companies explore these visas and remote work as part of their global mobility packages, a variety of potential obstacles can accompany the implementation of these new opportunities.

Identifying New Challenges for Businesses

Remote work has forced businesses to radically shift both major and minor functions. For example, human resources teams are facing new tax implications and payroll requirements for a dispersed workforce, and managers are overseeing teams and delegating work via videoconferencing tools such as Zoom and Slack.

Immigration is another major challenge. For example, many employment-based visas in the U.S. are location-specific. For businesses sponsoring foreign talent who hold employment-based visas and who want to work remotely, greater oversight



is now required to manage the mobility of these workers both in the U.S. and abroad.

Despite remote work taking root among many working professionals worldwide, most governments have been slow to update labor laws and regulations to meet this new reality. This has created regulatory gray areas for some businesses operating remotely. For example, in the U.S., the federal Department of Labor has strict adherence to maintaining Labor Condition Application (LCA) compliance as part of the H-1B specialty occupation work visa. The LCA certifies the wage requirements for foreign national employees working in a specific position for a defined geographical location in the U.S. Given the dispersal and mobility of remote workers, businesses are now left to navigate multiple filings of the H-1B petitions and LCA each time an employee decides to move from one geographic area to the next to ensure they remain compliant with H-1B requirements.

Meanwhile, other countries that typically try to attract international talent on a short-term

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Companies need to decide which locations employees are permitted to work from; that is key to developing a system that ensures continuity of work operations while avoiding security and compliance risks.

basis—such as Japan and New Zealand—have yet to formally adopt a remote work visa program.

European countries that offer remote work visa opportunities tend to maintain more efficient digital application processes and require less documentation than traditional work permits in those countries. Much of the application process for a remote work visa can be completed online and is less costly. That said, most countries still require an interview at a consulate, which can delay and complicate the application process, especially if additional pandemic-related regulations are in place.

In addition to immigration considerations, companies that hire digital nomads or allow employees to work overseas on remote work visas may encounter additional tax and payroll issues, data security and privacy concerns, issues involving the length of stay in one location, and reimbursement and salary considerations. Each area requires solutions derived from a concise and coherent mobility policy.

Making the Shift: A Holistic Mobility Policy for Global Remote Work

The business community is reacting accordingly to the trend of remote work, with companies establishing permanent remote work policies, according to a January report by CNN. A defined policy that allows for greater mobility for employees will

enable businesses to thrive and grow as acquiring talent becomes even more competitive.

While there is no one-size-fits-all policy that addresses the opportunities and challenges presented by the demand for global remote work, companies can incorporate the following key pillars as part of an effective and holistic global mobility policy.

The first step is to establish conditions and parameters for remote work offerings. Companies may offer employees the option to work entirely remotely or allow a hybrid model that requires work to be done in the office part of the time. In both scenarios, programs that maintain employment, tax, and payroll considerations must be instituted. Compliance with wage requirements and other immigration regulations should also be factored into the equation. More importantly, companies need to develop a system to manage remote workers to ensure accurate and up-to-date records of critical information such as work locations and employment terms.

Second, if a company hires candidates on remote work visas or encourages employees to seek them out, it should develop a policy to meet the needs of those employees in the locations where they would like to work. Companies need to decide which locations employees are permitted to work from; that is key to developing a system that ensures continuity of work operations while avoiding security and compliance risks. Salary adjustments, travel reimbursements, and duty-of-care policies should be considered in these locations as well. For example, a business may be comfortable allowing an employee to pursue a remote work visa in Germany or Mexico but may have concerns regarding other countries with limited access to communication infrastructure. Additionally, companies may consider durational limits for employees on remote work visas, as extended stays in those locations may impact long-term operations and raise additional immigration and tax liability.

Third, a company should set clear expectations for employees working remotely. No matter where they are working, remote staff are an extension of an organization, so they must be aware of any regional or national requirements as well as limitations that may apply to them or the business. To reduce risks associated with remote work

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To reduce risks associated with remote work programs, companies should work with legal counsel and use resources from global mobility services and technologies in order to be certain they address any relevant considerations in the remote work policy.

programs, companies should work with legal counsel and use resources from global mobility services and technologies in order to be certain they address any relevant considerations in the remote work policy. These resources should also be made available to remote employees to ensure better compliance practices.

Key Takeaways

The circumstances and goals of businesses vary greatly. While there is no one right answer for addressing ever-evolving remote work options around the world, companies should be flexible and proactive to access the expanding pool of global talent. Companies that want to stay competitive and develop progressive new policies around remote work should defer to their respective employment, immigration, and tax attorneys to capitalize on the boundless opportunities of remote work, which can attract and retain the best talent available across the globe. *m*

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CARE IN CRISIS

First COVID-19, then war—
companies are redefining today's
duty of care for overseas workers

By Robert Bittner

Beginning in late autumn 2019, employers' duty of care for their employees around the globe has been tested by a powerful one-two punch. First, the COVID-19 pandemic took more than 6 million lives worldwide, sickened hundreds of millions, and overwhelmed hospitals before it showed signs of waning. Then, in 2022, Russia's invasion of Ukraine led to millions of displaced, anxious workers, including expats employed by Western organizations.

