SIRVA Global Advisory Services Practice

Scope of Services Overview
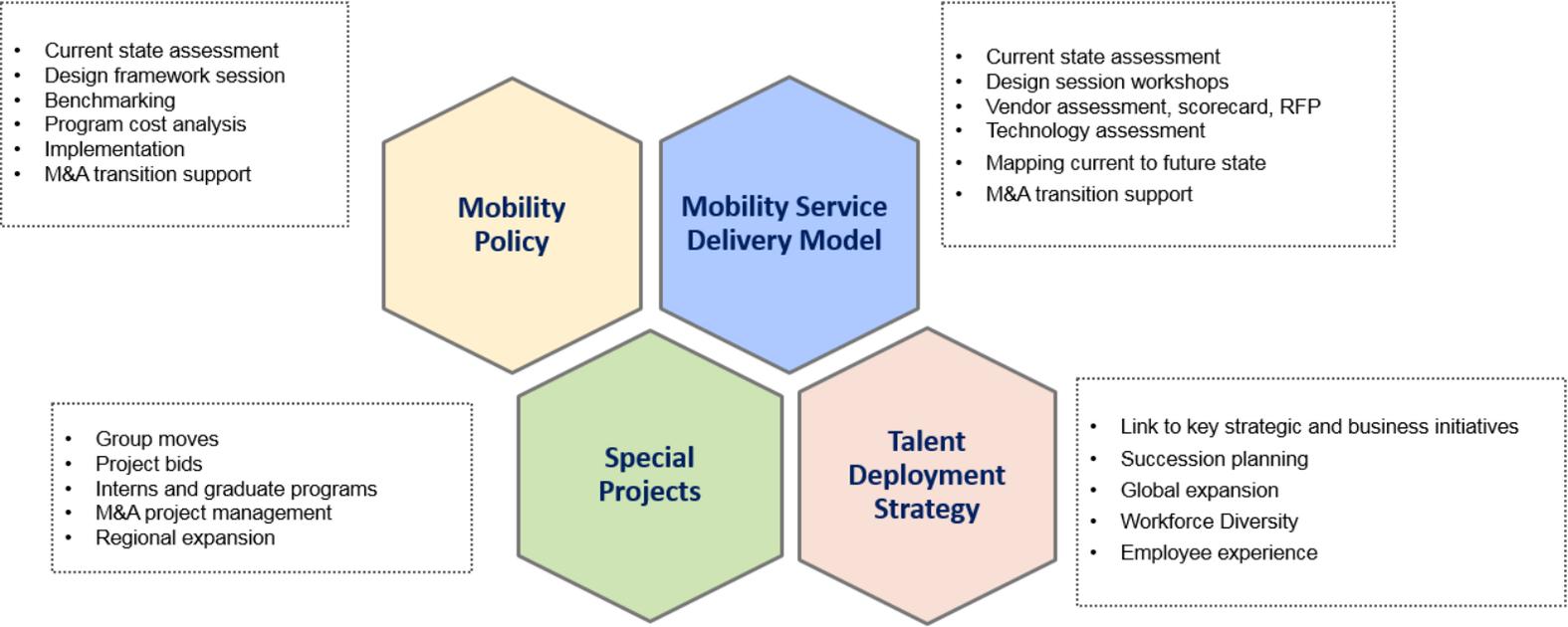
SIRVA®
Worldwide
Relocation & Moving
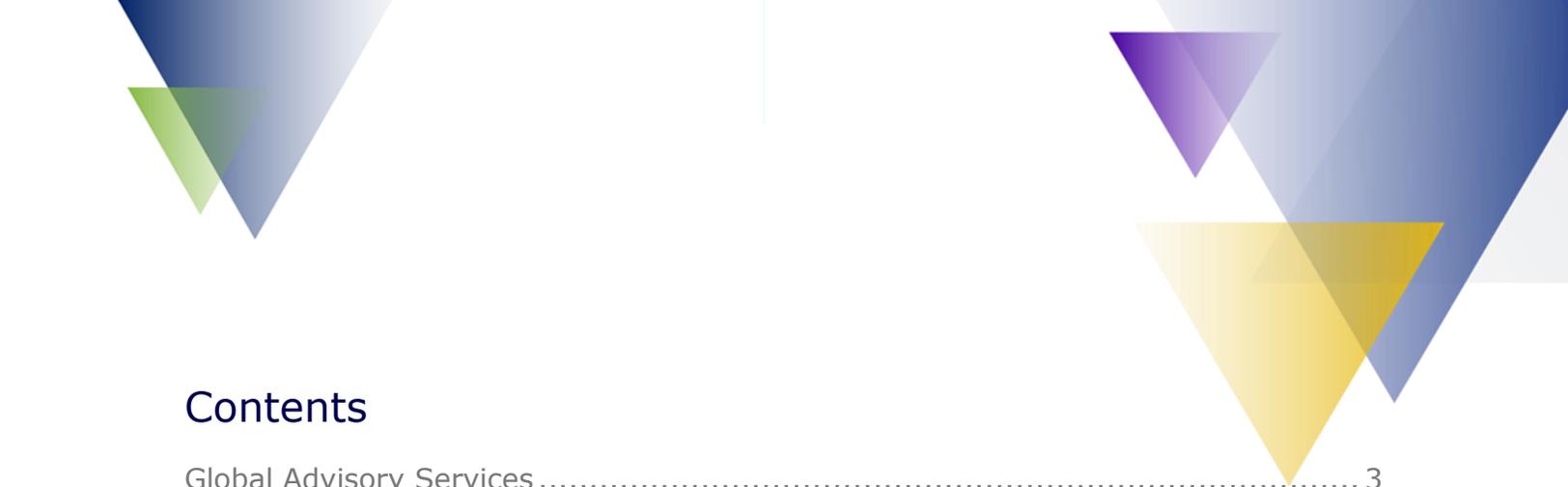
Contents

