

Report
Research
RES FORUM
2020/2021

5

Lean Global Mobility

how GM can become more agile

Report written by Professor Michael Dickmann and Dr. Benjamin Bader

RES FORUM



BGRS



Contact

Report
The RES Forum Research
2020/2021

5

About The RES Forum

The RES Forum is an independent, highly engaged and international community of senior in-house International Human Resources professionals with more than 1850 members in over 45 countries. We are not influenced by external parties or third-party vendors. We share information to make our working lives easier and to assist in solving difficult work challenges.

We collaborate on shared projects and initiatives, and we learn together. Our agenda, set entirely by our membership, is delivered through a spectrum of services including data analytics, Global Mobility and International HR thought leadership and advanced learning and accreditation programmes in the area of Global Mobility management.

The RES Forum cooperates with leading academics in the field of Global Mobility. The main goal is to enhance the practical perspective of the RES Forum with a more academic research approach. We aim to match the understanding of pressing issues in HR management with research expertise in order to achieve academic thought leadership in the field of global HR management.

The RES Forum

T +44 (0)20 7127 8075

E office@theresforum.com

www.theresforum.com

This report is authored by:

Professor Michael F. Dickmann

Professor of International Human Resource Management
Cranfield University, School of Management United Kingdom

Strategic Advisor
to the RES Forum



Dr. Benjamin Bader

Senior Lecturer (Associate Professor) in International Human Resource Management & Deputy Head of Leadership, Work and Organisation Subject Group

Newcastle University Business School, United Kingdom

Strategic Advisor
to the RES Forum



Acknowledgements

Thank you to the following who supported the writing and production of this report:

- Paul Bernardt, **Harmony Relocation Network**
- Matthew Judge, **Anvil Group**

Special thanks to **Jessica Larsen, BGRS** and **Dr. Christoph Schaller, The Lean Group** for your input and insight. And thank you to all the RES Forum Members who took part in the research for this report. Without you, this report would not have been possible.

Note from the authors:

Due to rounding, percentages in all figures and tables in this report may not total 100%.

In association with



Ian Johnson

Senior Vice President
Global Business Development

T +65 6817 8594

E ian.johnson@bgrs.com

www.bgrs.com



Ian Johnson is the Senior Vice President, Client Development, for Europe, Middle East and Africa (EMEA) and Asia Pacific (APAC) geographies for BGRS. He has senior oversight for client development, including assisting and advising multinational organizations to evaluate the operational, financial, and strategic benefits of an outsourcing relationship with BGRS.

With 20 years in global mobility, he has served as a Business Development Director in London; Director, Sales & Marketing, EMEA; Business Development Director, EMEA and APAC, and Senior Vice President, Global Business Development at BGRS. Prior to BGRS, he was General Manager, Germany of a global relocation firm, Managing Director of a global immigration consultancy in London, and Vice President of Sales and Marketing for Asia, Middle East and Africa for a global mobility company.

Ian received a bachelor of arts degree with honors in French, German, and international business.

About BGRS

BGRS develops and implements comprehensive talent mobility solutions for corporate and government clients worldwide. By combining deep industry experience and unparalleled insights on the future of talent mobility, we enable our clients to design mobility programs that empower them to attract, retain, and develop top performers. With more than 1,400 people across six continents, we blend global perspective with local market strength and international business.



Paul Bernardt

Managing Director

T +31 294 415 012

E p.bernardt@harmonyrelo.com

www.harmonyrelo.com



About Harmony Relocation Network

Harmony is a global cooperative network of moving companies and destination services providers, upholding strong family values through generations of heritage, brought together in one truly global and solid infrastructure, providing the same level of high quality services, local expertise and personal commitment, the world over.



Paul Bennett

Co-Founder & CEO

T +44 7801 566 259

E paul@perchpeek.com

www.perchpeek.com



About PerchPeek

Perchpeek was created in 2018 when Paul and his two co-founders, Oliver Markham and Dr Aasis (Ace) Vinayak, realised how painful relocating can be. Their combined experience in business development, machine learning and real estate led them to create a UK property marketplace, dubbed 'Tinder for renting'. In late 2019, they pivoted the business in response to the specific pain points many people experience when relocating. PerchPeek now provides an end-to-end relocation service for a new generation of relocators- those who can work from anywhere- as well as helping some of the world's top companies attract and retain top talent.

Introduction

“An organization’s ability to learn, and translate that learning into action rapidly, is the ultimate competitive advantage.”

Jack Welch

We are now in year two after the outbreak of COVID-19, allowing us to evaluate the restrictions and interventions used to fight the pandemic. For the Global Mobility (GM) industry, the effects are severe. International travel remains extremely limited, and companies are re-assessing the support and care they (can) provide to internationally mobile employees. Some organizations have reduced investment in their GM departments, which includes laying off staff. For many organizations, the outlook for the second half of 2021 is not particularly bright either. GM is at a turning point.

