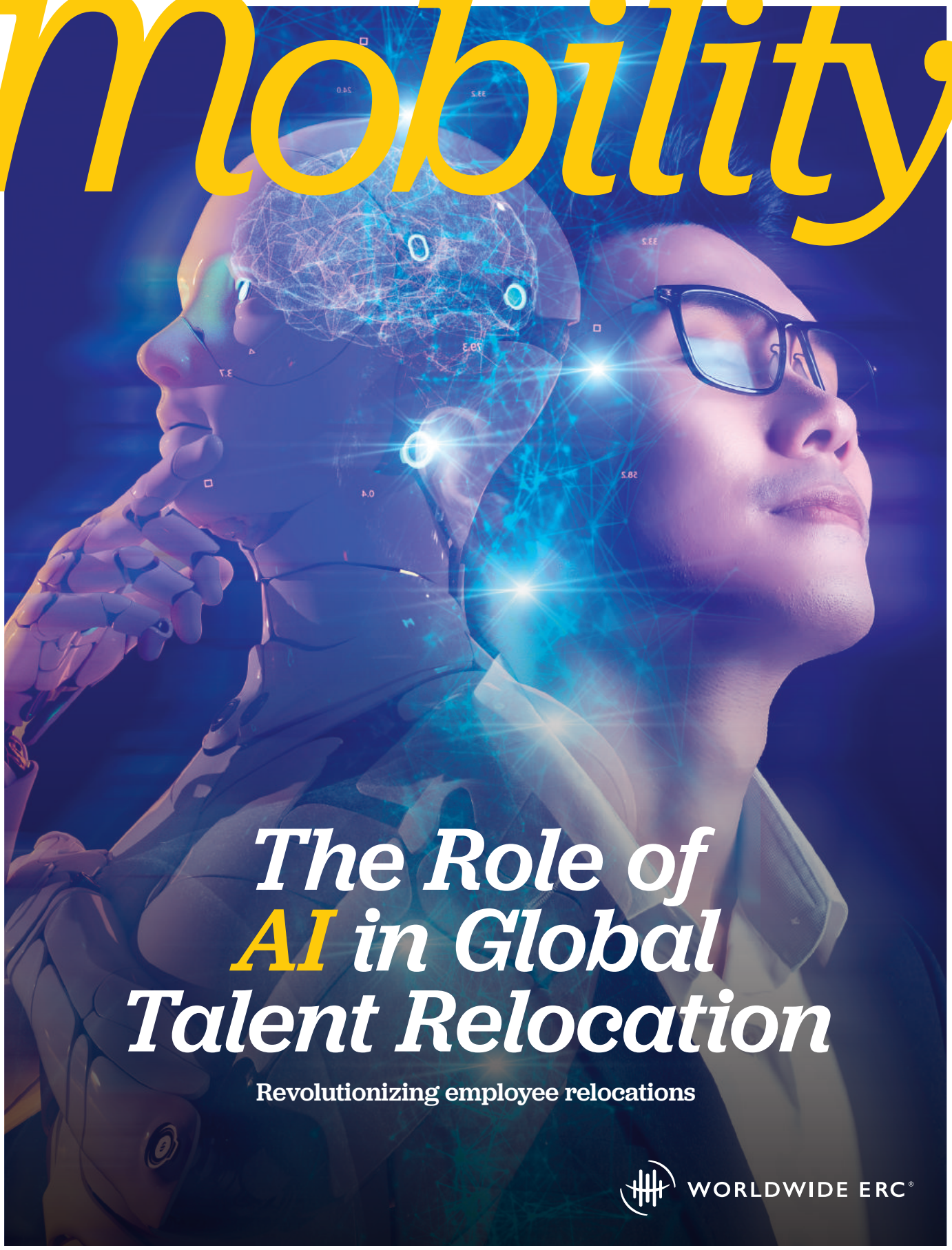
Issue 4 2023

Mobility™



The Role of AI in Global Talent Relocation

Revolutionizing employee relocations

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Making a Human Impact
INVEST IN DIGITAL STRATEGY AND TECHNOLOGY

AI and Data Privacy
HOW REGULATIONS ARE SHAPING THE LANDSCAPE

Analytics in Motion
GLOBAL MOBILITY CAN TRANSFORM THROUGH DATA

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The Aires Voice Assistant℠ (AVA) Amazon Alexa skill allows transferees to receive hands-free, up-to-date information regarding their most recent relocation without logging into another application. Transferees are able to get questions answered, email their Aires counselor, and learn how to do simple tasks using MobilityX®.

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- how can I update my tax information?

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AI's Role in Transforming Global Talent Relocation

BY ALEXA SCHLOSSER

Insights from Altair Global experts Jason Beaudreau, chief technology officer, and Susan Myers, senior vice president of global financial services.

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Making a Human Impact Through Technology Solutions

SPONSORED BY DELOITTE

Companies that embrace and invest in their digital strategy and technology solutions may be better able to evolve their talent mobilization programs to make lasting impacts.

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BY WALTER DANNEMILLER

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Analytics in Motion: How Having a Solid Grip on Data Can Transform Global Mobility

BY ANNI KERANEN

The data we hold has the potential to unlock invaluable insights that are reshaping the way we understand, manage, and optimize global mobility.

A World of Difference in Immigration

At Fragomen, we don't just facilitate immigration—we create opportunities. From individuals and small local businesses to the world's largest companies, we support all of your immigration needs, all over the world. We are internationally local—with offices in the heart of each region and services stretching around the world. No matter where you've come from, or where you're going next, Fragomen is here to propel you forward.

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Auckland, Calgary, and Vienna
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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

May 2024

Regional Summit
7 MAY
India

Regional Summit
14-15 MAY
Singapore

October 2024

Global Workforce Symposium
22-25 OCTOBER
National Harbor, near Washington, D.C.

All events can be found at *worldwideerc.org/events-conferences*.

Webinars

Navigating the Changing Landscape of Buyer Broker Compensation – Challenges for the Talent Mobility Industry

The recent jury verdict in the Sitzer/Burnett class action lawsuit has resulted in stakeholders across the real estate sector and connected industries, including talent mobility, reevaluating their processes and practices, and looking at changes related to buyer broker compensation. These changes will result in significant changes across the talent mobility industry, including, but not limited to, RMC commission practices, company policy requirements, and additional financial costs to be borne by transferring employees and/or their company.

This webinar brings together industry leaders to provide an overview of the Sitzer/Burnett decision and its impact, the growing landscape of additional litigation cases in process or being filed across the United States, and the potential ramifications of these cases on the talent mobility industry.

All webinars can be found at *worldwideerc.org/events-webinars*.

Read all about it!

ABOUT WHAT? THAT'S OUR QUESTION FOR YOU! SEND YOUR SUGGESTIONS FOR TOPICS YOU'D LIKE TO READ ABOUT IN *MOBILITY* TO **MOBILITY@WORLDWIDEERC.ORG.**

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Mobility (ISSN 0195-8194) is published quarterly by Worldwide ERC®, 2001 K Street NW, 3rd Floor North, Washington, DC 20006, United States, 1-703-842-3400. *Mobility* examines key issues affecting the global mobility workforce for the benefit of employers and firms or individuals providing specific services to relocated employees and their families. The opinions expressed in *Mobility* are those of the authors and do not necessarily reflect the opinions of Worldwide ERC®. *Mobility* is printed in the United States of America. Periodical postage paid at Washington, D.C., and additional mailing offices. Worldwide ERC® members receive one annual subscription with their membership dues. Subscriptions are available to both members and nonmembers at $48 each per year. ©2023 by Worldwide ERC®. All rights reserved. Neither all nor part of the contents published herein may be reproduced in any form without written permission from Worldwide ERC®.

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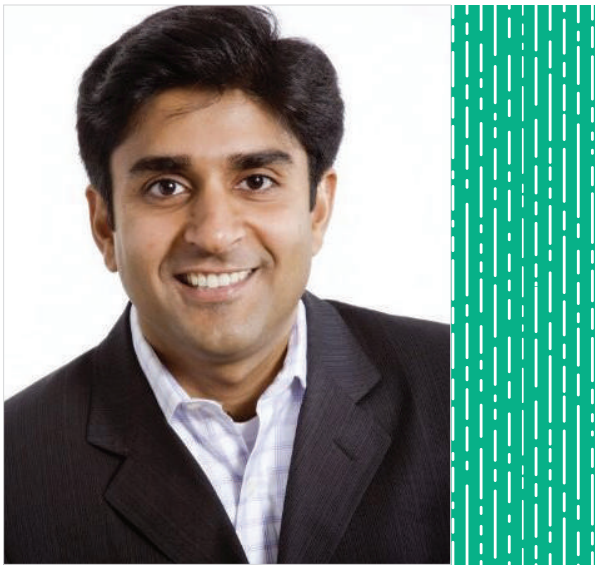
Modernizing Our Organization

At this year's Global Workforce Symposium in Boston, where you helped us exceed our highest expectations, we unveiled a significant change that marks a new chapter in our journey: our evolution from Worldwide ERC to WERC.

This transformation goes beyond mere rebranding; it embodies our unwavering commitment to growth, innovation, and unity within our vibrant community of talent mobility professionals. Our new brand encapsulates our focus on progress, leveraging vibrant colors and modern typography to reflect the collaboration and diversity that define us.



This change isn't solely about a new appearance; it signifies our dedication to you, our valued members and stakeholders. It's about fostering a profound sense of pride and belonging among us all. As we enter the new year, you'll witness our new look and feel being seamlessly integrated across our organization.

Our refreshed logo serves as a powerful symbol of our collective strength. We firmly believe that this image mirrors our commitment to every individual within our network.