Global Advisory Services

Thank you for taking the opportunity to consider SIRVA as partner in the design and implementation of your global mobility program. SIRVA's scope of services includes support for design, transformation and implementation activities in the areas of strategy, policy and service delivery model, and covers ad hoc support required for special projects such as group moves and organizational transformations.

Mobility Policy
- Current state assessment
- Design framework session
- Benchmarking
- Program cost analysis
- Implementation
- M&A transition support

Mobility Service Delivery Model
- Current state assessment
- Design session workshops
- Vendor assessment, scorecard, RFP
- Technology assessment
- Mapping current to future state
- M&A transition support

Special Projects
- Group moves
- Project bids
- Interns and graduate programs
- M&A project management
- Regional expansion

Talent Deployment Strategy
- Link to key strategic and business initiatives
- Succession planning
- Global expansion
- Workforce Diversity
- Employee experience

Why Now?

Mobility plays a critical role in the ability of an organization to achieve overall business and talent priorities and to address new and existing global workforce challenges; the mobility function is positioned to boost the value and the impact that mobility has within the organization.

Talent Deployment Strategy

- *Why does the Company need to deploy talent?*
- *What deployment types will have the most impact on the achievement of the organization's strategy and business objectives?*
- *Are there constraints on the type of talent that is deployed?*

Mobility Policy

- *What mobility policies will support Company strategy and business objectives while providing the required flexibility for the business?*
- *How can we maximize ROI?*
- *What is our tolerance for policy exceptions?*
- *What policy documentation is needed for our customers?*

Mobility Service Delivery Model

- *What is the required structure of the function to support Company strategy and business objectives?*
- *What is the functional scope of services?*
- *What are the defined processes, tools and templates to support the function?*
- *What are the FTE/competency requirements?*
- *Who will mobility partner with?*

Talent Deployment Strategy

Services

Mobility Strategy Workshop: SIRVA facilitated session to explore the mobility link to key strategic and business initiatives, including: succession planning, global expansion, workforce diversity and employee experience. Understanding of these areas will help to drive and define the required mobility strategy to support these components. Facilitation includes vision-casting for the future state mobility function

Project Deliverables

Mobility Alignment Business Case: Business case presentation that includes a summary of leading practices as they relate to mobility as a critical business and talent driver and the recommended alignment of strategic and business initiatives and mobility strategy. The business case will include an overview of value-add services provided by the mobility team and a recommended partnership model for mobility and the business. The objective of the business case is to gain alignment from leadership on the value that strategic and business-focused mobilization of talent can bring to the organization

Mobility Policy*

Services

Current State Assessment (CSA): review of current state mobility policies/support and population demographics

Mobility Program (Policy) Framework Design Session: SIRVA facilitated session with identified stakeholders to define mobility drivers and target population

Policy Benchmarking: review of current/future state policies against mobility benchmarks and market practice

Program Cost Analysis: review and analysis of total program spend

Policy Implementation (Go Live)

M&A Transition Support: support provided to organizations who have undergone a M&A that has mobility implications. SIRVA can support to manage the transition, including change management and communications services, transition analysis to determine employee impact, advisory services regarding transition approach (e.g., grandfather, payout)

Project Deliverables

Current State Assessment Report: summary analysis of program current state, including prioritized high-level program recommendations and implementation considerations

Mobility Program (Policy) Framework Overview: Summary of available policies, including intended use and eligibility criteria

Program Decision Guide: decision roadmap to enable pairing of candidates and policy types based on intended policy use and eligibility criteria

