



# SIRVA Global Advisory Services Practice

Scope of Services Overview

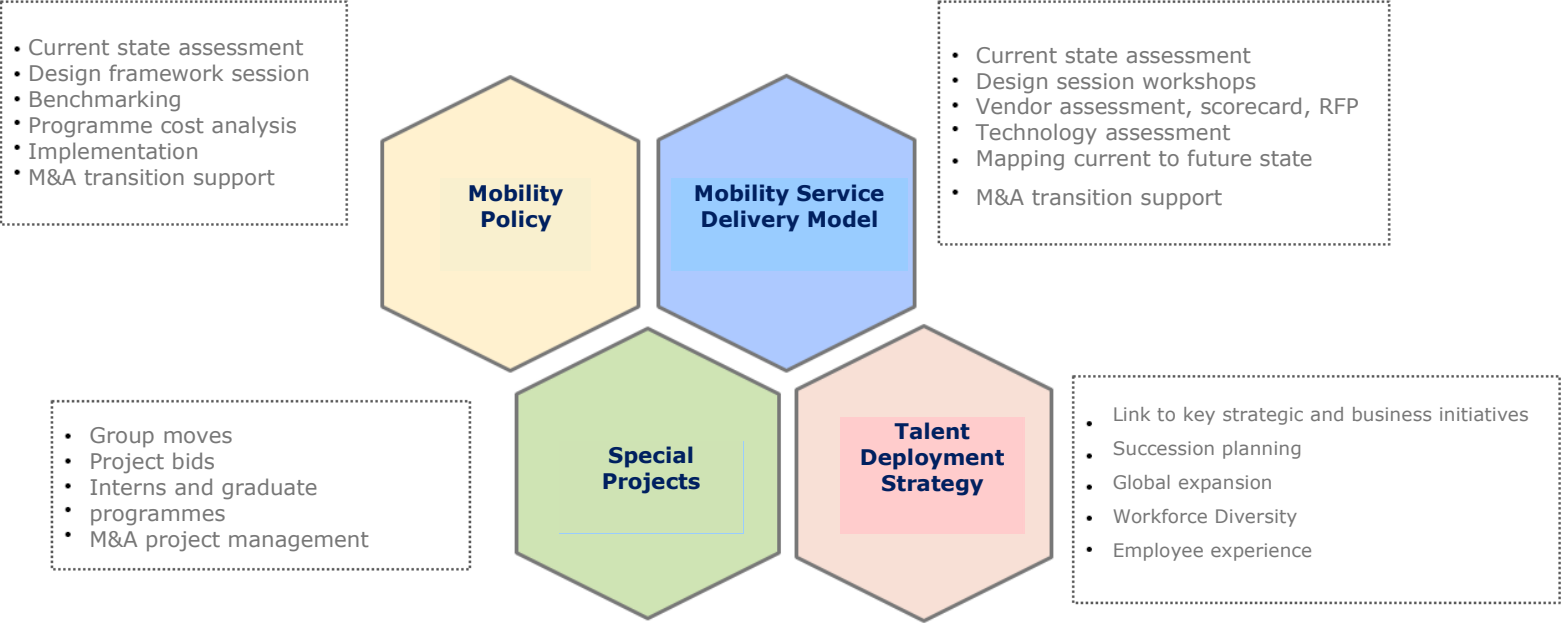


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# Global Advisory Services

Thank you for taking the opportunity to consider SIRVA as partner in the design and implementation of your global mobility programme. 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 organisational transformations.



## Why Now?

Mobility plays a critical role in the ability of an organisation 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 organisation.

