Global mobility services
HR strategy discussion

Integrating global mobility and talent management
Applying data to get you there

Fremont, February 26, 2015
Bay Area Mobility Management
2015 Annual Conference
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Agenda

• HR Challenge/HR Opportunity
• Headwinds
• Talent Management Defined
• Talent Framework
• Data
• Case Study
• Talent Issues
  • Pre assignment
  • During assignment
  • Post assignment
• Wrap-up
With you today - Moderators

Suchitra Patri
Senior Manager
Global Mobility Services, KPMG LLP
Santa Clara, CA

Joseph Pernaselli, GPHR
Senior Manager, Mobility Consulting Services
Global Mobility Services, KPMG LLP
Phoenix, AZ

Stacy Trujillo
Global Mobility & University Relations Programs Director
KLA-Tencor
San Jose, CA
Today’s continuing economic reality

- No more “Wait & See”
- Immediate needs and future needs
- Organizations are required to have the necessary talent and global mobility response.
- New and veteran organizations recognize this
The “big three challenges” for HR

- Balancing global and local
- Managing a flexible and virtual workforce
- Retaining the best talent
The “big three opportunities” for HR

The power to transform HR through technology

Data-driven HR

Seizing the opportunity to transform HR into a strategic player
Headwinds

- Talent initiatives and purview across a wider organization
- Talent Management still too “domestic”? Too “HQ”?
- Can talent models “translate” across borders?
- Impacts from other HR initiatives
- Global Mobility focus on logistics, execution
- Organizational structures facilitate or impede talent initiatives
Headwinds

- Keeping global assignees in line of sight
- Do talent management initiatives get diluted within global mobility?
- Global mobility is fast, can talent keep up?
- Self awareness
- Technological Support
Defining talent management

- A new way to describe “staffing”? “Talent Acquisition”?
- Is “Talent Development” as a component of “Talent Management”? “Talent Retention” tends to relate to monitoring and managing turnover and “churn”
- “Talent Engagement” may be a new way to define employee communications
- “Talent” may refer to skills or to employees themselves, but typically both.
Today’s talent environment

Challenges finding individuals with the right skills the business requires in these markets.

The disconnect can serve as a guideline for training and development needs.

Deploying skilled personnel to the specific markets

Peripheral programs – e.g., Leadership Development, High-Potentials

Investing in technology solutions to grow candidate pools, monitor and track performance, retention and plan for future staffing needs.
## Talent risk management

<table>
<thead>
<tr>
<th>Risks</th>
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</thead>
<tbody>
<tr>
<td>Potential damage to internal program credibility</td>
</tr>
<tr>
<td>Risk of failure during the assignment</td>
</tr>
<tr>
<td>Risks of underestimating “soft” skills and behavioral competencies</td>
</tr>
<tr>
<td>Failure to properly assess assignment performance and integrate host</td>
</tr>
<tr>
<td>performance within home performance management systems</td>
</tr>
<tr>
<td>Repatriation process</td>
</tr>
<tr>
<td>Risk of unprepared globally-experienced senior executive bench</td>
</tr>
<tr>
<td>Lack of a talent search process to hire international skills and experience</td>
</tr>
</tbody>
</table>
Leading trends in global mobility – Governance improved program execution

Greater internal collaboration between stakeholders

- Chief HRO
- Head of global rewards COE
  - Global comp
  - Global benefits
- Head global people & org development COE
  - Organizational
  - Development
  - Talent acquisition
- Heads of regional HR
  - Regional business partnering
- HR services
  - HR transaction services, Including mobility

KPMG predicts a trend of Mobility & Talent Management working much closer together

- Global Mobility
  - Global sales comp
  - Executive comp
  - Regional rewards leaders
- Talent Management
  - Learning & development

Corporate tax
Legal
F&A
Payroll

Defined assignment lifecycle roles, responsibilities and processes between GM and key stakeholder groups

Tax services
Mobility services
Immigration services
Talent Plan

Acquire & Place

– Sourcing Strategies, Old & New
– Internal or External
– Deploy or Train

Develop & Connect

– Will the assignment develop him/her
– Other training (new or missed)
– Keeping assignees part of “something bigger”