Policy Matrix for each identified policy type. Each matrix will outline the available provision, recommended level of Company support, benchmarking and/or market data to support the recommendation, recommended delivery model and/or location (as appropriate) and implementation considerations (as appropriate)

Program Cost Summary: may include current and future state program cost analysis (total spend)

Policy Transition Approach recommendation (Communications and Change Management Roadmap)

Go Live materials: policy documentation, call scripts, presentation materials, FAQ materials

M&A Transition Support: project management services, transition checklists, change management and communications roadmap(s), transition summary materials, net impact summaries, FAQ materials, transition scripts

*International and Domestic services available

Mobility Service Delivery Model

Services

Current State Assessment (CSA): review of current state mobility service delivery model (people, process, vendors, technology)

Current State and/or Future State Process Blueprinting: SIRVA-facilitated process mapping sessions to map current and/or future state. Focus on task detail, roles and responsibilities, handoffs, control points and required tools and templates

Service Delivery Model Design Session: SIRVA-facilitated workshop(s) with identified stakeholders to design future state mobility services delivery model. Focus on decisions regarding mobility scope of services, organizational design (centralized/decentralized, functional alignment), geographical design (regional, HQ), insource/outsource program administration, FTE requirements, competency requirements, vendor requirements, technology requirements

Program Implementation (Go Live)

Geographic Expansion Support: Assistance in the assessment of new country entry requirements – employment, immigration, payroll, tax, etc.

M&A Transition Support: support provided to organizations who have undergone a M&A that has mobility implications. SIRVA can support to manage the transition, including change management and communications services, process and policy rationalization, vendor rationalization

Project Deliverables

Current State Assessment Report: summary analysis of program current state, including prioritized high-level program recommendations and implementation considerations

Current State and/or Future State Process Blueprints: Process map documentation

Future State Service Delivery Model Recommendation: includes detail of recommended mobility scope of services, organizational structure, geographical structure, insource/outsource requirements, FTE requirements and associated competencies, vendor recommendations, technology recommendations

Tools and Templates: Future state tools and templates (e.g., service initiation form, program administrator guidelines, employee welcome package, policy orientation checklist, letter of assignment) to facilitate the mobility process

Vendor Scorecard: Vendor rating based on defined criteria (e.g., alignment with scope of services, cost, satisfaction ratings)

Go Live materials: process documentation, presentation materials, vendor notifications, change management and communication materials

Vendor Training

Process Partner Training (internal)

New Country Entry Toolkit: Tools, templates and advisory materials to assist with entry to a new location. May include summary of immigration requirements, payroll set-up and management support and summary of cultural and political climate

M&A Transition Support: project management services, transition checklists, change management and communications roadmap(s), transition summary materials, FAQ materials, transition scripts, process partner and vendor resources

Sample Deliverables

Program Analytics

Surveys

Current State Assessment

Policy Document

Decision Guide

Assignment Letter Template

Procedures Guide

Initiation Form

Program Framework Overview

Service Delivery Model Recommendation

Process Blueprint

Why SIRVA?

SIRVA feels uniquely qualified to support you throughout any project as evidenced by the following:

▶ SIRVA is one of the most established and sophisticated companies in the global mobility space. Our client base consists of over 500 corporations whose programs often reflect the complexity and scope that companies expect and envision in their own programs.

▶ SIRVA's Integrated Design, Implementation and Execution – SIRVA brings over 50 years of industry experience in the design and management of corporate mobility programs. Our real working knowledge of how the design, implementation and execution of programs work together to deliver top results for our clients. Our Consultants have many years of experience guiding our clients through the numerous options available based on their specific set of specifications. And because SIRVA is so close to the final delivery, we have a keen knowledge of what works well and what only works in theory.

▶ Our access to Mobility Programs and Policies – as a result of our close work with large, multinational/global firms, our ongoing benchmarking of their program components, access to data, policy and process can streamline the process of gathering data to aid in developing programs.

The activities and deliverables listed above are intended to provide additional detail regarding opportunities to partner with SIRVA to address the design and implementation needs of your organization – the list is not intended to be all inclusive.

SIRVA's Global Advisory Services Practice offers comprehensive services that recognise the critical role that mobility plays in the advancement of organisational growth and talent development priorities. One component of our services includes mobility policy (re)design.

We understand your commitment to quality and maintaining the highest standards for your firm. The people of SIRVA share these values and we hope this response demonstrates how we plan to deliver on our commitment to partnership, quality and our goal of continuous enhancement or our services to you.

We look forward to the additional opportunity to present our submission and to provide additional information regarding our project approach, our team, and SIRVA in general.

To learn more about SIRVA's capabilities, contact your SIRVA Account Director or taryn.kramer@sirva.com.