### Talent Deployment Strategy

- *Why does the Company need to deploy talent?*
- *What deployment types will have the biggest impact on the achievement of the organisation'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 maximise 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-added 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 mobilisation of talent can bring to the organisation

# Mobility Policy\*

## Services

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

**Mobility Programme (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

**Programme Cost Analysis**: review and analysis of total programme spend

### **Policy Implementation (Go Live)**

**M&A Transition Support**: support provided to organisations 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 programme current state, including prioritised high-level programme recommendations and implementation considerations


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

**Programme 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)

**Programme Cost Summary**: may include current and future state programme 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, organisational design (centralised/decentralised, functional alignment), geographical design (regional, HQ), insource/outsource programme administration, FTE requirements, competency requirements, vendor requirements, technology requirements

### **Programme 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 organisations 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 rationalisation, vendor rationalisation

## Project Deliverables

**Current State Assessment Report:** summary analysis of programme current state, including prioritised high-level programme 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, organisational 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, programme 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

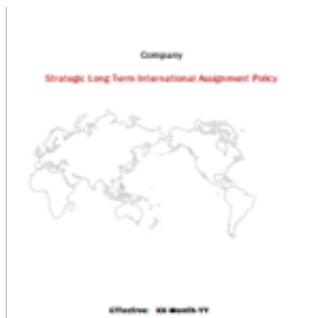
# Sample Deliverables

## 1. Top 10 Home/Host Country Combinations

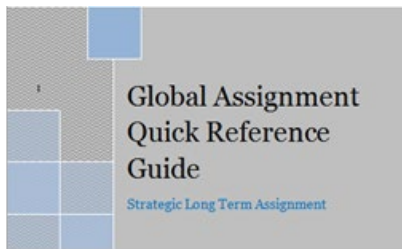
The following table shows combinations for companies as a whole

Home	Host	1	2	3	4	5	6	7	8	9	10
USA	USA	27	20	18	15	14	13	12	11	10	9
USA	UK	18	15	14	13	12	11	10	9	8	7
UK	USA	15	14	13	12	11	10	9	8	7	6
UK	UK	14	13	12	11	10	9	8	7	6	5
USA	Canada	13	12	11	10	9	8	7	6	5	4
USA	Germany	12	11	10	9	8	7	6	5	4	3
UK	Germany	11	10	9	8	7	6	5	4	3	2
USA	France	10	9	8	7	6	5	4	3	2	1
UK	France	9	8	7	6	5	4	3	2	1	0
USA	Spain	8	7	6	5	4	3	2	1	0	0
UK	Spain	7	6	5	4	3	2	1	0	0	0
USA	Italy	6	5	4	3	2	1	0	0	0	0
UK	Italy	5	4	3	2	1	0	0	0	0	0
USA	Japan	4	3	2	1	0	0	0	0	0	0
UK	Japan	3	2	1	0	0	0	0	0	0	0
USA	Australia	3	2	1	0	0	0	0	0	0	0
UK	Australia	2	1	0	0	0	0	0	0	0	0
USA	India	2	1	0	0	0	0	0	0	0	0
UK	India	1	0	0	0	0	0	0	0	0	0
USA	China	1	0	0	0	0	0	0	0	0	0
UK	China	1	0	0	0	0	0	0	0	0	0

**Programme Analytics**



**Policy Document**



**Procedures Guide**

The Company's Global Mobility Framework

The purpose of the Global Mobility Framework is to provide the right support to the right people to the right location to the right time to the right cost. It is designed to ensure that all assignments are managed in a consistent and efficient manner, while also ensuring that the right people are in the right place at the right time to drive the business forward.

Role	Responsibilities	Key Deliverables
Head of Global Mobility	Overall strategy and vision for global mobility; ensure alignment with business goals; manage the global mobility budget; ensure compliance with all relevant laws and regulations.	Global Mobility Strategy; Annual Global Mobility Report; Global Mobility Budget; Global Mobility Compliance Report.
Senior Manager	Develop and implement global mobility policies and procedures; manage the global mobility team; ensure high quality of service; ensure compliance with all relevant laws and regulations.	Global Mobility Policies and Procedures; Global Mobility Team; Global Mobility Service Quality Report; Global Mobility Compliance Report.
Manager	Manage the day-to-day operations of the global mobility team; ensure high quality of service; ensure compliance with all relevant laws and regulations.	Global Mobility Team; Global Mobility Service Quality Report; Global Mobility Compliance Report.
Senior Analyst	Support the day-to-day operations of the global mobility team; ensure high quality of service; ensure compliance with all relevant laws and regulations.	Global Mobility Team; Global Mobility Service Quality Report; Global Mobility Compliance Report.
Analyst	Support the day-to-day operations of the global mobility team; ensure high quality of service; ensure compliance with all relevant laws and regulations.	Global Mobility Team; Global Mobility Service Quality Report; Global Mobility Compliance Report.