As we embark on this transformative journey together, let's embrace this change as a testament to our shared dedication. Thank you for being an integral part of this evolution, and I eagerly anticipate the exciting opportunities that lie ahead for WERC.

And if I didn't see you at this year's GWS, I look forward to seeing you at one of our many live events around the world in 2024, including regional summits in India and Singapore in May, a regional summit in the LATAM region, and GWS 2024 at National Harbor near Washington, D.C., in October.

Have a great holiday season!

Anupam Singhal
Chair
WERC

> This transformation goes beyond mere rebranding; it embodies our unwavering commitment to growth, innovation, and unity within our vibrant community of talent mobility professionals.

Remote Work Blurs Boundaries

SPONSORED BY BAL

As remote work transcends geographic boundaries, today's more fluid, digitally connected workforce brings with it new opportunities—and new challenges—for HR/immigration managers to take into account and, where necessary, to solve.

REMOTE WORK IMMIGRATION CONSIDERATIONS

When you're are faced with an employee working remotely abroad, the first consideration should be whether the employee has a right to work in the country where they're located. If they have a right to work (usually a visa or a permit), then it's important to understand possible limitations or conditions of their right to work. Next, you'll need to consider the long-term ramifications and plan for the individual employee. Is this a permanent role and location? A temporary visit?

More broadly, however, there's a much larger corporate view that needs to be considered regarding policy and process. It's unlikely that a company has only one employee with a remote work question; this issue is most likely going to grow, and when it does, you'll need a strong policy and process in place.

THINK BEYOND IMMIGRATION RULES

Before you focus on the individual employee and their work authorization, you need to establish your company's policy. How will you build it? How will you operationalize it? How will you enforce it?

You'll need to make sure your policy follows best practices and good governance in general. You need to know where all your employees are working and residing from a program integrity standpoint, from a risk and compliance standpoint, and to ensure fair and consistent treatment across your workforce.

For more insights on immigration and remote work compliance, check out episodes 29 and 30 of the BAL Immigration Report in the Apple, Spotify, or Google podcast apps or at **BAL.com/news**.

BAL has extensive experience in handling remote work arrangements, from tracking remote employees and ensuring compliance to program and policy development and deployment.

Learn more at **BAL.com**.

Send your article ideas, letters, and feedback to **mobility@worldwideerc.org.**

YP Future Tech

This issue is focused on technology, so we asked members of the Young Professionals Task Force: **What technology/application do you wish existed within the mobility space? What would it do, and what problem would it solve?**

I wish there was an application used throughout the mobility industry that utilized best practices for issuing or responding to requests for proposals (RFPs). The application would assist in establishing clear criteria and objectives for all proposals. These criteria would be aligned to the project's goals, budget, and timeline and be communicated to all potential bidders. Bidders would be vetted by the application to confirm both capability and appropriate mobility experience to ensure only high-quality candidates participate. The application would ensure a structured and documented process for reviewing and ranking the proposals. The application also would assist with communication for all parties to help build trust and avoid misunderstandings. It would also assist in addressing questions and concerns during the process to ensure a smooth process. Lastly, the application would facilitate delivery of honest, constructive, and specific feedback to the bidders. This would help improve the quality of the proposals and allow for a positive and respectful experience for the bidders and stakeholders.

ERIC STINE
Vice President of Relocation Sales and Affinity, Guaranteed Rate

“I wish there was an application used throughout the mobility industry that utilized best practices for issuing or responding to requests for proposals (RFPs).

Highlighting 2 Hall of Leaders Inductees

The Hall of Leaders program recognizes industry leaders who have received four Distinguished Service Awards as part of Worldwide ERC®'s service recognition awards program. This year's inductees are Kathy Connelly, SCRP, GMS, chief operating officer at Berkshire Hathaway HomeServices Georgia Properties, and Nino Nelissen, SGMS-T, managing director of Executive Mobility Group. We caught up with them to discuss some of their professional accomplishments over the years.

WHAT HAVE BEEN YOUR MAJOR ACCOMPLISHMENTS/CONTRIBUTIONS TO WORLDWIDE ERC AND OUR MOBILITY BUSINESS COMMUNITY?

Kathy Connelly (KC): As an alternative use of technology designed for e-relay, I worked on a committee that was challenged with how to leverage this technology in a different way. After explaining the need for an electronic solution for the brokerage community, we pivoted to use the technology to offer the Worldwide ERC BMA electronic form subscription to the mobility community.

Kathy Connelly, SCRP, GMS

Nino Nelissen, SGMS-T

Although the form has been updated a couple of times, the subscription itself is still heavily utilized by brokers to assess property values used by relocation management companies and corporate clients.

I have also served on numerous committees and been a vocal advocate to offer education and awareness of issues throughout my career, often sharing that information as a speaker or panelist at conferences.

Nino Nelissen (NN): My roles in Worldwide ERC have given me the opportunity to bring a European/global voice to the forefront of the organization. In particular, my role in the Global Forum has given me this possibility, but also roles in, for example, the Editorial Board for *Mobility*, as well as taking part in the Public Policy Management Committee, have been important ways for me to be able to do so.

DESCRIBE HOW YOUR WORLDWIDE ERC MEMBERSHIP HAS PROVEN BENEFICIAL FROM BOTH A PROFESSIONAL AND PERSONAL PERSPECTIVE.

KC: One of my mentors recommended membership in WERC early in my career. Throughout my career, I have professionally benefited from the educational sessions and knowledge sharing of other members. As someone who consistently attends conferences and available sessions, I have used this knowledge for continual improvement and development of the services offered by our company to relocation management companies and corporate clients. Personally, through networking and engaging with members from all verticals, I have made lifelong and cherished friendships that will go beyond my career.

NN: This business is all about people and making the right connections. I very much enjoyed attending Worldwide ERC events around the globe, meeting people and strengthening ties with like-minded professionals. I feel that being part of Worldwide ERC has given me the tools to excel as a professional.

WHAT IS YOUR FAVORITE OR MOST SPECIAL WORLDWIDE ERC MEMORY?

KC: As a member since 1994, there have been so many memories made that it's hard to limit it to one instance. Generally, I have very fond memories of numerous esteemed speakers, including Colin Powell and Barbara Bush. Both were amazing speakers, but I also remember me

Nino Nelissen (far left) and **Kathy Connelly (below left)** receive their awards from Worldwide ERC Chair Anupam Singhal.

and my fellow roommates of a presidential suite being asked to vacate early to accommodate a special hotel guest. Of course, we were all happy to accommodate our speaker, Barbara Bush!

NN: Perhaps attending my first U.S. national conference in Orlando, way back. (I believe it was in 2006.) I never saw so many mobility professionals together in one room.

WHAT SPECIAL MESSAGE WOULD YOU LIKE TO SEND TO OR SHARE WITH THE WORLDWIDE ERC MEMBERSHIP?

KC: It's really all about the very special people in this industry. WERC conferences serve as an invaluable platform for networking and personally meeting other members of the industry. I have had the good fortune of meeting many iconic industry leaders who have been a wealth of knowledge and most willing to share. The industry itself seems to attach caring and sharing individuals who are focused on paying it forward. I have made endearing friendships and shared laughter, tears, and many learning moments with other members throughout the years. I have had my eyes opened and experienced many "a-ha" moments that have allowed me opportunities I may otherwise have never had. As an industry, we have endured many challenges over the years and not only survived but thrived. My wish is that the organization and industry continue to attract and include solution-oriented people who embrace collaboration, education, and sharing for the greater benefit of its members.

NN: The importance of collaboration. Mobility is a larger jigsaw puzzle, whereby you hold certain pieces of the puzzle but never all of them. You need to work together with your partners who hold the other pieces to make sure you get the picture to fit. *m*

How Digital Innovations Are Transforming Immigration Systems Worldwide

Moving immigration into the digital age has been a major theme for governments around the world for more than a decade. As competition for talented migrants to fill critical skills gaps intensifies, the pace of change increases.

The benefits of digitization are manifold.

Digitized, streamlined, and automated processes can significantly simplify and expedite the migration experience while also reducing costs and decreasing the risk of manual user error.

Modernizing manual immigration systems enables interoperability across multiple agencies, which drives greater enforcement and compliance initiatives. Authorities benefit from increased data sharing and communications that enable efficient management of migration flows, inspections, and border security.

However, while the advance of technology has no reverse gear, this does not mean that the digitization of immigration is without challenges.

Not least is that the ability to digitize—and the ability for users to access the new technologies—can vary dramatically from country to country, meaning that while the direction of travel is consistent, the speed of change is not.

Automation also comes with myriad data privacy and data protection issues.

GLOBAL INSIGHTS

It is interesting to look at the different ways that governments are both using technologies and navigating those hurdles.

The U.S. Citizenship and Immigration Services (USCIS) has gradually added electronic filing options for some of its commonly used forms. However, most employment-based petitions remain paper-based. The Department of Labor (DOL) has long used online filing systems for its immigration-related applications. This has benefited both employers and the agency.

Australia has been progressively moving to an online application system for the past decade for all visa applications.

The U.K. government has been particularly active; examples include the digital delivery of its post-Brexit EU Settlement Scheme and the ongoing transformation of its Sponsorship Management System to streamline the end-to-end sponsorship process, making it easier for users to navigate and further reduce the time to bring a migrant to the U.K.

More than half of the EU member states offer digital services, such as online applications and tracking case progress remotely.

Qatar, Saudi Arabia, and the United Arab Emirates (UAE) set technological innovation as a key public policy agenda item for the enhancement of their immigration systems. Their focus on efficiency has led to the greater integration of systems and the ability to automate many transactions.

More recent advances include those brought in by Hong Kong, where electronic services have been extended to all visa application types. Applicants can complete the entire visa application process online.