It is one thing to prepare duty-of-care action plans in the event of a one-time natural disaster or for regions known for being high risk. It is another to fulfill duty of care amid a long-term pandemic or in a previously safe country suddenly thrust into war. While some companies may



be equipped to respond effectively to dangerous situations overseas on their own, many rely on global security-management companies such as International SOS, Global Guardian, and Crisis24. These organizations specialize in on-the-ground information and personnel safety and protection. Their expertise and insight can provide valuable perspective for redefining duty of care for today's uncertain world.

A World Disrupted

“The COVID-19 pandemic has been the biggest global disruption in most of our lifetimes so far,” says Global Guardian CEO and President Dale Buckner in a company news release. “It will certainly not be the last.” Even as companies continue to deal with the lingering impact of the pandemic, Buckner encourages leaders to be planning for the next disruption. And the next.

He recommends starting with a comprehensive review of duty-of-care policies and procedures. “Existing technologies, insurance plans, and providers should be carefully examined,” he says. “Where they have been found to fail, replace them. Corporations ought to be looking at ways to better entrench and scale up efficient systems with the goal of providing world-class duty of care—helping more people and other nations. This is critical for ensuring that the world does not shut down when the next disruption strikes.”

Although companies such as Global Guardian clearly have a vested interest in recommending third-party risk- and security-management partners, such recommendations should not be discounted out of hand. The alternative is to manage potentially complex overseas situations from afar, coordinating with a variety of U.S. government departments, gathering accurate information, and maintaining effective communication with in-country staff.

However, U.S. companies should not expect to rely on their government in the event of emergencies and threatening situations. For example, Buckner warns, “U.S. embassies lack the manpower, equipment, and training to help during a crisis.” If evacuations are needed, the State Department's own Bureau of Diplomatic Security

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The COVID-19 pandemic has been the biggest global disruption in most of our lifetimes so far ... It will certainly not be the last.”

—DALE BUCKNER, CEO AND PRESIDENT, GLOBAL GUARDIAN

states: “Organizations should not rely on U.S. government assistance in emergency evacuations and, when possible, should make independent and proactive evacuation plans.”

Whether companies are working independently or in partnership with security-management organizations, Buckner recommends that employers carefully evaluate their duty-of-care approach and then take appropriate steps to eliminate the weaknesses and strengthen the processes for the future:

- **Review insurance policies.** “When the pandemic hit, many HR directors were surprised to learn that their insurance policies did not cover a global health crisis,” Buckner says. “Companies should pay close attention to the fine print of their insurance policies to better understand policy coverage and restrictions.”
- **Review and assess the technologies relied upon during a crisis.** For example, Buckner asks, “Is a tracking app sufficient to keep your personnel safe in a foreign country on the other side of the world during a crisis? Oftentimes, the answer to that question is no.” Understand what technology is truly needed, its capabilities, and its limitations.
- **Make the necessary changes.** “All of us in corporate headquarters should take a hard

Setting a Standard for Care

"In terms of duty of care for mobile employees, one of the big things that has come about post-pandemic is the introduction of ISO 31030," says James Wood, head of security solutions for International SOS.

Introduced in September 2021 by the International Organization for Standardization, ISO 31030 helps in creating duty-of-care standards for those managing and participating in organizational travel.

"Managing risks for travel to a country where the organization has no local base requires more comprehensive controls than for locations where risk profiles are well known and treatments have already

been established," the document points out. "Travel risk management requires that organizations anticipate and assess the potential for events, develop treatments, and communicate anticipated risk exposures to their travelers. Advising and providing travelers with adequate medical and emergency response guidance, security, and information security precautions, including challenges to travel logistics, can significantly impact the outcome of disruptive events."

This new standard, Wood notes, "has driven a lot of organizations to review their policies and their processes, applying a consistent security, health, and well-being layer to business-related travel assignments."

look at our travel policies, platforms, and vendors," Buckner advises. "If any of these have failed—or underperformed—during recent crises, serious consideration should be given to making a change so companies can better provide duty of care."

War in Europe

As the global disruption of COVID-19 was just beginning to wane, Russia invaded Ukraine, sparking war in Eastern Europe. Fifty years ago, this might have been a mere headline in U.S. newspapers. In 2022, however, Ukraine and its neighboring countries are part of a global economy, home to branches and divisions of overseas companies employing staff from around the world. For these employers, duty of care took on new meaning as bombs fell, armored vehicles filled the streets, and large-scale evacuations began.