The current market situation has increased cost pressures on organizations all over the world and hard decisions must be made. Consequently, we need to rethink GM – it is unlikely to return to the days before COVID-19. While this may sound pessimistic, it can also be seen as a great opportunity. Jack Welch once said that the ability of an organization to learn and, more importantly, translate the learning rapidly into action, is the ultimate competitive advantage. This does not only apply to organizations as a whole but also to different units within the organization, such as GM. In fact, the last year has provided the GM industry with an abundance of opportunities to learn, even though those lessons have been learned the “hard way”. It is now time to turn those learnings into action.

As a direct response to the cost pressures and ever-changing environment, we introduce a concept that has been around for quite a while in the organizational context but has found little attention in the GM sector: **Lean Management**.

While the principles of Lean theory are not hugely complex, their value lies in providing a clear structure and an aligned intent to create radical efficiency in any production environment. In this regard, Lean is an efficiency-enabler that eventually can save the company a lot of money. With aligned assessment of delivery through the Lean framework, companies can achieve measurable results and elevate the quality of their delivery to improve the function.

In this report – informed by in-depth interviews with Lean and Agile experts, GM professionals, and fellow academics – we explore the core ideas behind the concept and apply it to GM. After explaining the principles of Lean Management, we investigate the importance of thinking in processes. As with almost everything within an organization, an international assignment can be modeled as a process. Therefore, we developed a blueprint model of a (long term) international assignment process. Within this, we highlight bottlenecks and other pinch points that are likely subjects for improvement. This blueprint can be used as a starting point for your organization.

Foreword

What is design thinking?

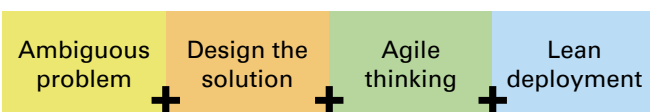
Peter Byebiergaard

BGRS

Over the past two years the world has experienced disruptive changes due to COVID-19. Shock waves keep bouncing and seem only to announce further shock waves that impact us economically and place tremendous strain on our organizations. On our very operating model. The need for change has never been more apparent. Change that will happen within the confines of existing Global Mobility organizations' reality, with potential reduction in available resources, high level of volatility, uncertainty, complexity, and ambiguity (VUCA).

Due to the complexity and velocity of change, as well as the importance of experience – holistic engagement experience – solutions are no longer delivered; they are co-developed with active participation of all stakeholders. Only through an ongoing dialog with the experienter can efficient solutions be developed – solutions that provide the expected experience. The most innovative organizations are already tightly partnering with a network of organizations with whom they develop solutions – solutions to support their customers, as well as solutions for optimizing their operating model.

It is within this context that we propose an approach that combines the strength of three concepts – each on their own tested and proven; namely the concepts found in design-led thinking, agile and lean. At the core is the human centered orientation of design-led thinking, the velocity and adaptability of agile thinking and the stability and efficiency of lean management. Building on Gartner's model (ref. Enterprise Architects Combine Design Thinking, Lean Startup and Agile to Drive Digital Innovation, June 2019) and with a design-led mindset, we perceive the three concepts and the associated tools and processes as spaces. A continuum of innovation where organizations explore and develop solutions. Projects may loop back through these spaces more than once as the team refines ideas and explores new directions, then revisits some of its most basic assumptions – in an iterative approach. We believe it is important not to be limited by each concept on their own but draw on the full suite of processes and tools in orchestrating an efficient, effective, human-centered continuous innovation process.



Design-led thinking works well with an ambiguous problem with no clear or well-defined problem statement and obvious solutions space. Design-led thinking provides an opening into the agile approach with a well-defined problem statement – ensuring that we provide the customer with a solution that works. The iterative approach of the agile methodology provides a steady incremental path which through feedback creates a high level of certainty and structure in the development work. Once a product or service is developed through the agile process, it can be assessed and improved by using lean to identify waste in the current value stream and increase the value to the customer.

A well-known example of combining design-led thinking with an agile process is design sprint – an iterative approach with incremental feedback, constantly aiming at what will bring the customer most value and with an overall customer vision in mind.

We would like to point to two specific examples where elements of the above frame have been applied. Examples that stand out as specifically relevant in the context of Global Mobility organizations' reality.

IBM implemented design-led thinking into their operating model and experienced a dramatically faster and more efficient workflow, yielding a massive return on investment for IBM and for their clients. Teams doubled design and execution speed, profits from faster releases combined with reduced design, development, and maintenance costs. (ref. 'Total Economic Impact'™ of IBM's Design Thinking Practice – a Forrester Total Economic Impact (TM) Study Commissioned By IBM, Feb 2018). What the IBM example also points to is how the design-led approach resembles lean in its achievements. I.e. where lean is highly efficient approach when a solution has been developed then design-led thinking is highly efficient in continuous innovating customer-oriented solutions.

People & Organisation (HR) at Wood (ref. 2020 Exceptional Execution Project, 2020) applied lean management to leverage more from its Mobility Shared Services (MSS). Through the lean project the organization saved more than 599 days of work for the Mobility Advisors by increased service efficiency and transiting of tasks to the MSS team; the MSS team itself saved 331 days of work. Through Lean Management the Mobility Advisors increased resources for improving and developing their operating model in areas such as strategic business partnering, talent mobility, communication & engagement, and inclusion & diversity.