In New Zealand, the government recently expanded online submissions of applications to the Skilled Migrant Category.

Several countries have introduced electronic travel authorization and entry/exit systems—with more on the horizon.

Since February 2022, Immigration Refugees & Citizenship officers in Canada have been granted access to the Canada Border Services Agency's Exit/Entry Information System. Within minutes, they can verify a foreign national's residency in Canada, entry documentation, and overstay history.

In autumn 2022, the government of Mexico launched an electronic Multiple Immigration Form (FMM) for foreign nationals entering for short-term visits.

From August 2023, Vietnam implemented a new visa policy to issue electronic visas (e-visas) to citizens of all countries and territories around the world.

ETIAS, ESS, AND ETA

Looking ahead, the EU has two significant launches planned to be implemented by 2024. The European Travel Information and Authorization System (ETIAS) is an electronic travel authorization system that will keep track of non-visa-required nationals entering Bulgaria, Cyprus, Romania, and the Schengen area for short-term visits.

> The benefits of digitization are manifold. Digitized, streamlined, and automated processes can significantly simplify and expedite the migration experience while also reducing costs and decreasing the risk of manual user error.

The ETIAS system is designed to work in tandem with the entry/exit system and will tighten security. It will be an automated IT system registering short-stay visa holders and visa-exempt travelers each time they enter and exit an EU external border, replacing the current system of passport stamping.

Similar to the ETIAS system, the U.K. plans to launch its own Electronic Travel Authorization (ETA) system later this year. The ETA is designed to keep track of non-visa-required nationals seeking to visit or transit through the U.K. for less than six months.

ON THE HORIZON

The adoption of artificial intelligence (AI) in immigration processes—though relatively limited at present—is already proving transformative, offering unprecedented efficiency and precision in tasks traditionally managed by human operators. AI is poised to fundamentally change the way immigration systems operate.

However, AI comes with its own unique set of challenges. Systems using AI must be designed

to ensure the accuracy of information, prevent biases, maintain transparency in the processes, protect data privacy, and uphold accountability for errors. Responsible AI requires experienced governance with a sharp focus on risk and compliance considerations.

Either way, digital transformation is sure to continue, and we are likely to see:

- More mobile-friendly apps
- More regional cooperation in efforts to standardize entry processes, digital identity programs, and application systems.
- The use of blockchain technology to revolutionize immigration and global mobility. (It will potentially add efficiencies to the process and reduce fraud by validating identity and eligibility checks. It can also be an important tool for digital proof of identity relevant to many types of personal data, including citizenship, health, birth, and education).
- Greater focus on sharing data across government departments, linking immigration, tax, and labor to address labor and skills shortages
- Use of AI and advanced data analytics to enable immigration systems to understand skills critical to support economic growth at any point in time and be more agile, enabling policymakers to adjust and promote new immigration pathways as shortages arise

With responsible governance, it will be exciting to see where the progress of digital transformation will lead us. *m*

Ann Truett is a partner at Fragomen and vice chair of the Worldwide ERC Immigration Forum. **Jurga McCluskey** is a partner and head of immigration Europe at Deloitte LLP and past chair of the Worldwide ERC Immigration Forum. **Azmina Aboobaker** is the director of U.S. and global immigration at Meta and chair of the Worldwide ERC Immigration Forum.

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Visit worldwideerc.org/gms-detail for more information!

The Numbers

The Brazilian Mobility Workforce

Along with Global Line, a consulting company situated in São Paulo, Brazil, Worldwide ERC®'s Mobility Brazil recently published data regarding the status of international mobility in Brazil. While a few trends persist from the previous survey conducted in 2020, the professional landscape has undergone a significant transformation.

For the full study, visit *worldwideerc.org/research_/research-library.*

Demographics

32%

of survey respondents were companies based in Brazil.

130

multinational companies of various sizes were surveyed.

30%

had up to 1,000 employees

49%

of companies had 1,000-10,000 employees

21%

had over 1,000 employees.

Remote Work Stats

75%

of the responding companies reported that they are using a hybrid schedule of on-site and remote work.

20%

of companies report exclusively being on-site.

5%

work entirely remotely.

47%

of professionals reported feeling more satisfied with their jobs due to flexible work hours and said that remote work is advantageous for work-life balance.

The Effect on Mobility Programs

55%

of companies said increased remote work has coincided with changes in mobility programs.

32%

of companies reported that the number of people transferred has decreased.

4%

reported that their number of transferred professionals has increased.

Brazilian Mobility Program Trends

Most popular mobility programs, ranked:

1. Localized professionals
2. Long-term transfers
3. Short-term transfers

65%

of companies prefer their wages paid to be comparable to the country of origin for short-term assignments.

33%

of companies prefer their wages paid to be comparable to the country of origin for long-term assignments.

32%

of companies preferred to look at host-country wages.

27%

looked at a combination of home-country and host-country wages.

AI'S ROLE IN *TRANSFORMING* GLOBAL TALENT RELOCATION

Insights from Altair Global experts Jason Beaudreau, chief technology officer, and Susan Myers, senior vice president of global financial services.

By Alexa Schlosser

The global talent relocation industry is experiencing a significant transformation, thanks to the integration of artificial intelligence (AI). AI is revolutionizing the way companies manage employee relocations, offering innovative solutions to streamline processes, enhance efficiency, and provide a personalized experience for relocating employees.

We spoke with two industry experts, Jason Beaudreau, chief technology officer, and Susan Myers, senior vice president of global financial services, both from relocation management company Altair Global, to gain insights into the potential applications, challenges, and ethical considerations surrounding the use of AI in talent relocation.

AI as an Assistant

Beaudreau emphasizes the role of AI as an assistant in the talent relocation industry. He envisions AI-based tools that help relocating employees optimize their relocation experience by ensuring they leverage their relocation benefits fully and simplifying the complex steps involved in the relocation process. This approach aims to enhance the employee's journey by providing real-time guidance and support.

Streamlining the Relocation Process

Myers highlights the potential of AI in streamlining the entire employee relocation process.

"We hear about the need to drive a seamless people experience as a high-touch service that replicates the culture of the client as they transfer or onboard new talent, while still being efficient with the relocating employee's time," she says.

AI can provide accurate and personalized information to relocating employees, allowing them to navigate their move efficiently. For instance, AI-powered chat technology can offer benefits overviews for self-service-minded employees, while those seeking human interaction can access relocation professionals. This blend of AI and human interaction ensures a customized and enhanced customer experience.

"Altair has been using AI and machine learning in global financial services for quite some time as we efficiently process supplier invoices and expense reimbursements," Myers says. "We have not eliminated the human aspect of expense auditing, but rather allowed the technology to handle the administrative work while focusing our team on the intricacies of coding for taxability, core/flex, Federal Acquisition Regulation (FAR), client-specific contract requirements, and more."

Addressing Key Challenges

The talent relocation industry faces challenges related to information availability, ROI measurement, and business process automation. AI can address these challenges by providing timely and accurate information to relocating employees, offering insights from integrated data sources for better decision-making and automating repetitive tasks to improve efficiency.

"Generative AI is going to give us significant power in leveraging data as we bring a variety of HR, operational, and mobility data together to understand trends and provide expanded analytics to power decision-making across many stakeholders," Myers says.

AI-powered chat technology can offer benefits overviews for self-service-minded employees, while those seeking human interaction can access relocation professionals.

Concerns About Implementing AI

Beaudreau emphasizes that while AI can boost performance, it should not replace fundamental aspects of the industry, such as data integrity, change management processes, financial management, and human interaction.

"I see AI as any other technical advancement," he says. "The fundamentals that make companies successful will still be required."

Myers adds that a measured approach to implementing AI is crucial to ensure that it enhances jobs rather than displacing workers.

"I'm very excited about the opportunity to integrate AI into the framework of solutions we bring to the global mobility space," she says, "but I do hesitate to jump into a new technology simply because it's garnering so much attention. Where the custody and care of people, their family, and their life's belongings are our main responsibility, taking a measured approach is essential. My hope is that AI is used to enhance jobs versus simply displacing workers as part of a drive for cost savings. Most jobs in mobility are made up of many tasks. The challenge is to expand roles and make jobs more rewarding while allowing AI to drive productivity."

She also raises concerns about AI potentially increasing bias in information and highlights the importance of balancing automation with personalization.

"Inherent in our industry is a vast awareness of the diversity of a global workforce. Cultural, economic, and social differences within our customer base raise the likelihood that application of AI will increase bias in the information generated through these tools," she says. "Building models that account for our differences while

still providing value will be a challenge that AI companies must tackle."

Data Privacy and Security

Both experts stress the importance of data privacy and security when handling sensitive employee information during the relocation process. They suggest that AI solutions should not require personal identifiable information (PII) to operate effectively. Human oversight remains essential to ensure the responsible use of AI and to avoid privacy breaches.

"PII is needed to perform relocation; however, it is not needed to communicate processes a relocating employee should follow or to understand policies and benefits at a deeper level," Beaudreau says.

Examples of AI Success

While AI adoption in the talent relocation industry is in its early stages, there are examples of AI-driven tools being used for expense management, virtual assistants, and destination content delivery.

"We've watched as several technology companies tout their solutions that use a variety of automation tools in expense management and virtual assistants," Myers says. "There are also a few examples where we have seen destination service providers begin to leverage AI for destination content delivery. We've also seen AI integrated into reporting analytics focused on the projection of costs through various estimating tools."

Myers ultimately believes generative AI holds the potential to disrupt how relocation management is approached in the future. "It will take some time to understand what is truly possible given the risk of AI-powered decision-making, but I expect we'll see a mobility solution ready to disrupt how we approach relocation management in the near future," she says.