Engage & Retain

– Promoting interest in international assignments
– Promoting post-assignment career options
Governance & Infrastructure

Data
- Costs
- Analytics

Systems
- Talent
- Learning Management Systems

People
- Structures
- Roles

Process
- Talent review
- Model
- Governance
Data Costs

• **Financial**
  - Allowances
  - Relocation
  - Tax Environment
  - Compensation
  - Suppliers
  - Home country/host country
  - Exceptions

• **People costs**
  - Home country “gap”
  - Difficulty finding candidates
  - Post-repatriation separation
Data Analytics

- Platform to house and capture data
- Data purview/integrity
- Finding the story
- Trending
- External data
- Implications
  - Actions
  - Improvements
  - Communications
Next Steps/Considerations

- Continued development/refinement of Mobile Talent Portfolio dashboard—leveraging technology, improving data integrity
- Development of key operational metrics aligned with new/modified processes
- Alignment of individual performance metrics with new roles/accountabilities
- Setting appropriate targets to drive world-class performance
- Integration of global mobility metrics with broad talent management & workforce planning metrics
Mobility Management: Then and Now

Then
- Identifying & tracking the assignees
- Drafting a policy document
- Implementing a mobility process
- Deploying an assignment management system
- Reporting

Now
- Linking with talent management & business strategy
- Collecting all costs in order to manage costs and accruals
- Implementing process efficiencies/workflow management
- Integrating systems
- Data analytics
- Deploying portals & apps

Managing risk and compliance
Case Studies: Measuring ROI
Assignees by Level, Age, and Gender
## Attrition & Retention

<table>
<thead>
<tr>
<th>Home Level</th>
<th>Short Term Policy</th>
<th>Commuter Policy</th>
<th>Policy Type</th>
<th>Long Term Policy</th>
<th>Permanent Transfers</th>
<th>Grand Total</th>
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<tbody>
<tr>
<td>Associate</td>
<td>18.96%</td>
<td>0.05%</td>
<td>Host Based</td>
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<td>EVP</td>
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<td>Managing Officer</td>
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<tr>
<td>Principal</td>
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<td>0.00%</td>
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<td></td>
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<tr>
<td>Sr Associate</td>
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<td>0.00%</td>
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<td>1.22%</td>
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<tr>
<td>SVP</td>
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<tr>
<td>VP</td>
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### Years of Employment Range

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<tr>
<th>Policy Type</th>
<th>Less than 5 years</th>
<th>Between 5 and 10 years</th>
<th>Between 10 and 20 years</th>
<th>Greater than 20 years</th>
<th>Grand Total</th>
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<tr>
<td>Short Term</td>
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<td>19.60%</td>
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<td>0.56%</td>
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<td>Commuter</td>
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<td>0.48%</td>
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<td>0.24%</td>
<td>1.77%</td>
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<td>Localization</td>
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<td>Long Term</td>
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<tr>
<td>Permanent</td>
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<tr>
<td>Grand Total</td>
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### Termination of Employment Range Post Assignment

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<th>Home Level</th>
<th>Less than 1 year</th>
<th>Less than 2 1/2 years</th>
<th>Less than 5 years</th>
<th>Current Employee</th>
<th>Grand Total</th>
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<tbody>
<tr>
<td>Associate</td>
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<td>8.50%</td>
<td>0.24%</td>
<td>8.50%</td>
<td>27.18%</td>
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<tr>
<td>Sr Associate</td>
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<td>4.85%</td>
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<td>Officer</td>
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### Years of Employment Range