International SOS is a security-management company working around the world on behalf of its clients, who are often managing duty of care for expats and local nationals in areas far from company headquarters. The company is continually focused on monitoring escalation triggers globally, identifying signs of deterioration, and advising its clients accordingly, notes James Wood, head of security solutions for International SOS. Once war in Ukraine erupted, relocating clients' in-country personnel to safety became the top priority. "There were also ancillary considerations around business continuity," Wood says, "around the impact on the broader employee population who may be not leaving that location, and also around the logistics of that movement." (Because the war is ongoing and security-management companies must be hypervigilant on behalf of their clients, no one we spoke to for this article was at liberty



to provide identifying specifics or details regarding their actions in Ukraine.)

One of the key challenges was—and remains—communication. There are often disruptions to communications networks, including cellular and land-based telephones and the internet, making it difficult for companies to connect with their employees. In addition, organizations are having to conduct urgent, rapid risk assessments based on ever-changing information from the field that may or may not actually be true. “People can get a lot of disinformation,” Wood acknowledges.

International SOS’s experience and established network in the area is proving invaluable. “We leverage the power of our on-the-ground resources—where it has been safe to do so—get actual eyes on the situation, and use that accurate information to provide guidance to our clients,” Wood says.

Organizations have also been challenged by the logistics of evacuating or relocating their employees. “A request for assistance from a client may well be us moving employees from Point A to B,” says Wood. “That may be in-country, or it may be across a border, for example into Poland. The layer of complexity of providing medical assistance on top of that has presented some unique challenges. Ensuring you can provide that critical medical care—and that you can do so in a

live conflict zone—has been quite a challenge for us in Ukraine.”

Ironically, the business changes made in response to COVID-19 might actually have helped in terms of maintaining a degree of business continuity in the midst of employee relocation. “If there is a silver lining to COVID, it may be the fact that the pandemic got companies and their employees more acclimated to working from home,” says Mike Susong, senior vice president of global intelligence for Crisis24. “Because some essential systems and procedures were already in place for managing off-site workers, there was a lot less disruption when it came to moving workers in Ukraine to other cities or even to other countries. That was a positive thing as far as mobility and productivity were concerned.”

A New Mindset

For employers working to manage their expat employees on their own, Susong notes that the kind of preparation and problem-solving required by today’s challenges—particularly in Ukraine—requires a fresh mindset. “You have to think differently and explore scenarios the company has never conceived before,” he says. “This is not a flood, fire, or civil disturbance. Your company



Organizations that commit appropriate resources and take a clear-eyed view of what has happened ... are crystallizing functional business plans. ... Hope is not a very effective strategy.”

—MIKE SUSONG, SENIOR VICE PRESIDENT OF GLOBAL INTELLIGENCE, CRISIS24

may have a business presence in western Ukraine; tomorrow your office can be struck by a Russian cruise missile fired from a submarine in the Black Sea. Read that statement aloud in the boardroom and get a show of hands of who, from experience, knows what to do now. This is uncharted territory, even for sophisticated organizations.”

In addition, Susong suggests that today’s duty of care should be flexible enough to encompass the kind of intangible needs that have surfaced among expat employees in Ukraine.

“Typically, there is training for people who are going into a known high-risk area,” he says. “But until this past December, Odessa *wasn’t* a high-risk area. So, let’s say you’re in Odessa, it’s a sunny day at the beach, and the ice cream vendors are out. In those conditions it’s sometimes hard to make sure both the citizenry and the expats realize the precautions they need to take.

“They need to respond to air-raid sirens. They need to make sure they have that extra supply of water or medicine and are prepared to do the things you need to do in a high-risk situation. It requires a different way of thinking about daily life,” Susong says. “At the same time, we are all striving for a sense of normalcy.”

The desire, he notes, is to keep everyone safe and security-conscious while not adding unwarranted stress to what is already a terrible situation. “This conflict is not going to end in months,” he adds. “This is a highly lethal, kinetic war by every definition. The entire country of Ukraine remains at risk, and Eastern Europe is well within military striking distance.”

The Community Workplace

Both Susong and Wood suggest that COVID-19 and the war in Ukraine are changing the scope of what duty of care entails for companies—as well as what employees will expect from their employers.

“Prior to COVID, most of us worked in an office or maybe worked a day from home during the week,” Susong points out. “The pandemic changed that. Suddenly everyone who *could* be working from home *was* working from home. Whereas, before, a corporation had a duty of care for their employees on the work site, now suddenly the work site is everybody’s neighborhood. As a result, we have seen our conscientious clients trying to expand on duty of care. And they want us, as a geopolitical risk organization, to be more aware of what’s taking place at the neighborhood and community levels.”