Cost-Effectiveness

AI is expected to drive cost-effectiveness by increasing productivity in day-to-day tasks. However, the customization and flexibility required in the industry may limit the extent

of cost savings, as some tasks necessitate human involvement.

"My hope is we see AI as a tool that enhances our ability to provide value," Myers says. "There is always a concern that AI use is relied upon where humans should be engaged. There will most certainly be cost wins if mobility teams are willing to build streamlined solutions. These programs will benefit the most from AI. At Altair, we embrace that every client and relocating employee has unique requirements. That customization and flexibility required in our industry will likely put pressure on just how much cost savings can be driven out of the delivery framework."

> There are also a few examples where we have seen destination service providers begin to leverage AI for destination content delivery. We've also seen AI integrated into reporting analytics focused on the projection of costs through various estimating tools.

Ethical Considerations

Ethical considerations in AI implementation include data accuracy, bias prevention, transparency, informed consent, and oversight. Building a governance oversight committee and establishing an ethics-based charter are essential steps in proactively managing ethical risks associated with AI.

"Providing transparency and informed consent is needed to ensure individuals understand how their personal data will be used within the AI solution," Myers says.

Beaudreau emphasizes that his company "will not use AI to make decisions that impact people. Such decisions will always be made by humans at Altair."

Myers adds: "The entire area of ethics governance will likely become a robust industry as AI becomes more deeply integrated into our service structure."

Legal and Regulatory Challenges

The global nature of the talent relocation industry presents unique legal and regulatory challenges. Countries in the EU are already proposing AI regulations, and compliance on a global basis will be a significant challenge for relocation management companies (RMCs).

"With so many opportunities to provide virtual training, location-specific information, expanded virtual tours, and more, much like with privacy regulations, the RMC will need a clear path and framework that ensures compliance on a global basis—quite the challenge," Myers says.

The Evolution Continues

AI has the potential to shift the talent relocation industry, offering numerous benefits in terms of efficiency, personalization, and cost-effectiveness. However, industry leaders must navigate challenges related to ethics, data privacy, and compliance with evolving AI regulations. As AI continues to evolve, its successful integration into the talent relocation industry will depend on a balanced approach that combines technology with the human touch to meet the diverse needs of relocating employees worldwide. *m*

Alexa Schlosser is a senior content manager for Worldwide ERC®'s publications.

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MAKING A HUMAN IMPACT THROUGH TECHNOLOGY SOLUTIONS

Companies that embrace and invest in their digital strategy and technology solutions may be better able to evolve their talent mobilization programs to make lasting impacts.

BY CHLOE YATES, TYLER LINK, AND CERISSA HAYOT
SPONSORED BY DELOITTE

Global talent mobilization typically requires a multitude of external and internal stakeholders to achieve the desired human experience, business value, and compliance goals. With advancing technology, the changing workforce landscape, and an increased focus on compliance and risk, global talent mobilization professionals and human resource leaders have an opportunity to reassess and reimagine the global mobility ecosystem to humanize and digitize in new and innovative ways.

Technology advancements and evolving talent models are expanding and extending the way we work beyond traditional definitions. Companies that embrace and invest in their digital strategy and technology solutions may be better able to evolve their talent mobilization programs to support their overall organizational objectives and make lasting, positive human impacts.

Increasing Complexity of Talent Mobilization

The evolving dynamics of the global workforce have been heavily influenced by rapid technological advancements and interconnectedness, which continually are transforming the nature of work. Traditional methods of acquiring and deploying talent are evolving, giving rise to a more fluid and borderless global talent market. This evolution necessitates a deep understanding and proactive approach toward global talent mobilization.

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EVOLVING ORGANIZATIONAL CHALLENGES AND DEMANDS

- Ability to effectively manage program expansions and diverse move profiles (e.g., remote work, business travelers, commuters, gig workers, etc.) while meeting compliance and employee experience expectations.
- Doing more with less—expectation of talent mobility to elevate strategic value to businesses while achieving compliance, meeting talent goals, and prioritizing cost savings.
- Driving efficiencies and automation while creating a seamless, consumer-grade experience.
- Ensuring data can be shared, integrated, analyzed, and easily accessed and reported.
- Evaluating, investing in, and optimizing technology solutions during a time when change and innovation are rapidly evolving.

Enabling Talent Mobilization With Technology

To manage this increasing complexity, organizations have an opportunity to reimagine the use of technology solutions and make strategic technology choices that solve for diverse fact patterns.

TECHNOLOGY SOLUTIONS ENABLE WORKFORCE OPTIMIZATION

Advancements in technologies such as generative artificial intelligence (AI), machine learning, and predicative analytics are creating a wide array of opportunities to optimize talent and skills matching, process automation, and self-service tools while enhancing the user experience as well as gaining valuable insights for strategic decision-making and talent deployment models.

- Organizations can make better data-driven decisions to mitigate risk, reduce time spent, and focus on higher value-add strategic objectives.
- Talent partners can have the infrastructure and processes in place to support broader talent initiatives/strategy and develop workforce skill sets to meet organizational demands.
- Global talent mobility professionals can be empowered to do their jobs faster and more efficiently, providing employees with a better experience.
- Business partners can be empowered to make informed, strategic talent deployment decisions.
- Talent mobilization employees can have a consumer grade experience that is simplified, seamless, and intuitive.
- Curated ecosystems with integrated technology solutions can promote global simplicity, efficiency, and automation, which enables workforce agility and optimization.

Transforming the Digital Experience

Digital transformation requires a blend of technical and human capabilities and the integration of smart technology investments into various areas of an organization. An effort to transform the digital experience must consider how the organization, processes, and people can be changed through digital technologies. The digital journey is ongoing and requires long-term efforts focused on molding an organization by continuously surveying, evaluating, and deploying technology to create and drive value.

DERIVING VALUE

With advancements in artificial intelligence and an increased emphasis on talent and global workforce mobilization, organizations should ensure they are

The Digital Trifecta

- **Digital Strategy –** Define goals and a plan outlining how an organization uses technology to accomplish its goals.
- **Technology Aligned to Strategy –** Align and implement technology solutions to bring the strategy to life.
- **Digital Change Management –** Mobilize the organization and prepare to manage and receive the technology.

meeting their objectives by developing a clearly defined digital strategy in which specific technology investments are aligned and the organization is mobilized and ready to manage the change (Digital Trifecta). Digital strategy, technology solutions, and change management should be mutually enabling and reinforcing.

Digital Strategy

Intelligentially designed technology solutions can facilitate a desired experience and ensure execution of an organization's digital strategy. An effective and successful digital transformation is built on a foundation of a smart digital strategy.

COMPONENTS

- Strategic possibilities created by digital transformation.
- Terms that describe efforts to enable a larger strategy.
- Digital capabilities, new markets, and new products.

Technology Aligned to Strategy

To bring digital strategy to life, an organization should be intentional in their technology approach and make technology investments that are purposefully harnessed to achieve a distinct goal. To enhance growth, profit, and value, organizations should make wise investment choices when designing technology solutions and ensure those solutions are implemented with discipline.

COMPONENTS

- Purposeful technology investments that power digital strategy.
- Clear linkage between technology and how it enables the strategy.
- Strategy without defined technology solutions can erode value. Technology solutions without strategy can limit value potential.

Digital Change

Meaningful and impactful digital transformations are typically backed by a powerful digital strategy, brought to life by strategic and thoughtful technology investments, and underpinned by change capabilities.

Deloitte's Digital Transformation

Digitals strategy driving a new experience for organizations and employees

Building out an integrated platform that enables continuous transformation:

- Digitally enabled services through a next-gen ecosystem.
- User experience that is transparent, consistent, and on a user's terms.
- Core of connected data makes it easier to get the job done.
- Service innovation is an integrated capability.

Technology Aligned to Strategy

Deloitte is on a mission to transform talent mobility by creating a next-generation digital ecosystem enabled by a backbone of five market-leading capabilities:

- **User Experience –** User-centric, multiservice experiences adopting cutting-edge technology that are centered on simplicity, integration, and holistic guidance—digitally bringing together our services and advisers.
- **Data Management –** Leverage and integrate data across services and systems to provide critical insights and guidance to assist in making informed decisions for our clients.
- **Analytics –** Integrated insights to enable new data-driven outcomes through proactive analytics.
- **Rules and Workflows –** Rules and workflows integrated across the entire platform to enable personalized services.
- **Ecosystems Integrations and Alliances –** Data and service integration to provide enterprise data connectivity that delivers greater insights with enhanced services and first-to-market products.

COMPONENTS

- Ability to adopt and adapt to new processes, resources, and ways of working.
- Qualitative, human characteristics necessary for a transformation encapsulating a multitude of talent domains.

Global Talent Mobilization Playbook

Digital innovation can change an organization's ecosystem and ways of working overnight. Selecting technology solutions with a strategic mindset—and with solution agility top of mind—can support the talent mobilization strategy, employees, and broader ecosystem to withstand the ever-changing evolution of the global workforce. Global talent mobilization is a business imperative that typically requires mobility leaders to team across their talent, HR, tax, and finance functions to address critical priorities and align on strategy, technology, and risk. These focus areas are critical in cultivating a global talent mobilization function that can dynamically support technology, explore innovative insights, and develop a culture of agility.

STRATEGY AND ALIGNMENT

Strategic, intentional collaboration across the enterprise and its mobility ecosystem is typically required to create a strategy inclusive of modern policies and programs that are economical, sustainable, and competitive in the market.

At the same time, the strategy should be underpinned by flexible, comprehensive technology solutions that enable businesses to deliver a consumer-grade employee experience while effectively addressing workforce compliance risks.