In the following article lean management and agile process is further explained and applied to a concrete example with high relevance for the global mobility functions.

The principles of Lean thinking

Even if you are not familiar with Lean, you may have heard about its origins. It is important to understand that Lean Management ideas originate in production. More specifically, the concept goes back to the late 1980s, comparing Toyota's production systems to traditional mass car manufacturers. And while the word Lean may imply that the core idea is to reduce costs, this approach would be oversimplifying the concept. Lean needs less (human) effort to design products and services. Lean requires lower investment and uses less material in general. And Lean creates products and services with fewer defects, while also causing fewer employee injuries. This normally results in lower cost, as well as a higher customer satisfaction. Successfully transferred to GM and its processes, there is great potential to overcome the damage COVID-19 has caused and produce a future-ready delivery model.

In essence, Lean is a five-step process that is continuously applied.

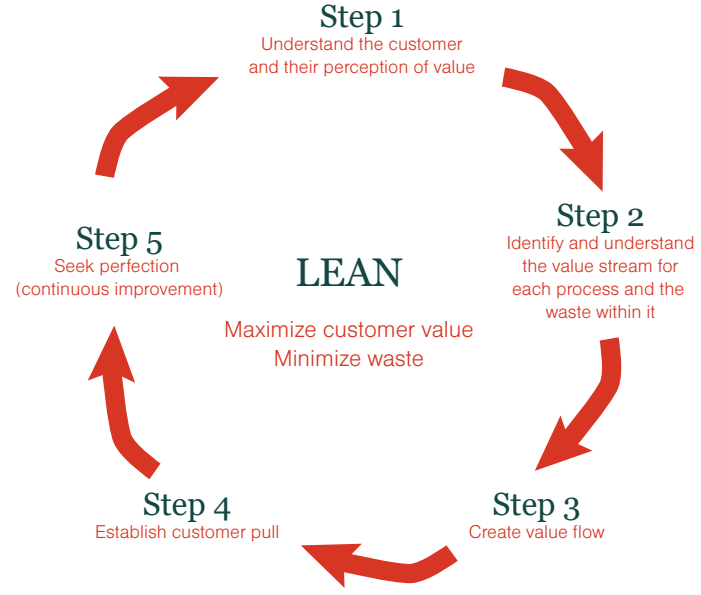


Figure 1: Five steps of Lean

When starting your Lean journey, it is important to include the stakeholders who bring individual value, to support identifying this clearly. In addition, upfront alignment on the purpose and key principles will ensure you gain momentum and advocacy on making changes once these opportunities are identified.

The principles of Lean thinking

Lean approaches start with the identification of value. This happens from a customer perspective, i.e., it is essential to understand that valuable is only what the customer perceives as value. In an outward-facing process, this means an external customer is willing to pay (good) money for it. When applied internally, the “customer” is the organizational entity that benefits from the goods or services. A common misconception is that Lean is about “cutting down” and trimming costs. While reducing (avoidable) cost is an important part of Lean thinking, this is rather pointless if the whole operation does not add value, as identified in step 1.

When the value is identified, organizations must also identify and understand the value stream, as per step 2. Therefore, each part of the process is analyzed and scrutinized. A key element here is to identify waste within the process. In manufacturing this is taken literally, whereas in a service process, waste is anything that uses resources (including time) during the process but does not contribute actual value. For instance, unnecessary or redundant steps within the selection process of an international assignee could be considered waste.

In step 3, we create the value flow by eliminating waste and ensuring the whole process is executed smoothly and in the most efficient manner. Step 4 reflects again on the customer perspective.

In Lean methodology, the customer is the most important stakeholder and delivering value to the customer has highest priority.

Therefore, at this stage we must listen to the customer, then react and develop processes that serve customer needs and create value. In other words, the process is only successful if it actually delivers the value identified in step 1 to the customer. Finally, step 5 is to seek perfection. Obviously, no process will ever be truly perfect. We are only human, after all. Yet, we should seek perfection and, with each iteration in the cycle, ask ourselves: what is the perceived value (and has this, perhaps, changed over time) and what waste are we producing that makes our process less efficient and/or more costly.

Applying changes to your processes and learning from these key change management principles will help take your key stakeholder group with you on a positive and aligned journey. Sharing the vision of your project, providing information that outlines the ‘why’ and ‘how’ of specific change initiatives, as well as engaging them in the potential for improvements, by giving them the opportunity to collaborate, is important – it increases the chances of success and buy-in. We argue that these fundamental Lean principles are applicable in Global Mobility in general and the assignment process in particular.

10 working questions to the 5 steps in Global Mobility

1 Understand the GM customer and their perceptions of value

- Who are the key customers (such as global workers, line managers, talent managers, GM service vendors, senior managers, external stakeholders)?
- What do they value? Why do they value it?

2 Identify and understand the GM value stream for each process (incl. sub-processes)

- What are the key aims/deliverables of a particular process and how are these delivered by the GM department?
- What other GM customers are involved and how can interfaces be coordinated?

3 Create GM value flow

- What are the barriers and obstacles currently in place? Where are the bottlenecks?
- What are the known unknowns (unpredictable/complex/ambiguous elements in the value flow)? What sort of scenario planning/risk management is needed?