Now that much of the world seems to have passed through the worst of the pandemic, Susong sees many organizations moving out of crisis mode and into what he calls “mid-term planning mode,” both for duty of care to team members and continuity of operations. “Organizations that commit appropriate resources and take a clear-eyed view of what has happened—and likely scenarios for the next six to 12 months—are crystallizing functional business plans. Conversely, companies are hoping things will magically sort themselves out. ... Well, hope is not a very efficient strategy.”

“The next disruption is around the corner,” Buckner says. “It is critical, therefore, that corporations adapt their mindset—and rethink how they provide duty of care—to this new reality.” *m*

Robert Bittner is a Michigan-based freelance journalist and author.

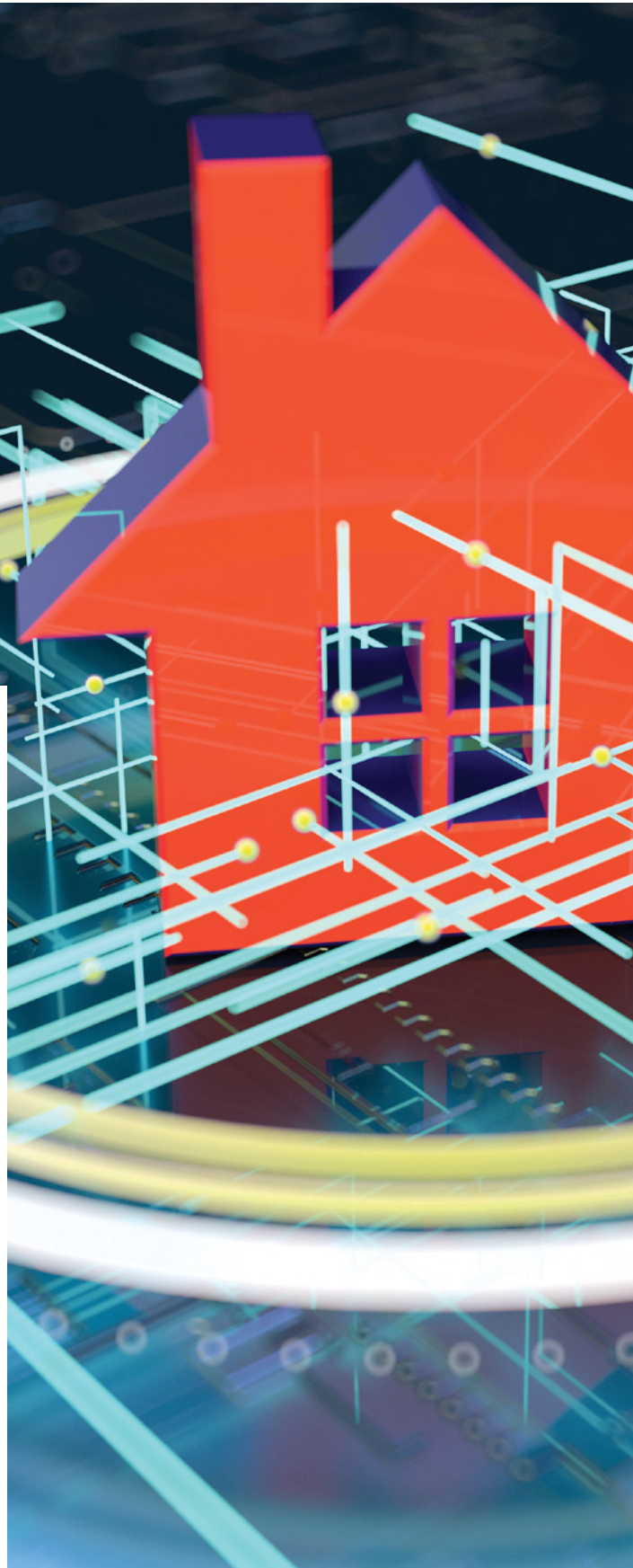
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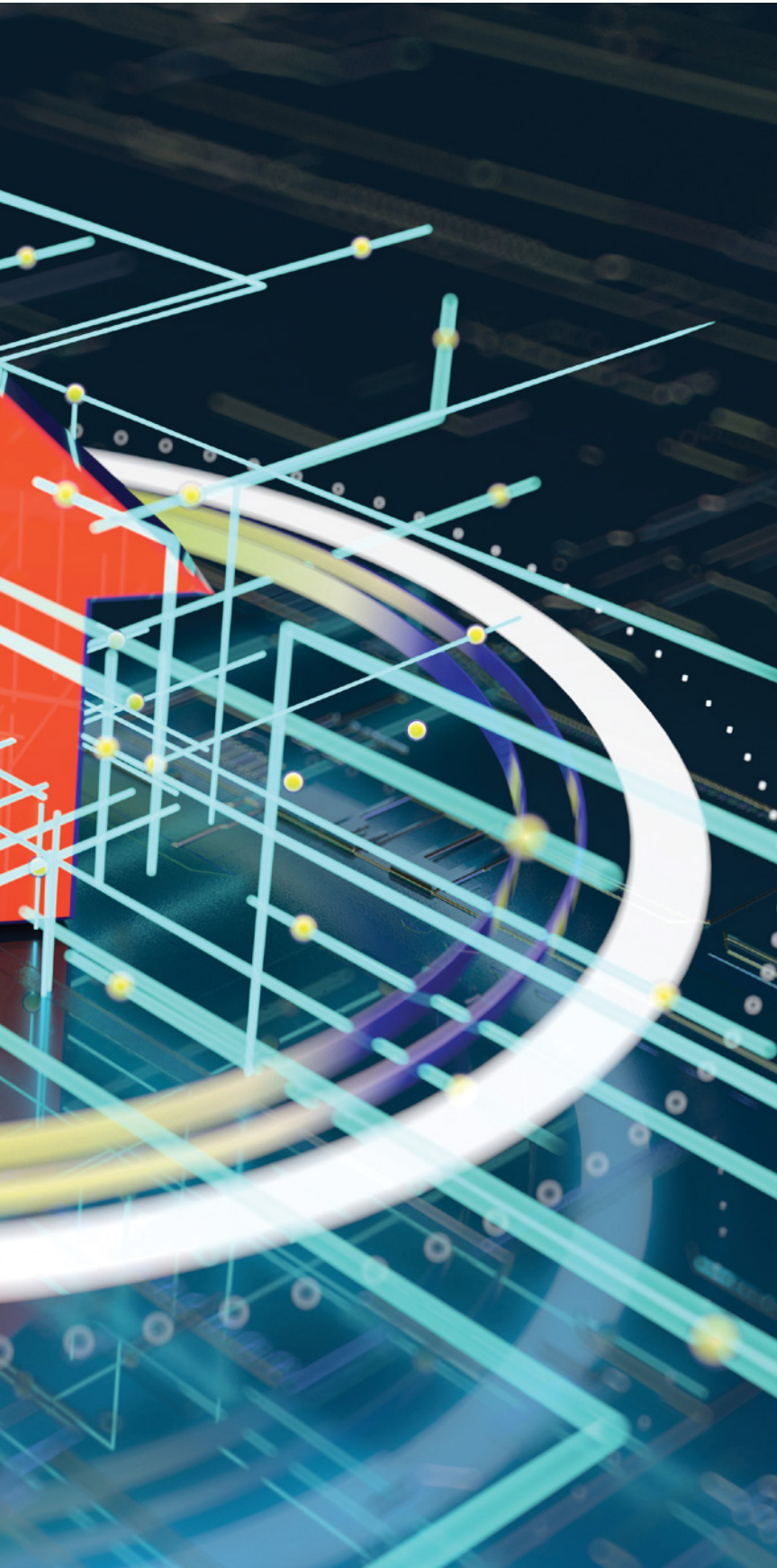
BY GABRIEL BROWN, CRP, GMS, VICE PRESIDENT,
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HATHAWAY HOMESERVICES AZ, CA & NV