SMART TECHNOLOGY SOLUTIONS

Exploring the digital solutions that best suit an organization's strategy and compliance needs often requires an experienced team that understands

the complex global workforce, underpinning technology, and enterprise ecosystem. The team also needs the capabilities to deliver the technical knowledge to gear up and analyze the right data to help an organization address its largest priorities and complex compliance requirements to proactively optimize the sourcing of global talent to support their business strategy.

MANAGING DEMANDS AND RISK

Regulatory pressures are constantly evolving, and global jurisdictions are becoming increasingly savvy in tracking compliance. Management of diverse move profiles and the downstream risks often requires a proactive approach underpinned by technical knowledge and intelligently designed technology solutions to balance competing priorities of talent strategy, cost optimization, and global regulation compliance.

DELIVERY AND ADOPTION

Having a strategy to address the changes that have transcended on the new boundaryless workforce and leveraging technology designed to manage this evolving ecosystem can allow business leaders today to focus on optimizing costs, providing insights, and helping their businesses to achieve results.

Development of a holistic change management strategy that engages internal and external stakeholders, effective training opportunities, and clear communications to support user adoption can enable the organization to realize its most prioritized goals.

Making a Lasting Human Impact

With the right technology strategy and solutions in place, organizations can operate in an optimal state: delivering efficiencies and allowing for key stakeholders to drive change and make informed strategic decisions that have a significant impact on organizational and talent outcomes.

In today's rapidly evolving business and workforce landscape, organizations that effectively leverage technology within global talent mobilization can gain a competitive advantage. By embracing technology as part of its core strategy, talent mobility can unlock new opportunities for growth, improve workforce agility, and foster a culture of innovation. *m*

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How Deloitte Can Help

Deloitte's Global Employer Services practice is equipped to support global talent mobility functions with their technology strategy, journey, and solutions.

Our robust framework and experienced team support organizations as they assess, strategize, implement, and continuously improve their global workforce technologies. Whether implementing a third-party mobility management system, creating an ecosystem across vendors, developing a data lake, prioritizing AI use cases, or leveraging internal HRIS/ERP systems, Deloitte's proven framework guides us in aligning your global workforce needs and delivering technology solutions with measurable value, an effective user experience, and continuous improvement. Deloitte's subject matter specialists bring the skills, experience, and methodology to curate a technology architecture that prepares organizations to address:

- Policy configuration and development
- Process and workflow optimization
- Bespoke tech solutions, ecosystems designs, and integration
- Testing, training, and change management
- RFP preparation and vendor selection
- Project management of tech implementations
- Loan staff support
- Market insights

AI AND DATA PRIVACY:
HOW REGULATIONS ARE SHAPING THE LANDSCAPE

This article explores the evolving global landscape of AI regulation, highlighting the diverse approaches taken by regions like Europe, North America, and APAC, and emphasizes the importance of proactive engagement with these regulations for businesses operating in the AI space.

By Walter Dannemiller

I recently attended a conference on developments in the cybersecurity and data privacy landscape. But in a room full of lawyers, government regulators, and IT practitioners, all anyone could talk about was the staggering rise of artificial intelligence (AI). I suppose it was to be expected—it's the 800-pound gorilla in the room—a tool that the average person had not heard of a year ago is now being rapidly utilized by individuals and businesses alike.

Early in the conference, an attendee stood and asked one of the panels a vague question: "What do you think of programs like ChatGPT? Are they a fad, or will they become an integral part of business and society moving forward?" As quickly as the question concluded, a well-known legal scholar sitting on the panel quipped "Stop using it; we're all gonna die." Certainly a dramatic response but one that is striking a chord with government regulators. History proves that regulation almost always follows innovation,

and the rapid deployment and adoption of AI tools is no exception. So, let's look at how the global regions are addressing these concerns.

Europe

The European Union continues to solidify itself as the global leader in the regulation of consumer data and its interaction with rapidly changing technology. From the renowned General Data Protection Regulation of 2018 (GDPR) to the recently proposed European Union AI Act, the EU Parliament has shown its preference for taking early and proscriptive action in these matters. The first of its kind, the European Union AI Act, in its draft form, will apply to all entities involved in the creation or dissemination of AI tools within the EU.

The act aims to restrict or prohibit certain uses of these tools including social scoring, predictive policing, and biometric identification. The act will also require generative AI systems to credit copyrighted materials in training models and label return results as AI-generated. Penalties associated with violation of the EU AI Act are more substantial than those imposed under GDPR, and European citizens will have the ability to file complaints directly with local regulators. The EU AI Act is predicted to come into force sometime in 2025.

In contrast to the EU's proscriptive approach to the regulation of AI, the United Kingdom plans to leverage its existing privacy laws and regulators to oversee AI, with a dedicated task force collaborating with generative AI companies to set safety and security standards. Although the precise mechanisms for accomplishing this remain unclear, the overall approach aligns with the U.K.'s pro-growth and innovation-oriented policy framework announced in March 2023, which emphasizes fundamental principles for AI regulation including security, transparency, and redress.

North America

In the United States, AI regulation is still evolving, with various state and federal initiatives offering insights into future regulation. In Congress, though no comprehensive stance has yet materialized, several bipartisan bills have been introduced, each focusing on different policy issues. In September, the U.S. Senate began holding a series of forums to educate lawmakers on these tools. Simultaneously, the White House has introduced a "Blueprint for an AI Bill of Rights" that outlines five voluntary principles to guide the design and use of AI, which has already been adopted by seven major U.S.-based tech companies. The National Institute of Standards and Technology and the National Artificial Intelligence Advisory Committee have each advised on managing AI-related risks to individuals, organizations, and society. Such frameworks are expected to receive deference from the federal government, paving the way for a national standard if approved.

In the absence of federal action, six U.S. states have enacted or will enact laws by the end of 2023 on the topic of AI. California's Governor Gavin Newsom signed an executive order directing all state agencies to develop reports and guidance regarding the use of such technologies, aiming to cement California as a leader in AI innovation and regulation.

In Canada, Parliament is working through the Artificial Intelligence and Data Act (AIDA), which is designed to place responsibility on

entities for the AI activities that they develop or deploy. If ratified, the AIDA will require businesses to identify, address, and document potential risks and biases in their AI systems; assess the intended uses and limitations of their AI systems, ensuring user comprehension; and implement effective risk mitigation strategies and maintain ongoing system monitoring.

APAC

The regulatory landscape for AI in the APAC region remains largely uncharted. However, China has recently emerged as the AI leader in APAC, implementing its initial set of regulations governing such tools. These regulations, which came into force in August, are applicable to companies involved in generative AI technology offering services to the public, requiring them to obtain a license from Chinese authorities before conducting operations within the country. Once licensed, these providers are obligated to conduct routine security assessments of their platforms, document with the government all tools and systems capable of influencing public sentiment, and ensure the protection of user data, all in the name of safeguarding China's "core values of socialism."

Other countries in APAC like Australia and Taiwan are leaning toward more prescriptive regulations, while Singapore and Hong Kong opt for voluntary guidelines. South Korea and Japan plan to combine government guidance with sector-specific restrictions.

