

Moving The CEO – How To Relocate The Most Senior Executives Successfully

I can remember being called to the Global Head of HR's office to discuss a confidential project and being advised I had been given the task of relocating the organisations new CEO. My initial reaction was excitement at being trusted with such a prestigious project. However, I was also thinking to myself, this is very high risk for me personally if anything goes wrong!

Moving the most senior executives puts the global mobility team in the spotlight. Everybody involved in the transfer process has to deliver their respective tasks as effectively as possible and there is no margin for error.

Ensuring a positive transfer experience is critical. Every detail, no matter how big or small has to be carefully thought through and managed. You have to be organised, responsive and agile, take ownership for tasks, and find solutions to any challenges that arise. Most importantly, you have to develop quality relationships that build trust and give the senior executive and their family confidence they are in safe hands.

This article highlights some of the key learnings from my experience relocating the CEO and other senior executives and may provide some useful insights to anyone else facing similar high profile moves.

The Senior Executive Mind-Set

Before I started to move C-suite executives I remember thinking it would be a fairly similar undertaking to that of a regular transfer. However, I quickly discovered that although they require the same logistical support, you have to go about delivering that support in a different way.

I have now had the opportunity to move a number of senior executives and I have observed that many share very similar qualities and characteristics. They have not made it to the top by accident. Their brains work that little bit quicker, they are incredibly driven, self-motivated, highly competent, exceptionally hard working, know exactly what they want, and are very effective strategic thinkers, always thinking several steps ahead. They also have an amazing

ability to absorb and retain information, determine what information is useful to them and what can be discarded.

I have also observed that if you present them with information on a particular subject whereby the solution could be open to interpretation (for example, international taxation), they often want a second opinion. Don't be offended if they do. This is just their way of gathering as much information as possible to help them determine if they are following the best course of action or if there is a more effective approach to reach their desired outcome. They usually end up going with the initial advice you provided but they like to double check.

Don't be a 'yes' person and agree with everything they say. They like to deal with someone who has their own views, opinions and can provide valuable insights to help them make good decisions. Although they may be more senior than you, you have more expertise in mobility so don't be afraid to share with them when it adds value. I recently helped a transferee save money on their house purchase sharing my knowledge and understanding of the nuances of the host location purchase process, and adopting a different negotiation strategy.

If you want the relocation process to go well you have to invest significantly more time and effort into the process and have excellent attention to detail. This is not because all senior executives are high maintenance individuals that make unreasonable demands. In most cases quite the contrary is true. The reality is, given their responsibilities and net worth, their lives are more complex. The consequences of getting anything wrong can have a much bigger impact. On this basis, one of my top tips would be to plan the tax and wealth management aspects of their move very carefully.

Individuals who operate at this level will keep you on your toes, but don't be phased by it, just be prepared, with good planning and organisation.

Building Trust & Credibility

Creating a positive first impression with the senior executive and their family is crucial when it comes to building their trust and confidence in your abilities. Prior to the first interaction, be prepared, be organised and make sure you

have done your homework. Understanding their specific situation so you can anticipate questions and provide solutions from the very first meeting is another top tip. Responding quickly to any follow up questions raised during the initial meeting, and the quality of your response is also very important. Trust and credibility are only earned through your performance and actions so make sure you deliver exactly what you have promised.

Effective Communication

Establish the protocol for effective communication from the start;

- Make it clear to them how the process will work, who will be contacting them and when
- Clearly define roles and who will be responsible for each aspect of their move
- Don't just manage their expectations, set them from the start
- Understand their preferred method of communication and be flexible to their requirements
- Understand how they like information to be communicated. Do they want all the detail or just the headlines?
- Be responsive and available
- Establish accurate timelines and stick to them. If you say you are going to deliver a piece of work by a particular date, deliver on that promise
- Have a fix it first approach. Things outside your immediate control may occur that threaten to derail your target process and timeline. Always have a plan B. It's how you fix it that counts
- Nobody likes surprises. Keep them updated and informed of what is going on at all times
- Be open, honest and transparent
- Be precise and accurate. They tend to be time poor so don't provide vague answers to their questions. They like the facts and for those facts to be presented in a clear and concise manner
- If you don't know the answer to a question, don't try and make up a vague response. That will annoy them. You will gain more respect by saying you don't know the answer but will find out for them as quickly as possible. Alternatively, connect them to the best person with the right expertise.

Understanding Their Needs

The most successful global mobility professionals are the ones that have a genuine interest in people, enjoy helping others and take pride in doing their job well.