4 Establish GM customer pull

- How can the value proposition for the customer (identified in Point 1) be communicated and updated dynamically to the different groups?
- What are the priorities when stakeholder interests clash? How can tensions be navigated?

5 Seek perfection

- How can GM processes/approaches be monitored and reviewed? What KPIs are relevant?
- How can GM processes be improved? What change management interventions are needed to make adjustments?

II Thinking in processes

It is no surprise that all the experts we spoke to emphasize the importance of “thinking in processes”. To help with process orientation, we introduce the concept of DMAIC to our paper.

It can provide the process behind the idea of Lean thinking. For example, for an international assignment from selection to repatriation. In the Define phase, we describe the process and define improvements. When done, it is essential to consider measurable factors (e.g., days to complete sub-processes, resources involved, cost occurring).

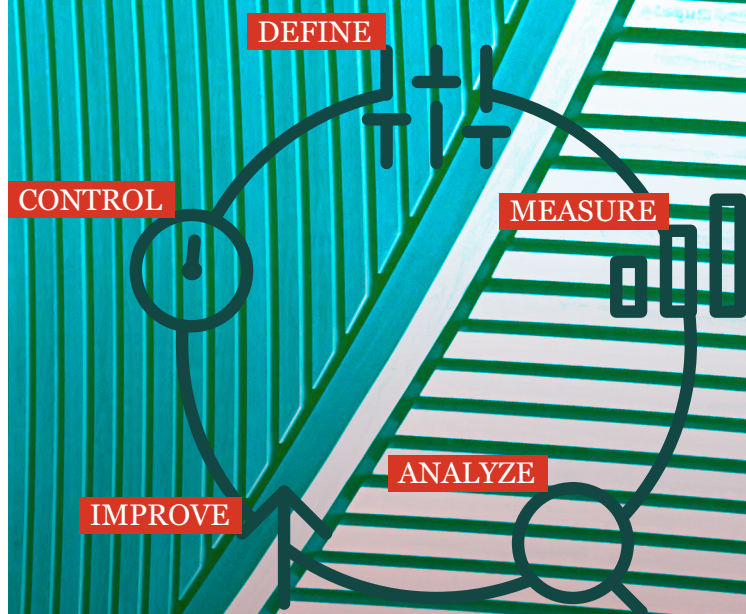
Use facts and data to understand how your processes work!

Only then is it possible to identify waste and make improvements to your processes.

In the Analyze phase, we use our collected data to determine the root causes of problems that limit performance in each process. Once the problems are clear, in the Improve phase, we identify potential solutions and select the most promising ones. There may be several possible solutions making it difficult to choose the right one. However, do not be limited by this. In fact, the final phase, Control, will reveal how well (or not so well) you have done.

Do not worry if the result is not perfect. It is a cycle and you are meant to start over again. Each new iteration will benefit from you having more information and better knowledge. As we wrote before, it is all about continuously improving and striving for perfection. Each stage is a chance to learn. While this may sound trivial, we encourage you to follow this logic and document your iterations.

We are sure that you will find genuine improvement, sooner rather than later.



An international assignment as a process

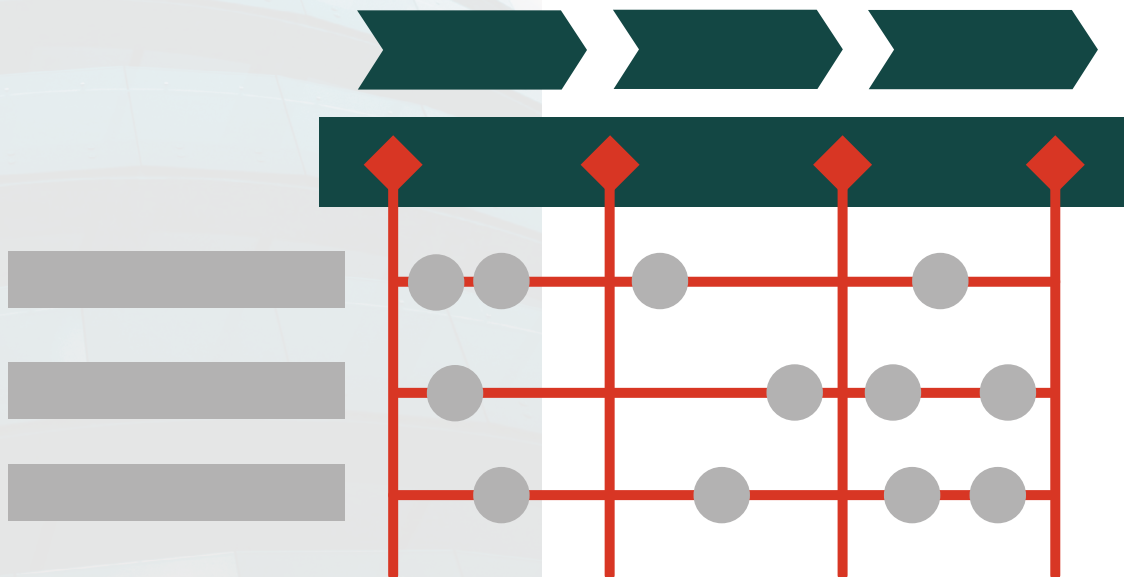


With the Lean thinking in mind, we turn to action. Over the following pages, we model a typical long-term international assignment process. We define the milestones and outline certain issues that we believe are applicable to any organization.

