Navigating Mobility Policy Design

Managing Change

The Navigating Mobility Policy Design series (*Case Studies of Policy Change* and *Aligning Relocation Policy Structure with Mobility Strategy*) has focused on the many options organizations have when structuring mobility support. Throughout this final document in the series, we will highlight key steps to navigating and managing policy change.

Below are a few key points to consider when beginning the process of managing policy change.

- **Few companies are making the same changes at the same time.** Different organizations are making different changes at different times. Those changes are being made based on what organizations believe is best for their business. Organizations each have their own objectives, cultures, and values that impact their need for policy change. For every company adding or enhancing a benefit, there may be another company doing the opposite. A change that one organization is making today may not be made in another organization for several years to come. Most trends are very broad and develop over years. For example, even with 2022's relentless inflation and interest rate hikes that are expected to continue through 2023, reaction and change is minimal. Many organizations that have been considering adding points or subsidies held off and took a "wait and see" approach, and most still haven't made a change.

- **Change comes in all shapes and sizes.** The principals outlined in this document are meant to provide general guidelines to assist with managing change, small or large.

- **Different organizations manage change in different ways.** What may be considered a relatively simple change in one organization may require a tremendous amount of effort in another. Some organizations may be able to implement change based on a belief or general conclusion, while others may require supporting data, scenarios, forecasting, or formal presentations.

Although there may be differences in how organizations manage change, there are some general steps that can be followed to effect change. Below, we will walk through the key steps.

Steps for Successfully Managing Change to Mobility Policies

1. Determine the Objective(s) for Change

To begin the change management process, it is important to determine the objectives for making change.

Have a clear understanding of the current mobility program. To avoid proposing changes impulsively, it is important to first have a complete and clear understanding of the current state of the mobility program. Data on the most utilized services and expenses, total spend, satisfaction levels, other key data points and factors all play a role in determining the current state of the mobility program.

Change is often introduced to make a program more competitive or to better align with best practices. Understanding how the program compares to other organizations' programs is often necessary when considering change. Survey and benchmarking data can be very supportive.

Ask why change is needed & define objectives. Determining the reasons for change helps create well-defined objectives. Why is change needed and what are the goals? Some companies are enhancing and expanding their mobility policies to provide more support or to attract talent, while others are restructuring, consolidating, or limiting support. Some are simplifying their policies to gain administrative efficiencies, while others are adding tiers, calculating variable allowances, or building scenario-based mobility packages (which may add administrative processes, forms, and overall communication). Companies are making change for their own reasons. The changes that are made can vary greatly between organizations, even those with the same objectives. Trying to achieve multiple objectives often can further complicate the process.

Common Reasons for Change

To reduce costs

To enhance the employee experience

To simplify the program

To be more competitive

To be more flexible

To be more inclusive

2. Define Changes to Support Objectives

An organization may be able to explain why change is needed, but they may not know which change would best support their objectives. This step of mobility policy change management centers around discovery.

Explore options and possible outcomes. During exploration and discovery, possible changes and their potential impacts should be considered. Rely on Global Mobility experts to provide guidance and relevant information during this process. It is important to identify changes that are most likely to support objectives. Not all desired changes may be implemented, so its best to know which changes may have the biggest impact toward meeting objectives.

Determine change requirements and processes. Some small changes may be implemented with little effort, while major changes may require approval from various leaders in the organization. When considering possible changes, identify the types of approvals that may be required and plan accordingly.

3. Identify Change Ambassadors and Decision Makers

Know the key roles in the change management process. A change champion is the person or people driving the desired change. A change ambassador is the person or people the champion relies on to help communicate and support the change. A decision maker is the person or people with ultimate authority to approve change. While the actual titles these people have will vary by organization, the key role each plays is similar to the above description, and in some cases more than one key role may be played by the same person.

Some changes may require the approval of a steering committee or executive leadership. Change champions must be able to effectively communicate the proposed changes to their ambassadors, who can support the case for change to those ultimately granting approval.

4. Organize Case for Change

Know the target audience. To gain support for all the objectives, it is important to prepare information tailored to the specific audience. Ambassadors often provide guidance and assist with editing and fine-tuning details before bringing the plan to the decision makers.

Organize and present relevant details to support the case for change. Information is often presented with supporting documentation as needed. This step in the process is the culmination of all the objectives, exploration, supporting data, and the proposed changes and their impacts.

To determine the appropriate level of detail required for the presentation, consider the complexity of the proposed change and the target audience. No matter the complexity or audience, it is important to present the proposed changes in a clear, positive, and strategic manner in support of the objectives.

Consider the impact from all angles. When major change is being made, it is essential to understand the internal impact. For larger changes, consider the possible impact on Talent Acquisition, Compensation, Benefits, Tax, IT, and any other groups that touch the employee mobility process, as well as the resources it will take to communicate, train, and implement the change.

5. Implement Change

Create a timeline. It's important to set goals and milestones to track the changes being made. Have realistic expectations based on the potential impacts from all angles (i.e., all individuals, departments, and third parties involved).

Communicate, communicate, communicate. Make sure necessary details are provided to all that touch the mobility process and are impacted by the change. This can be accomplished by conducting weekly status calls, sending email updates, and communicating the completed milestones of the implementation timeline.

6. Monitor the Change's Impact

It is best to have a plan for gauging the success of the change. It is also best to remember that change may take some time to show results.

Identify how the impact can be measured. Know what metrics are available to assist with identifying how successful the change has been. This will be driven by the original objectives for change and often includes staying abreast of service utilization, spend, employee sentiment, internal administrative processes and efficiencies, and other areas of concern.

Celebrate wins. Have the changes made a measurable, positive impact on the mobility program and accomplished the objectives? If so, communicate how well the change has supported the objectives. Determine the best way to communicate the wins.

Investigate miscalculations. Have the changes fallen short of the desired outcome? If this is the case, determine whether enough time has passed to ascertain success or failure. If a positive impact has not been fully realized, consider other internal and external factors that may have impacted the mobility program.

When new objectives arise, consider more change. This takes us back to Step 1 of the change management process.

Conclusion

Different organizations will manage policy change in different ways. The steps which have been outlined are provided as general guidelines for anyone considering making significant changes to their employee mobility program.