They don't view the next relocation as just another transaction but want to deliver a great experience. They achieve this by handling the logistics well but also appreciating and being sensitive to the emotional side of moving.

Asking some simple questions can provide a very useful insight into how the senior executive and their family are feeling about the transfer and what is important to them.

You will find they have similar concerns to everyone else. Finding a great school for their children, a new home, ensuring the family are able to settle quickly and make new friends are all high on the priority list.

Once you have listened and have a good understanding of their requirements you can start delivering to those requirements and support both their logistical and emotional needs.

There is no margin for error

The Concierge Approach

Put yourself in the senior executive's shoes and walk through every step in the relocation process. Ask yourself whether they are only doing tasks that are critical to the process? Is there any duplication where they are providing the same information more than once? Are they spending time on administrative tasks when they could be focusing their attention on more productive duties that add value? Identify where the process can be simplified and the number of touch points streamlined to make the process easier to navigate. What kind of mobility experience do you want them to have? Did they find it easy? Did the process work well? Are they going to have positive things to say about the process and the HR/Mobility function or will the feedback be less complimentary?

I always adopt a concierge approach to manage the relocation of senior transfers. This involves taking a much more hands-on approach to ensure success. All aspects of the relocation process are managed via the concierge (me) to shield them from the complexity and administration of moving. Although having a one point of contact approach is nothing new – my concierge approach takes it to the next level by handling everything on the senior executive's behalf rather than just facilitating and co-ordinating

the relocation process. In practical terms my concierge approach includes;

- Attending all the relocation related meetings with the senior executive in person (home search, school search, tax briefings, immigration, banking and the delivery of the household goods shipment)
- Handling all the administrative items that arise on the senior executive's behalf (immigration applications, shipping paperwork, application forms for various host country services). All the senior executive has to do is review and sign where required
- Ensuring I am available at the times that fit the senior executive's schedule, including weekends and late evenings
- Acting as the one point of contact and filtering all communication and content between the different service providers and the senior executive. This ensures the senior executive only has to deal with me rather than multiple contacts and they only receive the critical information they require rather than having to sift through all the detail.

This concierge approach enables me to;

- Obtain immediate feedback from the senior executive and their family on how things are progressing and whether they are happy or not. If any issues arise or changes are required these can be dealt with immediately so little issues don't escalate into bigger issues, thus keeping their move on track
- Pick up any questions or work items immediately so there is less for the senior executive to action
- See how services are being delivered first hand and whether they are to the standard and quality I had initially specified
- Provide immediate feedback to the relocation partners on what went well, what didn't, and what could be enhanced and improved for the future.

Choose Your Relocation Partners Carefully

Although many relocation providers and third party providers deliver a great service, there are some that say they offer a VIP service for an additional fee but the delivery is less convincing. The VIP service tends to extend to them providing a senior point person in their organisation to deal with the senior executive but nothing else changes from a delivery or process perspective. The senior executive still has to deal with multiple contacts and deal with the administration themselves.

I suspect this is down to the fact that delivering great service is time consuming and some providers spread their resources thin to keep costs down despite high work volume. I also think some simply don't know what a VIP service should look like and what additional items they could be helping with to streamline the relocation process and enhance

the customer experience for the transferee.

Where it is necessary to have third party providers working directly with your senior executive, make sure they have a good understanding of your business culture and they are aligned to how you like to do things. It is essential that whoever is interacting with your senior executive has the right attitude and are customer focussed. Also make sure they are empowered to make decisions without having to go through lengthy approval processes.

Global Mobility Policy Framework

Make sure your mobility policy works for you rather than against you. It should be designed to help you not hinder or limit what you need to achieve. Create a policy framework that has the ability to operate a consistent policy approach but with the built-in flexibility that allows you to tailor the package to fit the specific requirements of each individual.

Final Thoughts

Moving the most senior executives can be a challenging and demanding experience but it can also be very rewarding, exciting and fun. If you focus on the key areas outlined in this article it will help you deliver a positive outcome for all stakeholders. The quicker the senior executive can settle in the new location without being distracted by personal or relocation related items, the quicker they will start delivering great results for your business.



MAX NEWBIGGING

Max Newbigging has over 17 years of global mobility experience gained from running in-house global mobility functions and consultancy roles.

Max has lived and worked in a number of international locations including London, New York and Hong Kong.

Max is Head of Global Mobility for the Old Mutual Group based in London and will be launching Discovery Global Mobility – the international mobility concierge in the summer of 2017.

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