Technology is always evolving. We've seen it catapult industries worldwide, but how much of a role has it played in real estate?

Looking back at the past 20 years, technology wasn't a main player. Many of us would describe real estate and the role of an agent as extremely personal and face to face; consider the relationship an agent made when they helped a family purchase their first home. When you help someone navigate what is likely their biggest financial investment, you definitely hold a sentimental value.

While building relationships is still hugely important in our industry, technology has given us new and broader opportunities to network, enhanced the processes and convenience of buying and selling a home, and added some much-needed security and protection to the transaction, all of which improve the client experience.





The COVID-19 pandemic helped drive some of these forward. While these technologies may have been developing in the background, we really got a chance to see the dramatic role they could play in our industry. Let's use videoconferencing or FaceTime as an example. Many of us relied on this technology to stay in touch with family and friends, but did we see this application ever being used to help REALTORS® list and show homes? Some have been applying this method for years prior to the pandemic, making creative videos to showcase properties, but not as the only possible medium for showing homes. We probably never would have predicted that.

Another medium that took on an increasing role during the pandemic was digital marketing and social media. Across the board, all social media platforms—such as TikTok, Facebook, Instagram, Twitter, and LinkedIn—reported a significant increase in the number of new users as well as the activity of existing users. Prior to the pandemic, in 2019, the average user spent 54 minutes on social media per day. Most recently, 2021 analytics show the average user spends more than 65 minutes on social media per day. What did this mean for real estate agents who needed to practice social distancing? Whether we wanted to or not, all of us needed to jump on the bandwagon and start becoming more active on social media, as it was going to be the only way we could stay connected with our current client base and prospect for new clients. For some business owners, REALTORS® included, this shift came with a moral question: Did you feel comfortable sharing some of your personal life with your business audience, or did you feel more comfortable keeping your business profile separate from your personal profile? Regardless of where you landed on that spectrum, users wanted to interact with you through one of these platforms, which meant you needed a presence on social media regardless. Compare this with a decade ago, when the typical means of connecting with new clients and prospects was through face-to-face meetings, open houses, networking events, or simply door-knocking.

Technology has also afforded some conveniences to the buyer and seller. How many of us have felt

the muscle cramps in our hand from writing our signature or initials on numerous documents in a purchase contract? Now, when was the last time you physically signed a document with a pen? Digital signatures are a method that was adopted in real estate and escrow services thanks to the development of technology in our industry. While certain securities and protective measures needed to be in place before we made that offering to the customer, “the security and protection of data has always been our mindset,” says Aaron Raffel, COO of Morreale Real Estate Services. “Our goal even prior to the pandemic has been to make it easier for the transferee to work with us and exchange documents and information.”

Morreale was one of the companies that quickly responded to the environment during the pandemic and equipped its support staff with webcams to be able to conduct virtual calls with their clients and customers.

The process of applying for a mortgage was another technology development that offered some conveniences and protection to the customer. Rocket Homes is a perfect example of a company that put its focus on customer experience by streamlining the mortgage application process. You can apply for a mortgage either online or over the phone and connect with a member of their team within a matter of minutes. It has also incorporated an option to connect with a network real estate agent who can quickly engage with the customer to help find a home. The pandemic caused a spike in the number of users who prefer to shop online, so providers of real estate services needed to act quickly to make sure they could accommodate that trend while still making it a personal experience.

Like the U.S. economy, real estate markets have trends and signals to help the everyday investor or consumer make the most informed decision. The expectation of being able to trust and rely on your real estate agent to understand and interpret what is happening in the local market has not changed. What has changed are the systems and technologies available to analyze and report the data. Companies such as Terradatum and Lone Wolf Technologies have provided advanced analytics and metrics, so real estate professionals

and multiple listing services can gain insight into their local real estate market. Having access to these types of tools allows real estate agents to stay informed and ahead of their competitors.

Another powerful reporting and data management platform that deserves its place in the real estate industry among relocation departments is eRelocation. Its comprehensive data management and reporting software provides a solution to integrate with third-party relocation companies, provides metrics for performance and conversion, and offers accountability for agents and relocation departments with one-click updates and tasks. These systems, among many others, have been very effective tools to help improve the real estate experience for the customer and client.

As we’ve said, real estate hasn’t always been a technology-forward industry. Honestly, you don’t get into real estate to sit behind a desk, send emails, and attend Zoom calls. It’s an industry built on being social and in front of people. The change that the pandemic brought to our industry was going to make or break the careers of many real estate professionals.

Many of us leveraged technology to continue to show homes and write contracts, assuming things would all go back to normal. Little did we know that the real estate market was going to take the biggest leap forward in prices and value. The introduction to remote work had many of us asking questions like: Do I like my new office? Do I need a bigger space? Or, can I live farther away from the office and get more for my money? Some homeowners made the decision to avoid any risk and not sell, which caused the all-too-familiar real estate equation (high demand + low inventory = increasing market). This created yet another challenge around how we educate a client and earn their trust to hire us.

As we approach a state of more normalcy with employees coming back to the office, businesses reopening, and consumers more willing to meet face to face, the culture of real estate is now more three-dimensional. It’s inevitable that we will experience more bumps along the road, but technology, if blended correctly with the social element, has shown it deserves to have its proper place to thrive in the real estate industry. *m*

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— Lynn Shotwell, President & CEO, Worldwide ERC®.

Spotlight

Costa Rica

BY GEOFF WILLIAMS

If you've ever been curious about what it would be like to live in a postcard, Costa Rica is your kind of place. With its sleepy coastal villages, wide beaches, and spectacular forests, the Central American country really has it all. No surprise, then, that it's ranked No. 1 on InterNations' *Expatriate Insider Survey* on the happiest places in the world for expats.

But there's more to Costa Rica than simply beautiful scenery.



Snapshots



Malta



Vietnam



Doing Business in Costa Rica

A corporate-minded country, Costa Rica exports more than 4,300 products to more than 150 nations around the globe. The country is known for its robust manufacturing sector, with medical equipment being one of its main exports. Major international corporations with more than 10,000 employees—such as Amazon, IBM, Intel, and Accenture—are also located in Costa Rica. In addition, the country actively encourages investment, with incentives such as its free trade zone setup, which provides tax and operational benefits for companies looking to do business there.