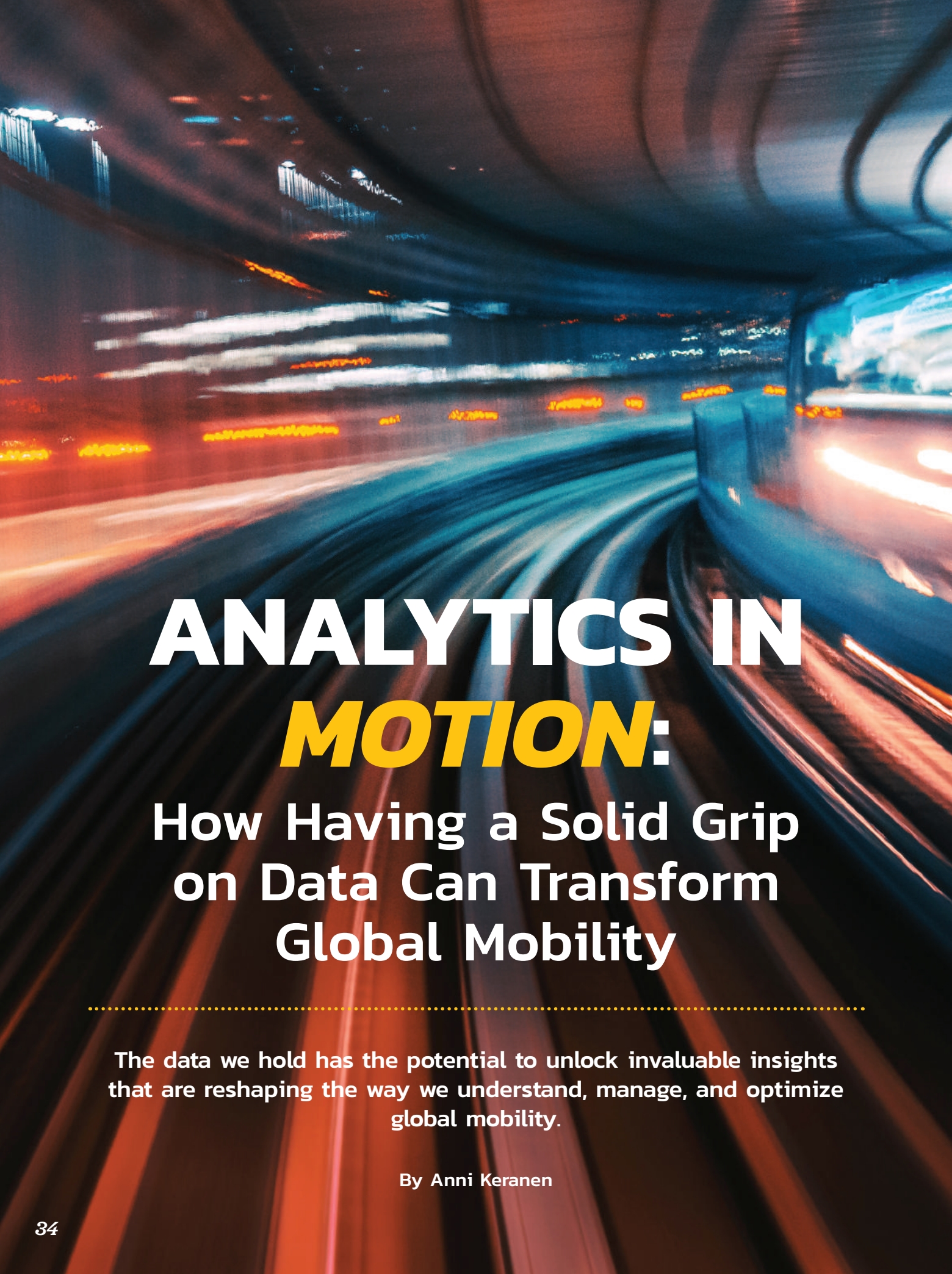
Impact to Global Mobility

For businesses operating in the global mobility industry, it is important to take note of the regulatory patchwork that is certain to come into effect as the use of AI becomes more mainstream. Businesses can best prepare by understanding how regulatory authorities view and govern the various AI tools they'd like to deploy. This will allow compliance measures to be seamlessly integrated into deployed AI tools, leading to a better-quality product. It is also important for businesses to consult with their clients and transferring employees to understand whether the use of AI related to the provision of services is acceptable. Remember that AI tools use large amounts of data, including personally identifiable data, to produce outcomes. Even if a business is complying fully with AI and data privacy regulations, it may be the policy of the client or the preference of the employee to not utilize such AI-based tools due to security and ethical considerations. In this case, disclosure and transparency are key.

Conclusion

In the rapidly evolving landscape of AI regulation, it's evident that AI is no longer just an emerging technology evoking curiosity but a critical consideration for governments, businesses, and society. While we won't know for some time whether the conference panelist was correct or if the unbridled embrace of AI tools is just another Y2K moment, proactive engagement with evolving regulations will be vital for businesses to thrive in this dynamic, interconnected landscape. *m*

Walter Dannemiller is the vice president of legal for Dwellworks LLC with responsibility for all aspects of the company's global legal and compliance affairs. Prior to joining Dwellworks in January 2019, he served as legal counsel for a large commercial laundry retailer.



ANALYTICS IN *MOTION*:

How Having a Solid Grip on Data Can Transform Global Mobility

The data we hold has the potential to unlock invaluable insights that are reshaping the way we understand, manage, and optimize global mobility.

By Anni Keranen

In an era characterized by unprecedented connectivity, the dynamics of global mobility are rapidly evolving. Every move across borders generates an avalanche of data. This information holds the potential to unlock invaluable insights that are reshaping the way we understand, manage, and optimize global mobility.

Data analytics has been a hot topic within our industry for a while now, and we often get questions from our clients on how to do it better. Imagine harnessing the power of data analytics to predict move patterns, enhance the expatriate experience, and ensure seamless immigration processes. Artificial intelligence (AI) is predicted to revolutionize data analytics, but there is still a lot that needs to be clarified about its potential and limitations. In this article, we delve into the transformative impact of data analytics on global mobility, exploring how it is empowering teams.

A Wide Variety of Data

Each global mobility team sits on top of a lot of data, and the more assignees your team looks after, the more data there is at your fingertips: where your mobile employees are, where they come from, where they are next going, when they started and finished their assignments, etc. The teams handle salaries in both home and host countries, pension setups, bonuses—and, of course, assignment-specific benefits and allowances. You have access to the gender balance of the assignee population, the family compositions, children's dates of birth and which schools they go to, and what kind of pets they have. Nationalities, citizenships, passport numbers, visa expiry dates, how much their rent is and when it's up for renewal … the list goes on and on. However, unless data is gathered and analyzed, the relevance at a macro level could be lost. In addition, more data does not automatically equal better data if you don't know how to use it to your advantage.

Global mobility data is both qualitative and quantitative and goes beyond what any regular HR team normally has access to—and for good reason. While your employer doesn't usually need to know how many kids you have and how old they are, if you are sending someone on assignment, it's crucial to have this information to make sure that they are appropriately taken into consideration when the assignment package is drawn up. It isn't that global mobility is overly nosy; it is all serving the single purpose of making sure processes, packages, and support levels are right for each assignment.

Nonetheless, not all teams are able to convert this privileged access to information to their benefit. A lot of larger programs use technology, but that alone doesn't mean they are utilizing any analytics capabilities. After all, the world's most popular assignment management system is still Microsoft Excel, despite huge interest in AI. If your data is scattered around dozens of tabs in hundreds of spreadsheets, or if you're not taking advantage of the full analytics capabilities of the reporting suite of your assignment management system, it's likely that it isn't being harnessed to its maximum potential. Managing data manually takes up a lot of time, and it doesn't exactly lend itself to convenient analysis.

When COVID-19 hit and companies realized they had employees stranded in multiple countries without a clear overview of who was where and whether they needed assistance, this lack of oversight became evident. Knowing where your workforce is shouldn't be this difficult in this day and age; in fact, it should be considered essential for any employer.

Improved Cost Control

Everyone involved in global mobility knows mobile employees are more expensive than regular ones—the average assignment is three to five times more expensive than keeping that same employee in their home role in the home location. However, the overall cost can still come as a rather bleak surprise to the business, especially if cost estimates are not part of the assignment sign-off process. The employers that run cost estimates as part of their planning are typically not only better aware of their cost but also their value.

Typically, a cost estimate will cover four components that make up the total cost of the package: salary, annual benefits, one-off relocation costs, and tax and Social Security liabilities. The salary component makes up a large portion of the total costs and includes any additional allowances and pay adjustments, such as mobility premiums or bonus payments. The annual costs include the ongoing benefits provision (such as housing, school fees, or a company car), whereas the one-time costs occur at the start or end of an assignment (things like a pre-posting medical, flights, and shipping). Lastly, the tax and Social Security contributions are calculated on the total value, and they have the

potential to make up a significant proportion of the overall move costs.

If you run cost estimates, and especially if you do so through an assignment management system, it is far easier to stay on top of what your globally mobile workforce is costing the organization. It is also easy to start analyzing the variety of cost areas that make up the total. For example, you can focus on costs for a particular region (How much do my U.S. outbounds cost? What about U.S. inbounds? Or Americas as a whole?), or policy type (What is the difference between home-based packages and local ones?), or even drill down to the level of individual package components (How much are we paying for housing globally, regionally, and per location?).

Methodically utilizing cost estimates for your entire population also unlocks the potential for making a comparison between your actual costs and the forecasted ones. This is something that is commonly on the radar for global mobility teams; however, many struggle with the collation of the actual costs data, and thus give up on the exercise. Having said that, running the comparison will illustrate whether you are over- or underestimating your assignment (and overall program) costs. The easiest way to compare your invoiced amounts and the forecasted ones is to rely on a service provider that manages all payment data (or even the actual payments on your behalf!) integrated into your assignment management system. Alternatively, you could run the comparison before approving any invoice.

> Working smarter with data can lessen the requirement to go through disruptive policy and process reviews in the future.

Being able to run this level of cost reporting and analysis is a significant asset to becoming more strategic. Business is driven by numbers, and if you can deliver valuable insight to unlock better business decisions, your role as an adviser to the business is going to be greatly valued. Often, global mobility can be perceived as the blocker—because we know the repercussions if relocations and compliance aren't done properly, and we tend to say that out loud—but changing this perception into a business and growth enabler will elevate the status and importance of the function. Who wouldn't prefer to be part of the planning process rather than just the admin team that implements what was decided behind closed doors?

Easier Compliance Adherence

In the ever-evolving compliance landscape of global mobility, where authorities around the world are looking for ways to increase their revenue, two critical pillars stand out: tax and immigration. When individuals cross borders, the complexities of tax regulations and immigration requirements can pose formidable challenges. However, utilizing data analytics within your global mobility program offers a great solution, harmonizing your processes and making it harder to find yourself noncompliant. By mitigating risks, your global mobility team can fix issues before they escalate, saving the company from costly penalties if they are caught breaking the rules, even inadvertently.

Everyone moving to another state or country triggers tax implications. Each jurisdiction wants to maximize its taxable income, and in recent years we have seen more and more countries enforce earlier liability cutoffs for people crossing borders. How can data analytics help? Tracking people and days spent in the country becomes a much easier task if you are using technology. You can set it up to pre-emptively flag likely problem cases so you know where to expect trouble, or at least know those cases are likely to require more care or manual input. Alternatively, you can be notified when tax is about to be triggered and take appropriate action at that point rather than after a limit has been breached. Additionally, tracking international remote work requests is another way to improve compliance and collate data trends. For example, you could analyze whether the number of requests has remained at the same level as in the immediate aftermath of

the pandemic, or how long they are on average, and use the findings to drive your policy.

Moving talent around the world is closely intertwined with immigration, and meeting the regulatory requirements of host countries is crucial to ensuring your employees can continue to live and work in the host location. Data-driven systems facilitate meticulous record-keeping, ensuring that documentation requirements are met for each relocation. Saving everything systematically means that when you're asked to produce any documents, it's quick and easy to retrieve the paperwork because it is not scattered across multiple locations. Data analytics can also help streamline the visa and work permit renewal process because all the information—including expiry dates—is stored centrally. This means automatic notifications can be sent out when it's time for a renewal process to kick off, saving you from manual tracking.