This process may look different for your organization. More importantly, it will likely be more fine-grained, because this is an adaptation of your individual needs. For the purpose of this paper, we are using general terms, to provide you with a blueprint.

This is informed by in-depth interviews with experienced Lean consultants covering a variety of industries. Their guidance helped us strip the process down to a clear starting point. From this your organization can kick-off your own Lean management in Global Mobility.

Figure 2: General process roadmap



The first step to a Lean assignment process is mapping the sub-processes and phases of the assignment using a process roadmap. This is a standard tool, as seen in Figure 2. This simplified illustration uses a flow chart supplemented by a matrix structure. The arrows indicate key phases of the project, while the grey boxes to the left show sub-processes. The red diamonds are milestones and the grey circles are cornerstones. By visually clustering each section together, you get an overview of what needs to be done (and finished) by when, along with visibility of the entire process.

Let us illustrate our argument by using an example. We selected a long-term assignment process (see Figure 3) after the strategic objectives and business case for the assignment were agreed. Such a typical, long-term international assignment normally starts with candidate selection, followed by the pre-departure phase. Depending on timing demands, this phase can be shorter or longer and fewer or more steps are necessary. The actual assignment phase starts once the candidate is abroad – normally longer than the other phases. Finally, to manage the return home (or, less typically, a move to another country), we depict the repatriation phase.

The diamonds in Figure 2 define the milestones. Although the number can vary, we recommend around one to two milestones per phase, to avoid loss of focus. A milestone should signal either the transition from one phase to another or an exceptional event within the phase.

In our example, milestone #1 would indicate that the selection is complete, i.e., we have identified a candidate. Milestone #2 indicates that all formal issues are complete, and the relocation can take place (e.g., work permission and visa (if applicable) granted). Milestone #3 depicts completion of the relocation, i.e., the assignee has arrived in the host country. Finally, milestone #4 triggers preparations for repatriation. From this point, all formal and informal issues around repatriation must be clarified. Then, with milestone #5, the assignee relocates back to their home country. Finally, milestone #6 concludes the process with the (then former) assignee being fully integrated in their home country.

Having defined the phases and the key points of each phase, we look at the partial or sub-processes. This stage depends on your organizational structures. Naturally, in some cases there will be more or fewer sub-processes. In any event, the first sub-process should be the customer process. Getting back to our initial Lean thinking, the customer here is the assignee. Eventually, the process is designed around and for the individual to go abroad and it is our understanding that they are the key customer. In this regard, customer process covers all points of direct interaction with the assignee.

This is defined in the cornerstones, which describe the end of an activity and include detailed descriptions about pre-requisites, tasks to be completed, and tangible criteria to measure success. As you can see from the color coding, each cornerstone is also attached to a unit that bears the responsibility. Again, our selection may differ from your organization, but the logic remains. For instance, the first green dot in the customer process indicates a cornerstone for which the line management in the host country is responsible. This could be agreement between the assignee and the host country line management about the role and any expectations. Success criteria would be, for instance, assignment objectives signed by all parties.