**Programme Framework Overview**

4. **TEAM ASSESS**

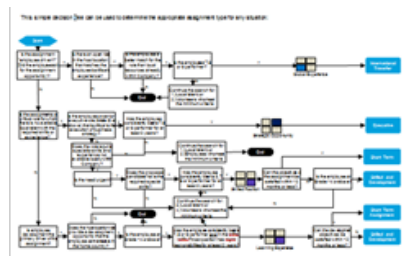
4a. Please indicate your agreement with the following statements.

Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I have the necessary skills to perform in the host country.					
I have the necessary experience to perform in the host country.					
I have the necessary language skills to perform in the host country.					
I have the necessary cultural awareness to perform in the host country.					
I have the necessary flexibility to perform in the host country.					
I have the necessary resilience to perform in the host country.					

4b. Assessment of team

Statement	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
The team has the necessary skills to perform in the host country.					
The team has the necessary experience to perform in the host country.					
The team has the necessary language skills to perform in the host country.					
The team has the necessary cultural awareness to perform in the host country.					
The team has the necessary flexibility to perform in the host country.					
The team has the necessary resilience to perform in the host country.					

**Surveys**



**Decision Guide**

**Assignment Initiation Form**

HR POLICY REGULATORY GROUP

Employee Name	Employee ID	Employee Title	Employee Location
Home Country	Host Country	Host City	Host State
Home Address	Home Phone Number	Home Email Address	Home Fax Number
Home Country	Home State	Home City	Home Zip Code
Home Address	Home Phone Number	Home Email Address	Home Fax Number
Home Country	Home State	Home City	Home Zip Code

**Initiation Form**



**Service Delivery Model Recommendation**

**INTERNATIONAL ASSIGNEE DEMOGRAPHICS**

1. Is there any anticipated increase or decrease in this number in the next few years?

2. Do you have different "classifications" of IAs?

3. What are the types of positions, levels, and salary ranges of your IAs?

**Current State Assessment**

[XXX]

Assignee Name  
[Assignee Title] – Host Employer  
[Assignment City], Host Country

Dear David:

It is with great pleasure and enthusiasm that I confirm your assignment from [Sending Employer] to Host Employer, as [Assignee Title] reporting to [Insert Name]. It is expected that your assignment will last for one (1) year, commencing on August 1, 2012. The effective date of your assignment is subject to the issuance of valid residency, work and/or other permits required to legally reside and work in the Host Country.

**Base Salary**

Your annual base salary will be XXX. You will be eligible for annual salary increases based on individual and Company performance. Salary increases during the assignment period will be in line with home country guidelines.

**Incentive Bonus**

You will be entitled to participate in the Company's incentive bonus program. It has been determined that you are eligible to receive an incentive bonus up to 50% of your annual base salary.

**Assignment Letter Template**



**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 programmes often reflect the complexity and scope that companies expect and envision in their own programmes.
- ▶ SIRVA's Integrated Design, Implementation and Execution – SIRVA brings over 50 years of industry experience in the design and management of corporate mobility programmes. Our real working knowledge of how the design, implementation and execution of programmes 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 Programmes and Policies – as a result of our close work with large, multinational/global firms, our ongoing benchmarking of their programme components, access to data, policy and process can streamline the process of gathering data to aid in developing programmes.

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 organisation – 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 of 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](mailto:taryn.kramer@sirva.com).