The World Bank calls Costa Rica a “global leader for its environmental policies and accomplishments.” For example, Costa Rica has pioneered a payments

for environmental services program that promoted forest and biodiversity conservation. As a result, Costa Rica is the only tropical country to have reversed deforestation.

Public transportation can be a challenge, as key infrastructure projects have been delayed or canceled due to the country’s slow and cumbersome bureaucracy. The country has four international airports, but most people fly in and out of the city of Liberia or San José.

The primary language spoken is Spanish, which has evolved to a kind of Central American Spanish. Business interactions are formal, and professional titles or *Señor/Señora* should be used. Be prepared with a firm handshake and a lot of business cards, preferably printed in English and Spanish.



Family and Living

Costa Rica has at least two dozen international schools. Most follow a curriculum from the U.S., the U.K., France, Canada, Australia, or New Zealand. Usually English, French, German, or Japanese is spoken as the primary language in these schools. Most international schools cater to children at the pre-kindergarten to 12th-grade levels.

Education is important to Costa Ricans and baked into the country's DNA. It has a very high literacy rate (97.86%), and when it started making primary school mandatory and free in 1869, it was one of the first countries in the world to do so.

When children aren't in school, you can explore white, sandy beaches, or sites such as Mistico Arenal Hanging Bridges Park. Visitors walk on hanging bridges over breathtakingly beautiful rainforests with a volcano in the background. Families may also want to visit the La Paz Waterfall Gardens, a nature park with five waterfalls.

Immigration and Permits

Generally, expats who work in Costa Rica will need an entry visa and a work permit. Costa Rica places great importance on its own residents finding work before allowing nationals from other countries to come over and work, which is one reason the process of applying for a work visa can be laborious. For instance, everything you submit must be translated into Spanish and requires a notarized stamp.

To obtain a work visa, expats first apply for a provisional visa and will need to offer up their fingerprints shortly after arriving. Applications are submitted through the Dirección General de Migración y Extranjería, which will process the forms and issue the visa. It's also important to note that applications aren't accepted on the last Friday of the month.





Unexpected Costa Rica

There is much to enjoy in Costa Rica, especially the wildlife. The country has four main monkey species: the howler monkey, the white-faced capuchin, the Central American squirrel monkey, and Geoffroy's spider monkey. Corcovado National Park is the only place in Costa Rica where all four monkeys live. Fifty types of hummingbirds also make their home in Costa Rica, although there are two kinds that are found only there: the coppery-headed emerald hummingbird and the mangrove hummingbird, which lives in the mangrove forests on the country's Pacific coast. With a full quarter of the country either protected land or a national park, Costa Rica is home to abundant wildlife, which also includes sea turtles, humpback whales, colorful scarlet macaws, toucans, and sloths.

Malta

Malta is the smallest European Union member state—three islands in the Mediterranean Sea. But don't let its size fool you. The country, especially the capital, Valletta, has an excellent reputation as a place in which to conduct business. It also comes in at No. 2 on InterNations' *Expatriate Insider Survey* of the happiest places in the world for expats.

From public transit to the internet, Malta's infrastructure is strong and reliable, as are the professional service providers that every business needs in areas such as auditing, accounting, payroll, employment law, compliance, and regulatory advice. Several industries thrive in Malta, notably tourism, financial services, remote gaming, and information and communication technology.

It's also a wonderful place to raise a family. Along with several international schools, the country is filled with interesting places for families to while away the hours, such as Wildlife Park Malta and Malta National Aquarium. Mellieħa Beach is a popular spot, where the water is shallow and warm and populated with fish. St. George's Bay is another excellent beach, where teenagers may want to paraglide, water-ski, or scuba dive. If there's a downside, housing is sometimes hard to find—and expensive. But that's because so many people want to live in Malta. Its islands enjoy 300 days of sunshine a year and some of the bluest seawater you've ever seen.



If you want something truly unusual, visit Popeye Village. It's the abandoned 1980 film set from the Robin Williams movie *Popeye*, which the locals promptly turned into a theme park.

Vietnam

Once one of the world's poorest countries, Vietnam now has a thriving middle class. It has also transformed itself into a paradise for expats, coming in at No. 8 on InterNations' *Expatriate Insider Survey* of the happiest places in the world for people working internationally.

The business climate is open and welcoming to foreign investment, and the country has some of the world's top factories, manufacturing electronics, smartphones, and clothing. Some of the fastest-growing industries are in e-commerce, fintech, and education technology. Put another way: In 2020, when the COVID-19 pandemic hit, Vietnam was the only country in Southeast Asia to see its economy grow at 2.9%.

Many prestigious international schools are available in Vietnam, especially in Hanoi and Ho Chi Minh City. For example, the European International School offers classes in English but also German, French, Spanish, Korean, Chinese, and Vietnamese.