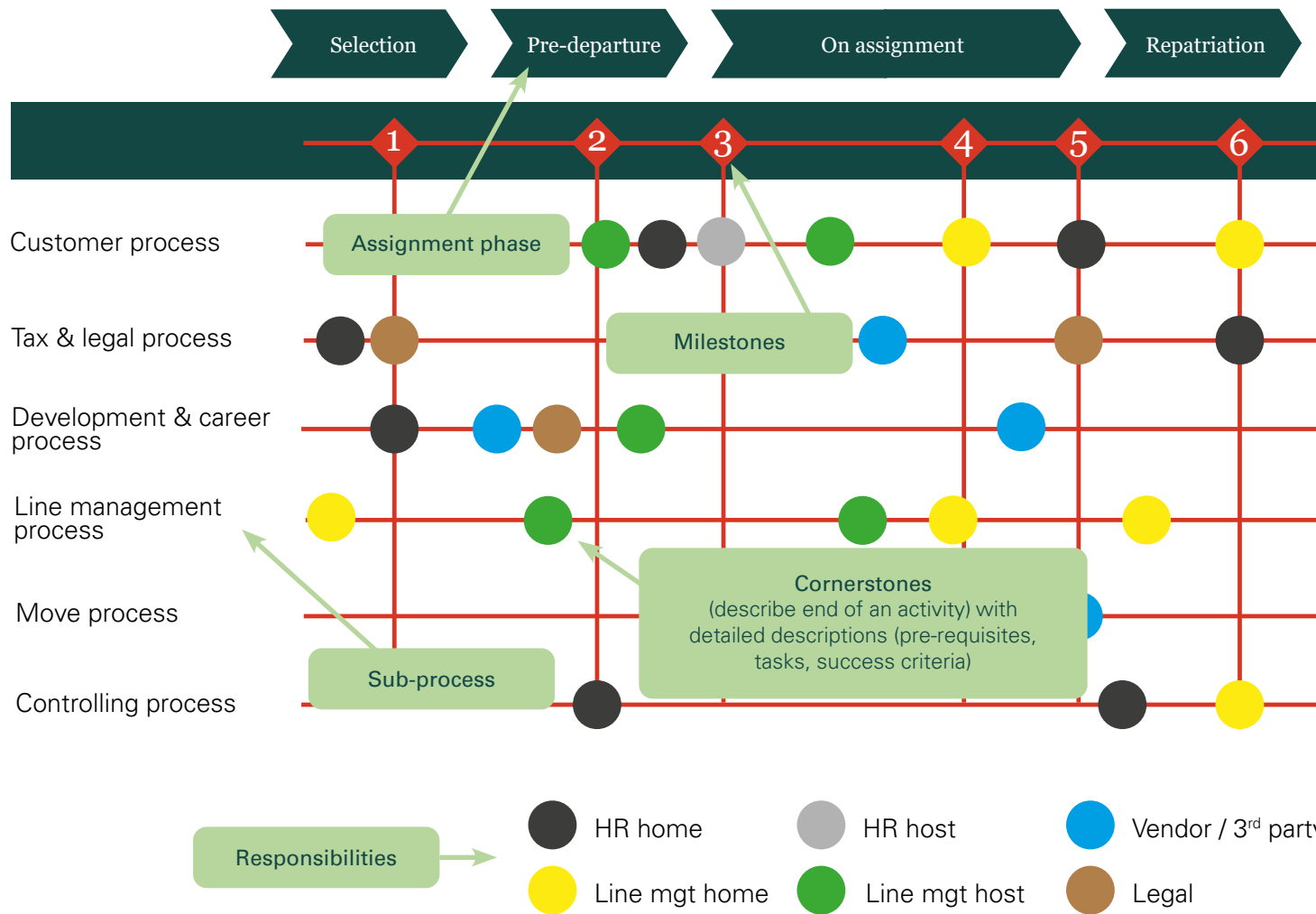
If you stopped here and thought “wait a minute, this isn’t true for us” you have actually started mapping your process already!

At this point, you may notice that this is fundamentally different in your organization. This is not surprising. Essentially, completing this chart for your organization is nothing else but the (visual) result of your Lean thinking and DMA-IC. In other words, if you stopped here and thought “wait a minute, this is not true for us” you have actually started mapping your own process already!

Coming back to our example, we included tax and legal processes (dealing with compliance and regulatory issues), development and career processes (ensuring a proper training and developmental experience that fits into longer term career plans), the line management process (covering everything around the actual day-to-day work), the move process (physical relocation), and a controlling process designed to monitor the sub-processes across all phases. This process is key to measure overall success and will be useful for your own Lean iterations.

Remember, the ultimate goal is perfection in the GM process!

An international assignment as a process



Process roadmap

- Focus on most important activities in Lean process management
- Definition of ideal process (how does the process look in an ideal world)
- Clear definition of tasks, competencies and responsibilities



Improving the process flow

The goal of this report is to help you get Lean thinking into your Global Mobility processes. Therefore, we would like to get back to the initial quote by Jack Welch. The ultimate competitive advantage comes from an organization's ability to learn and to translate the learning into action rapidly.

A well-organized, Lean process relies on avoiding redundancy and is designed to fit all pieces together - nicely and in sequence

Applying this to the assignment process, we draw your attention to Eli Goldratt's Theory of Constraints. A constraint, in this logic, is defined as a bottleneck, and occurs when and where capacity cannot meet demand. Possible constraints include: people not delivering as expected; a backlog in the process (e.g., visa not ready); or virtually anything else that prevents a cornerstone (or milestone) being completed as planned.

Clear definition of tasks, competencies (needed and available), and responsibilities helps identify and overcome constraints. A well-organized, Lean process relies on avoiding redundancy and is designed to fit all pieces together - nicely and in sequence. A constraint early in the process may have an impact (and delay) on later stages of the process. Therefore, when implementing Lean thinking to your global mobility process, make sure to account for constraints appropriately.

V Your Lean process

Applying Lean in the automotive industry – and, subsequently in many other industries, including outside of production functions – has led to a revolution in management approaches. COVID-19 and the volatile situation it created, as well as relentless cost pressures in GM, has meant that the industry is facing challenges like never before.