Actionable Insight to Drive Decision-Making

Data analytics plays a pivotal role in measuring, understanding, and optimizing key performance indicators—and I don't just mean individual employee performance, but how well your program overall is performing over time. How satisfied are your employees, and are they progressing to more senior roles after coming back? Imagine you had a location that was a bit of a hotspot for failed assignments, and by analyzing the factors behind people's decisions to go back home or leave their jobs, you spotted the issue and adjusted your policy; most likely, since the change, failures would no longer trend higher than in other locations.

When data is used well, global mobility teams can harness its power to identify trends, support decision-making, and drive efficiencies. You can transform raw data into actionable insights; for example, consider a manufacturing company planning to open a new factory in a new country. Assessing its talent pool based on previous successes could help it build the best team to get the new facility up and running. Furthermore, analytics could show how much could be saved by hiring a team locally, or by choosing a commuting arrangement from abroad rather than sending someone there for two years accompanied by their family.

We all know that going through a major policy change is a huge, time-consuming process, but we are also aware of how frustrating it is to keep making the same exceptions repeatedly. Data analytics enables you to identify what is working and what needs tweaking. This process of continuous improvement ensures your program keeps up with a world that's constantly evolving, not only in terms of remaining compliant but also meeting the expectations of your employees. Working smarter with data can lessen the requirement to go through disruptive policy and process reviews in the future. Keeping your program fit for purpose means you stay ahead of the curve and gain a competitive advantage.

Unlock Your Full Potential

In conclusion, data analytics is a catalyst for transformation for all of us in global mobility. By leveraging data-driven insights, global mobility teams can enhance efficiencies, improve compliance, and raise their strategic decision-making profile. Embracing data analytics ensures that global mobility programs remain adaptable and effective in a rapidly changing world because its power is not only in its ability to interpret the past but also in its capacity to shape a dynamic and successful future. *m*

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Technology Strategies for a Relocation Department

Content provided by the Relocation Directors Council

BY TAMMY VLAH AND MOLLY SPALDING

As relocation directors, we are tasked with managing and training on a plethora of technology platforms. The use of technology can streamline and enhance various aspects of the relocation process, making it more convenient and less stressful for all parties involved. When we combine technology with automation, we can increase efficiency and minimize risks—especially in the industry today where there has been an enormous focus on the customer experience, improving automation, and a general sense of making everything "Amazon Prime."

Technology enables seamless communication between our staff and agents, transferees, and relocation companies. Through email, relocation company portals, and messaging apps, important information, documents, and instructions can be shared quickly. This not only ensures that all parties are on the same page, but it also safeguards the security of personal information.

Many of us manage a high number of different portals based on the referring company, and while many portals generate communication regarding the status of the referral or maintain critical components, there can also be a disconnect in these portals where the relocation department does not receive key notifications, which causes a delay in connecting with the transferee. We appear unaware of the "time is of the essence" aspect the transferee is under. Portals are crucial to this fast-moving industry, but we want to strike a balance between technology and human follow-up.

With the ever-changing landscape of relocation, many relocation management companies have determined that using services and technology can alleviate some of the pressure on their consultants, giving them more time to focus on the transferee's needs and not so much on paperwork. Our relocation departments are not much different. Using technology can save the relocation director time, improve the transferee experience, and help align with sustainability efforts.

RELOCATION GUIDES

Take relocation guides as an example. Technology can help highlight the new location

for a family that may not be able to travel to the destination. Think about using services, like Canva, to create an area orientation tour of the city showcased in a virtual book. Create the content and update the information in real time providing current information to all transferees. This can be a valuable tool, eliminating the need for printed relocation guides that cannot be updated as quickly as the world is changing. There are other companies, like Sunray Publishing, that provide electronic relocation guides allowing customization and supporting the department's green efforts.

RELOCATION DATABASE

One of the most complex advances for the relocation department has been the evolution of a centralized relocation database. These systems have streamlined communication, making record retention easy, and provide reporting that is pushed directly to the relocation director, the brokerage senior leadership, and managing brokers. Many provide agent dashboards for easy management of action items, tasks, and current relocation transactions. A benefit of these systems is the incorporation of data feeds and application programming interfaces with other brokerage software helping to eliminate duplicate entries, highlight referral conflicts, and increase communication and data maintenance across the entire brokerage. Not to mention, many transferees want text as preferred communication, and these systems have SMS capability built right in. Creating company-branded communication that is automated, including data flow, has given our relocation staff more time for their soft skills and to focus on the customer experience. If you are interested in streamlining the process, consider eRelocation or Constellation1 for database solutions.

RELOCATION AGENT TRAINING

Many brokerages already have a learning platform for the entire agent population. Consider using that internal learning system to create on-demand relocation learning paths for agents to become relocation trained, receive annual training, and create a partnership with the department. For example, our learning platform, Litmos, allows us to create learning paths for our relocation agents. Most recently, we created a five-part series on how to complete the new 2022 Worldwide ERC® Broker Market Analysis (BMA) form. The learning path is hosted on our internal learning platform, and agents can complete the series at their own pace. The interactive training provides a clear understanding of how to complete the form, expectations on compelling and comprehensive data, how to showcase the agent and marketing of the property, as well as learning how to complete the form within our relocation database ensuring no lost data in transit.

Using a platform the brokerage already has in place will make training a breeze. Alternatively, create a presentation allowing artificial

Takeaways

- Support sustainability efforts by creating virtual area orientation tours and community guides.
- Use centralized relocation software to eliminate duplicate work.
- Take advantage of brokerage programs such as a learning platform or CRM.
- Lean into video to elevate department messaging.

intelligence to help script the training, then take advantage of platforms like Zoom or Microsoft Teams to record the training and upload it to the company system, allowing agents to access it on-demand. This recorded training will never take the place of traditional in-person training, but the benefit is the relocation director can spend more time focusing on new content instead of the routine training that needs to happen.

CUSTOMER RELATIONSHIP MANAGEMENT PLATFORM

Just like training platforms, many real estate companies have a customer relationship management system, or CRM. As relocation directors, we should leverage that existing platform and utilize it for the relocation department. Many of the templates in these systems can be easily customized, updating the content to suit department messaging. For example, the CRM system may have a renter campaign already established, which can be sent to all the renters in the relocation database trying to capture additional business for the department. Think broadly about how to utilize this company system to send consistent messaging out to relocation agents, referral contacts, existing customers, corporate clients, and personal networks. Create a relocation marketing strategy that encompasses gratitude, market updates, and outlining the department services and coverage areas. Once you import all the contacts and categorize them, the CRM allows the relocation director to set it and forget it.

VIDEO

By embracing the use of video, we can efficiently and effectively communicate directly with our network and customers. This is an easy way for us to stand out from all the noise and deliver messaging that is more readily received. The most well-received video messaging is not professionally produced but rather recorded on a mobile device and edited using Vimeo or CapCut. To help the brokerage stand out, consider having relocation agents create a short introduction video that can be sent to the customer while they are waiting to connect with their hand-selected agent. The use, access, and usability of these mediums are at our disposal. We challenge relocation directors to think differently, take tools already provided by the brokerage, and adapt them into ideas that advance existing efforts and strategic goals.

Incorporating technology into the relocation process has proven to be beneficial but, as mentioned early on, it's crucial to strike a balance between technology solutions and human support to help transferees and their families adjust to their new environment. Taking advantage of the tools to streamline efficiency will give you that time for the personal touch. *m*

Tammy Vlah, SPHR, is the executive vice president at Watson Realty Corp. Vlah oversees all aspects of referral and lead management for both the brokerage and holding company as well as the residential side of Watson Asset Management, a division that lists and sells bank and other corporate-owned properties. **Molly Spalding, CRP, GMS**, is a director of business development at BHHS PenFed Realty. Spalding has over 20 years of real estate and relocation experience.

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Spotlight

Auckland, New Zealand

BY BETHANY LARRAÑAGA

Friendly Auckland, New Zealand, offers a relaxed lifestyle, surrounded by beautiful natural landscapes ranging from mountains to sailing harbors. As the country's largest city and economic hub, expats can expect to find a thriving job market, immerse themselves in a diverse cultural scene, and enjoy a variety of recreational offerings—from the vibrant arts culture to adventurous outdoor activities and exciting sporting events.

Snapshots

Calgary, Canada

Vienna, Austria

Doing Business in Auckland

New Zealand ranks 50th of the major global economies and is expected to reach a gross domestic product (GDP) of US$249.95 billion by the end of 2023. Auckland accounts for nearly 40% of the country's GDP and is regarded as the nation's economic powerhouse. Home to a range of industrial sectors, key industries include advanced manufacturing, construction, technology, and international education.

Professionals should expect to follow the cultural guidelines of Auckland's business scene. Being considerate of others' time is regarded as good etiquette in and outside the office. Expect to schedule appointments with business partners or senior managers well in advance, and be sure to take into account that December and January are the typical months for New Zealander summer vacations. Punctuality is also highly valued; employees should expect to arrive at business functions early as a sign of respect. Being late or absent without advance notice is seen as unacceptable and a reflection of untrustworthiness.

New Zealanders value friendliness, and opening the conversation with casual but impersonal topics like the weather is seen as good practice before beginning formal discussions. While meetings may have a relaxed atmosphere, they are still seen as serious events. Employees of all levels are expected to contribute to the conversation with facts and figures. Avoid lofty claims or bells and whistles—colleagues and senior managers are concerned with concrete examples of how a proposed project or solution will be put into action.

For the dress code, plan to dress conservatively, leaning toward formal. It's common to wear dark business suits, or modest dresses for women. During warmer weather, it is acceptable to remove your suit jacket and roll up shirt sleeves.