The cost of living in Vietnam is low, and quality of life is high. There's so much to do, including the Vinpearl Safari,



the National Oceanographic Museum of Vietnam, and the Street Night Market, featuring nearly 4,000 shops and food options. But you'll definitely want to check out Hang Son Đổng, the world's largest cave. It's large enough to fit a skyscraper, and because part of the ceiling cave collapsed, enough light comes in that there is now a jungle in it.

Triumphing Talent Starts With Flexibility

COMPETING FOR TALENT? ARPIN'S AFFINITY PROGRAM CAN GIVE YOU THE EDGE YOU NEED.

BY KAREN BANNON, DIRECTOR OF MARKETING AND ESG, ARPIN INTERNATIONAL GROUP

In the Great Resignation era, companies are facing increased competition for talent. At the same time, prospective employees view their work expectations through a new lens. According to Harvard Business Review*, 88% of workers say that when searching for a new position, they will look for one that offers complete flexibility in their hours and location. Therefore, adding a moving benefit to your total rewards program is critical to attracting, recruiting, and retaining talent.

experience a single one. Thank you to you and your team for making that all possible! Best wishes."

Daniel K., FORTUNE 500 Pharmaceutical
"Today, I had a pack and pickup for international air freight, and the two-man crew that came was awesome. They were very prompt (right at 8 a.m., beginning of window), courteous, diligent, efficient, careful, and I felt they did an excellent job. I wanted to pass along because good customer service often goes unnoticed. They were great. Very pleased."



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*What Your Future Employees Want Most, Tim Minahan, Harvard Business Review.

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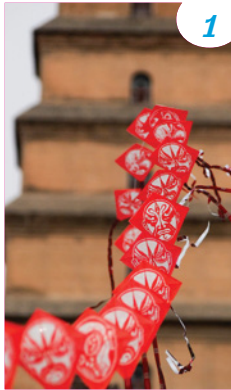


Mobility Matters

Interesting, challenging, and surprising stats and finds around the globe

BY JON FERGUSON

Every year, holidays offer a chance to celebrate and reflect. The world's diversity of cultures ensures that countries embrace holidays that are uniquely their own.



1

1 Kites dot the sky during the Chung Yeung Festival, a Chinese holiday celebrated on the ninth day of the ninth month of the Chinese lunar calendar, which fell on 4 October this year. Not only do the kites add color to the sky, but it is believed that they carry bad luck away from the earth. As well as flying kites, the Chinese celebrate the festival, also known as the Double Ninth or Autumn Remembrance, by climbing hills and visiting the graves of their ancestors, where they leave offerings. In 1989, the Chinese government designated the festival as Senior's Day, a time to celebrate the elderly. *Source: nationaltoday.com*

2 Also in October, more than 1 billion Hindus, most of whom are concentrated in India, will celebrate Diwali, a five-day festival that marks the triumph of good over evil. A key tradition of the holiday is the lighting of small earthen oil lamps that symbolize the inner light that wards off spiritual darkness. Activities during the five days include exchanging gifts with loved ones, cleaning house, and buying new furnishings. The date of the holiday is tied to the lunar calendar and changes from year to year. *Source: npr.org*



2



3

3 Fèt Gede, a Haitian holiday rooted in Vodou culture, is a day to celebrate the dead. Haitians celebrate the 2 November holiday, also known as the Festival of the Dead, by paying homage to the spirits of their ancestors at temples, churches, homes, and cemeteries. These are lively celebrations in which participants, mostly dressed in white, purple, and black, indulge in much drinking, feasting, and dancing. Fèt Gede celebrations can now be found in some U.S. communities, including New York City, that have large Haitian populations. *Source: visithaiti.com*

Source: visithaiti.com

4 Las Posadas, which is celebrated from 16–24 December in Mexico and other parts of Latin America, is a key part of the Christmas celebration. During the nine days, parties are held at the homes of different families. Before each gathering, the guests form a procession to pay homage to Mary and Joseph, whom the faithful believe searched for a place to stay on the night of the birth of Jesus. When they reach the home hosting the party that night, a special song is sung, with those outside singing the role of Joseph asking for shelter. Those inside sing the role of an innkeeper, who says there is no room. It goes back and forth until the innkeeper relents and lets them in, signaling the start of the celebration. *Source: learnreligions.com*



4



5

5 If you're traveling to Thailand on 13–15 April, pack a raincoat and umbrella, because odds are you're going to get wet. Those are the 2023 dates for the Songkran Water Festival, a holiday that used to be a celebration of the first day of the new year based on the solar calendar. The event engages children and adults alike as they stage massive water fights across the country. The holiday does have a serious history, as the casting of water on people symbolized cleansing and purification, washing off all the troubles experienced during the past year. *Source: renown-travel.com*

Source: renown-travel.com

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