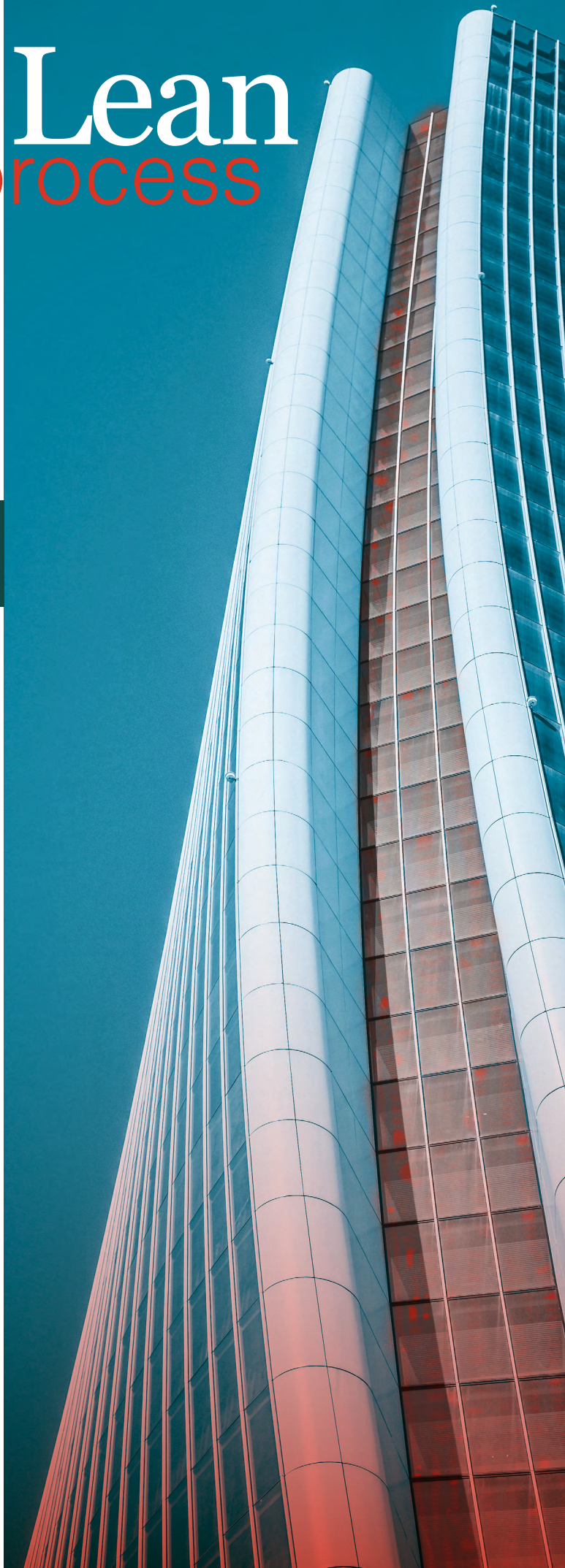
There is no better time to analyze these challenges and opportunities through the lens of Lean.

Many organisations are currently undergoing radical changes through digital or structural transformation programs. These have frequently been accelerated due to business shifts driven by pandemic impact. Lean presents an additional opportunity to assess value at the centre of GM, within these change programs. It's also an ideal time to take advantage of new efficiencies linked to digital capabilities, process streamlining or connectivity, and/or data visibility. Equally, GM teams should consider their internal capability-set to identify missing skills or competencies that could help deliver a more efficient and better service to their customer, alongside these organisational changes. In fact, more companies are starting to recognise their internal stakeholders (such as, e.g., international assignees) as customers. Collectively, these improvements allow GM to elevate delivery and increase value to their organizations by enabling more time and resources to be focused on adding strategic value. Thus, issues such as the rapid evolution of technology, digital instrument and new ways (and locations) of global working can be enhanced by employing Lean principles and concentrating on GM processes.

This report is intended to give you an initial overview of Lean thinking in Global Mobility. As emphasized, although some core steps may be universally applicable, the real strength of Lean only unfolds when applied to real-world scenarios. Nevertheless, we have outlined five principle steps and ten key questions to help you introduce Lean to your organization.

On the following page, we provide you with a template of this process. In addition, this report contains a case study from Wood that highlights some of the principles and action areas discussed above.

The RES Forum is happy to accompany any organization on their Lean journey, through workshops, events and further research projects.





Your Lean process



Case Study

I'd like to thank Sarah White from Wood for her contribution to this paper. This case study helped shape our thinking on how Lean and Agile can be applied to GM. On top of that, it offers our readers a great example of how to introduce Lean and Agile into their own organisation. Thank you.

David Enser

2020 Exceptional Execution Project

Following a successful strategic review and to align with the People & Organisation (HR) operating model, we identified a number of areas that the Mobility function could target to leverage more from its shared services team and delivery efficiency to our business and our clients.

Key Themes & Work Streams

One of the overall aims was to create a more agile team, whereby the transactional work would be transitioned to our Mobility Shared Services (MSS) Team, in turn freeing up the wider Mobility team to partner with the business in a more proactive way, enabling us to deliver at pace and spend more time on the value-add activities.

With no additional headcount or investment, an Exceptional Execution Mobility Project Team was formed to identify common themes and areas of improvement. This was then implemented through maximising the use of existing technology and skillset from within the team. The project was also delivered during a year of uncertainty, producing transformational results for the Mobility Team at Wood.

Key questions were asked at the review stage, when looking at the entire end-to-end process:

1. Can we standardise?
2. Can we optimise and do it better?
3. Are we able to automate?

wood.

The below workstreams were identified:

Process Improvements

Mobility

Terms and Conditions

Wood has a flexible approach to the application of terms and conditions, to prepare project specific conditions to support us winning work and meeting our clients' needs.