<table>
<thead>
<tr>
<th>Term Range</th>
<th>Less than 5 years</th>
<th>Between 5 and 10 years</th>
<th>Between 10 and 20 years</th>
<th>Greater than 20 years</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 1 year</td>
<td>10.49%</td>
<td>6.89%</td>
<td>0.33%</td>
<td>0.33%</td>
<td>18.03%</td>
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<tr>
<td>Less than 2 1/2 years</td>
<td>9.18%</td>
<td>3.93%</td>
<td>1.31%</td>
<td>0.00%</td>
<td>14.43%</td>
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<tr>
<td>Less than 5 years</td>
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<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.33%</td>
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<tr>
<td>Still EE</td>
<td>30.16%</td>
<td>19.34%</td>
<td>10.82%</td>
<td>6.89%</td>
<td>67.21%</td>
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<tr>
<td>Grand Total</td>
<td>50.16%</td>
<td>30.16%</td>
<td>12.46%</td>
<td>7.21%</td>
<td>100.00%</td>
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Defining ROI

Considerations:

- Relationship between years of service in the organization and attrition.
- How long between assignment end date and employment termination?
- What is the purpose of the assignment?
  - Is mobility an employer of choice initiative?
  - Is mobility used for resourcing?
  - Is mobility used for strategic purposes to develop skills or to develop a new market?
- How do you measure value added to the business?
- How does this compare with the non-assignee population?
Steps in measuring ROI

1. Identifying costs by policy, level, business unit
2. Understanding assignee demographics
   a. Level
   b. Gender
   c. Age
3. Reviewing attrition and retention trends
4. Integrating employee performance data
Talent Management within the Global Mobility Lifecycle

**Preassignment**
- There is an emphasis on the skills needed early in the process.
- There is influence from other related organization-wide talent programs.
- Aligns to performance management systems (home or host, or both).

**During Assignment**
- During the assignment (the active "At-Post" phase), there is a greater emphasis on proactive performance monitoring and communication real-time (with interventions as warranted), while planning for the "postassignment" talent needs of host (we look talent sourcing or via locating the assignee to host country employment status) and at home or at a new host country location (retention and succession).

**Postassignment**
- There are two key talent focus areas during the repatriation or "Postassignment" phase, with different audiences:
  1. At the assignee level, the organization has the ability, through active talent succession planning, to enable the assignee to reenter or redeploy to a suitable career-appropriate role.
  2. Further, the organization should strive to use successful assignments (and retain them) to promote global mobility as a career advancement opportunity, and to foster the realization that the business’s success is reliant on global talent sourcing and a mobile cross-border workforce.

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Pre-assignment Issues

- Headcount/Role’s Requirement/Business Case
- Skills Needed/Candidate Channels
- Communicating the need
- Candidate sourcing
- Selection
- Goals/Performance Management
Pre-assignment Actions

Workforce Planning

- Organizational Requirements
- Home/Host
- Short-term/Long-term

Talent Acquisition

- Host country - Internal/External

Talent Engagement
Pre-assignment Actions

Recruiting – External/Internal
- Finding skills and interest with technology
- Levels of interest in the organization

Assessment and Development
- Not only skills & competencies but also career path
- Training to address skills/experience gaps
During Assignment Issues

- Launch of the assignment
- Monitoring/intervening
- Home country communications/connections
- Repatriation Planning
- Local hires
- Localization
- Sequential assignment
During Assignment Actions

**Deployment**
- Program infrastructure
- Appropriate, relevant, impactful

**Retention**
- Preventing failures
- Promoting repatriation

**Engagement**
- Promoting assignment success
- Home country changes and developments
During Assignment Actions

**Acquisition**
- Host country candidate replacement pipelines
- Other internal candidates

**Retention**
- Localization
- Succession
- Leadership development
- Internal placement

**Talent Development**
- Local hire training & development
Post-assignment Issues & Actions

Issues
- Promoting international assignments to organization
- Re-entry support and training

Actions
- Talent Engagement
  - Foster a greater global mindset
  - Re-assimilation
- Talent Retention
  - Skills and experience to new home country role
Moving forward

- Does the organization have a holistic strategy that articulates the interdependence of Talent Management and Global Mobility?
- How does global mobility integrate into each aspect of the Talent Management processes and execution?
- Is there executive support and ownership driving the governance surrounding international assignments?
- Have technical and financial capabilities been built to support the measurement of global talent management?
- How can the story be captured with key metrics to communicate the story to key organizational stakeholders?
- How does the organization monitor and respond to talent and global mobility changes over longer time horizons?
Questions