Family and Living

Ranked second in the 2021 Global Peace Index's safest countries in the world, expats can feel at ease as they explore and get to know New Zealand's most populous city. Over 1.5 million residents call the Greater Auckland area home, and its history tracing back to the days of Māori settlement has brought together an array of diverse cultures and ethnicities to experience.

For families with school-age children, a Dependent Child Student Visa is required to enroll a child in primary or secondary school. Education is compulsory from ages 5-19, and there are a number of state, private, and international schools available across the city. If planning to move around a child's school year, local schedules differ from the Northern Hemisphere—there are four terms spanning from late January to mid-December.

Housing costs in Auckland are some of the highest in the country. Newcomers can expect accommodation to be their biggest expense—a one-bedroom apartment in the city center averages NZ$2,100/US$1,240. There is also a soaring demand for housing, making finding accommodation without the assistance of an employer or realtor difficult. A greater selection of housing options at lower prices can typically be found closer to the city suburbs.

Owning a car in the city comes with pros and cons. Commutes are typically long due to dense traffic, but a personal vehicle adds convenience to nearby outdoor activities like hiking, beaches, and camping. For everyday travel, public transportation is affordable and reliable.

New Zealand boasts globally ranked health care and provides free medical care for accidental injuries, regardless of residential status. Free health care is offered to residents and holders of two-year or longer work visas (dependents of visa holders 17 years or younger are also covered). However, wait times for specialists can be long, and many expats opt for private health insurance.

Immigration and Permits

Permit and visa applications can be primarily done through New Zealand's immigration website, which responsively walks visitors through visa types. There are several kinds of work visas with detailed descriptions and requirements listed. Applicants will be notified whether they need to send in their physical passport or will be receiving an electronic visa (eVisa). An online account through the immigration website is required to access an eVisa and copies may be printed out to keep on your person.

Some work visas include paths to residency, such as the Skilled Migrant Category Resident Visa, the most common selection for professionals coming to New Zealand. Processing times vary and can range from 21 days to 15 months.

Unexpected Auckland

Auckland enjoys beautiful and varied natural landscapes thanks to its positioning next to the Waitākere Ranges and Tasman Sea. Nearby Takarunga stretches as the highest volcanic peak on Auckland's North Shore and is one of 63 mountains accessible from the city. Visitors can follow over 250 kilometers of walking tracks to explore waterfalls, cliffs, and Māori heritage sites. Auckland sits on two harbors, and its reputation as a boating destination has earned it the nickname "City of Sails." Over 80 beaches offer sun and sand from anywhere in the area, each with a distinct personality and locale.

While you're exploring the beaches, stop by a scenic waterfront restaurant for beautiful sunset views and fresh coastal dishes. Home to the largest Polynesian population in the world, visitors and locals alike can dive into hundreds of fusion eateries rooted in 700 years of Māori culinary history.

Sports fans also have plenty to enjoy in Auckland. The city is home to some of the country's biggest professional teams in rugby, basketball, baseball, and more. The New Zealand All Blacks rugby team offers fans a family-friendly immersive experience and hosts games in the city center.

Calgary, Canada

Originally a Royal Canadian Mounted Police (Mountie) post, Calgary's western charm blends with an advanced energy industry to stand as Canada's third-largest city and oil industry capital. While oil, gas, agribusiness, and engineering are leading industries, Calgary's sustainable and renewable energy sector is rapidly growing—the city has been ranked as one of the top 15 clean technology ecosystems in the world.

While every bit of a commercial hub as nearby Vancouver, Calgary's cost of living is comparatively lower. The city is family-friendly due to free public education for residents, low crime rates, and no-cost health care. The downtown area features an array of entertainment options, from museums and music to local sports arenas. Public transportation isn't as connected as Canada's other major cities, but drivers can still cut costs thanks to affordable gas prices across the province of Alberta.

Affectionately known as Cowtown, Calgary's annual stampede draws hundreds of tourists in celebration of cowboy traditions. Outdoorsy expats can enjoy all-season sports and activities thanks to the nearby Rocky Mountains and temperate climate. Despite the city's wild-west persona, Calgary is a diverse city that welcomes expats, with immigrants comprising nearly a third of the population.

Vienna, Austria

As Austria's capital and cultural mecca, Vienna has graced history books as the home of Freud, Beethoven, Mozart, and other notable figures. Its intellectual and cultural legacy continues to attract new residents and cultivate the minds of 2.4 million across its metropolitan area.

While it can be easy to become lost in Vienna's rich artistic and academic history, the city is surprisingly industrial. More than half of Austria's capital goods are produced in Vienna, where machinery, electrical and metal products, oil processing, and brickmaking are the leading industries. The city hosts several trade fairs every year, bolstering economic growth and industrial development across the country.

Twenty-three boroughs make up the residential landscape of Vienna, with classes, cultures, and costs blending across them all. A unique layout helps newcomers orient themselves with ease—the city's numbered boroughs are arranged counter-clockwise starting in the east. Housing costs reflect Vienna's position as one of Europe's busiest hubs and are the highest across Austrian federal states.

Professionals relocating to Vienna must adhere to strict immigration guidelines to obtain their Austrian work permit, locally known as a Red-White-Red Card. Application requirements can vary depending on industry and country of origin, with costs starting around EUR€120. The Austrian government website has an in-depth online guide for business immigration to assist with the process.

Box It Up For The Holidays

Make Their Next Move, A Reason For Celebration

BY KAREN BANNON, DIRECTOR OF MARKETING & ESG

Whether you start preparing for the holidays during the summer or are more of a last-minute shopper, you will no doubt need to focus on two things: packing your gifts with care and getting them to the recipient in time for the holidays. Just like receiving that perfect gift, your transferees will feel special and cared for when you provide them with the added benefits that only Arpin's FastPAC containerized shipping program offers. Who knows, they may even send you a sweet treat for your thoughtfulness! :)

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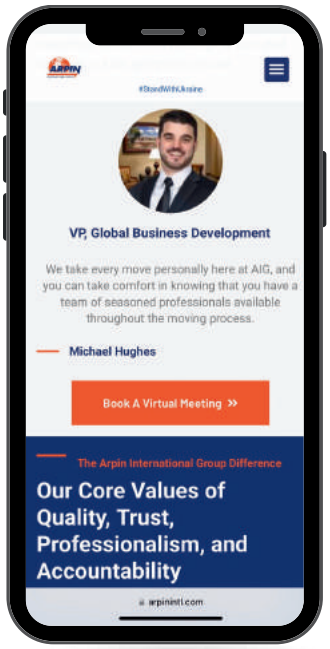

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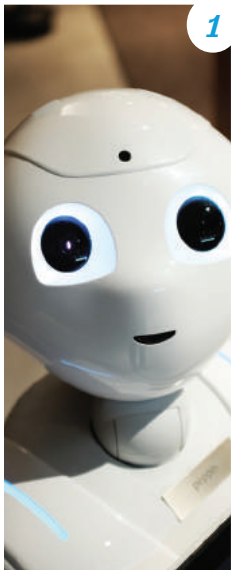
Mobility Matters

How the World Is Harnessing Technology

BY BETHANY LARRAÑAGA

When we think of the future, what does it look like? Robots, driverless cars, or connection for all? The world's leading cities are finding new ways to use technology to shape our future, from the seemingly mundane to movie-like applications.



1

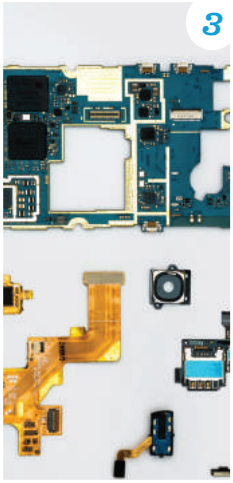
Seoul is becoming "robot friendly" by developing technology for human care. Robots are already working in children's hospitals, senior centers, and entertainment—one designed by the Korea Institute of Industrial Technology performed at the National Theater of Korea as a conductor. Plans are in development to deploy more robots in human care roles in the coming years as the country plans for its aging population.

Source: CDO Trends

2

Berlin's technological growth aims inward as the city strives to provide residents with cleaner, smarter, and improved quality of life. Germany's capital city has harnessed digital infrastructure to expand access to technology with a citywide data platform, energy-efficient buildings through renewable sources, and keep things clean with smart waste and water management that monitors and notifies city departments of issues.

Source: About Smart Cities



3

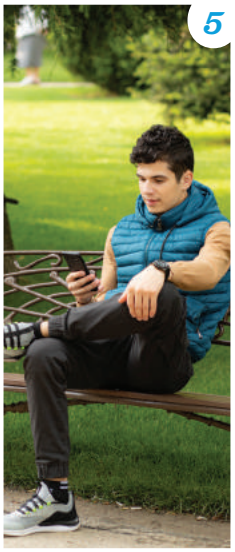
Spanning over 332 acres, the self-sustaining community of Electronic City is home to prestigious educational institutions, advanced technology and information technology (IT) development, and electronic manufacturing. High-tech companies and state-of-the-art research institutions fuel the country's fast-growing technological industry the city, which has earned the reputation of India's own Silicon Valley.

Source: Times Property

4

In San Francisco, riders are experiencing a public experiment through driverless taxis. While controversial, the decision to allow the expansion of "robo-taxis" in the city is seen by some as a potential advancement for riders with disabilities who may be denied ferry when traveling with service animals.

Source: The Guardian



5

Working to combat digital exclusion, the London Plan is the city's approach to improving connectivity and mobile infrastructure. More than 2,000 kilometers of fiber network is planned to be deployed across London's Tube network to provide homes and businesses in areas facing digital exclusion with uninterrupted mobile and digital connectivity.

Source: Centre for London

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