Prior to applying the process improvements identified, it took the team around 3 to 5 days to prepare the terms and conditions. The old process encompassed the advisory team reaching out to vendors directly, using online data sources to prepare the terms and conditions, which was time consuming and of a very transactional nature. The project team identified the document could be automated by importing raw data and embedding macros/formulas into the document. To achieve this, the team partnered with our vendors to receive the data required and imported it into the terms and conditions template. Formulas were added to ensure that the data did not need to be manipulated by the team, ensuring greater accuracy and standardisation globally.

Implementing these changes reduced the time taken to produce the project terms and conditions to 5 minutes. By simply entering location information, this not only freed up the Mobility Advisors' time, but also enabled response to the business teams to be quicker and more consistent.

Letter Templates

On review Wood had over 150 different letter templates – most of which had similar content, so we decided to rationalise and managed to reduce to a core set of 34 letters which were fit for all projects.

A final step was exploring if our system had automation capability to create the letters at the click of a button in the workflow, and it did! Only the key information was required to prepare the standard letters and due to the new automated process it enabled the process to be tracked, removed duplication, human error, and saved time through not having to carry out an audit; in total we saved 85 days.

Forms

We had numerous forms capturing similar information, shared with multiple stakeholders, often resulting in duplicate/repetitive information being provided. In reviewing the content of these forms, we created a project guidelines pack, removing all duplicate and unnecessary fields and retaining only the core information required to understand the project and to mobilise an employee.

The outcome of this is that it now takes P&O (HR) less than 10 minutes to complete the form. We further automated the mobilisation form so that our MSS team can upload the file with the assignment record created automatically and the information imported to our Mobility system within minutes.

Overall Mobility Process

As a team, we also reviewed the entire mobilisation process and questioned why we do things and if we still need to do them. We identified that many tasks that could sit within the MSS team. For example:

- Activating our vendors and reconciling the invoices
- Following up on passport expiry dates
- Sending out standard letters directly to employees
- Pre-assignment medical initiations
- Annual family status verification process

Systems

Meetings with our technology vendor were held to understand what parts of the system we were underutilising and how we could get more from the system at no additional cost. As well as automating letter templates we identified additional automation in processes including pre-assignment medical initiations, social security certificates and posted workers directive applications.

Automation reduced duplicate data entry and error and provided data governance in protecting an employee's personal data as the information flows directly from the system.

Mobility Shared Services

Whilst the primary focus was improving Mobility processes the MSS team required help in reviewing their activities and understanding what more they could do to support. We also identified that to enable an 'exceptional excellence' partnership both teams needed to have a greater understanding of what each other did and why, and where touch and handover points existed.

Although the MSS team are good at delivering transactional tasks, we focused on questioning why things were done in a particular way; to highlight duplication or potential wasted effort; and to identify what skills they required, to ensure we deliver our collective goals.

A good example of this was the way the team audited the work performed:

Audits

Our main observations when reviewing the MSS team audit processes were:

- That it took them longer to audit the work than the time it took to originally produce it.
- Errors identified were less than 0.5% as they were not routinely being picked up despite the audit activity.
- Every detail was audited irrespective of how critical the information was.
- The same data was being audited at every stage of the process, but original errors were not being identified.

The outcome of the review was to:

- Concentrate on reducing the time taken to perform the audit, review the critical data set to audit and simplify the process.
- Automate most of the letters and mobilisation forms resulting in a significant decrease in manual audits performed by the team.
- Identify and map all items to be audited, ensuring we removed any duplication and focused on value-add items with a cost or compliance impact.
- Simplify the performance score reporting by implementing a clear reporting process managing end user issues after the event and use this as a focus for future training.

This activity reduced the audit checklists from eleven to seven.

Analytics/Reporting

The MSS team were compiling many reports on a weekly and monthly basis that were no longer required or, due to duplication, could be merged. We set up reporting templates in the system enabling us to create reports in real time, when required. This effort saved 12 days per annum in reporting.

Training sessions were held with both teams to ensure they understood the importance of data integrity. Due to the increase in automation, it was critical for the teams to understand that the quality of the output from the automated processes were dependent on the accuracy of the data inputted into the system.

Engagement

A monthly call was set up across all the regional Mobility Advisors to discuss and share any operational issues or best practices in their region. Training sessions were also held with the Mobility and MSS teams to enhance understanding of the rationale behind processes or required information to drive efficiency and client service.

We also embedded an MSS team member into the advisory team for development, support, and learning. This enabled a shared understanding and the ability to tap into additional resources if mobility volumes increased substantially.

An ideas log was also introduced for both teams to share their ideas on how we can improve to keep them engaged and promote continuous improvement.

Conclusion

In total the project has saved more than 599 days of work for the Mobility Advisors due to the automation of services and transiting of tasks to the MSS team; the MSS team has saved 331 days of work and accepted an additional 43 days of work from the Advisor team.

Mobility Advisors now have the time to focus on strategic business partnering, talent mobility, communication & engagement, and inclusion & diversity initiatives as they are freed from administration and transactional tasks. The MSS team continues to develop skillsets and identify other improvement opportunities to add value to our business and our clients.