

relocation benchmark report.

prepared exclusively for the
PHARMACEUTICAL INDUSTRY



July 2016

Proprietary & Confidential
July 2016

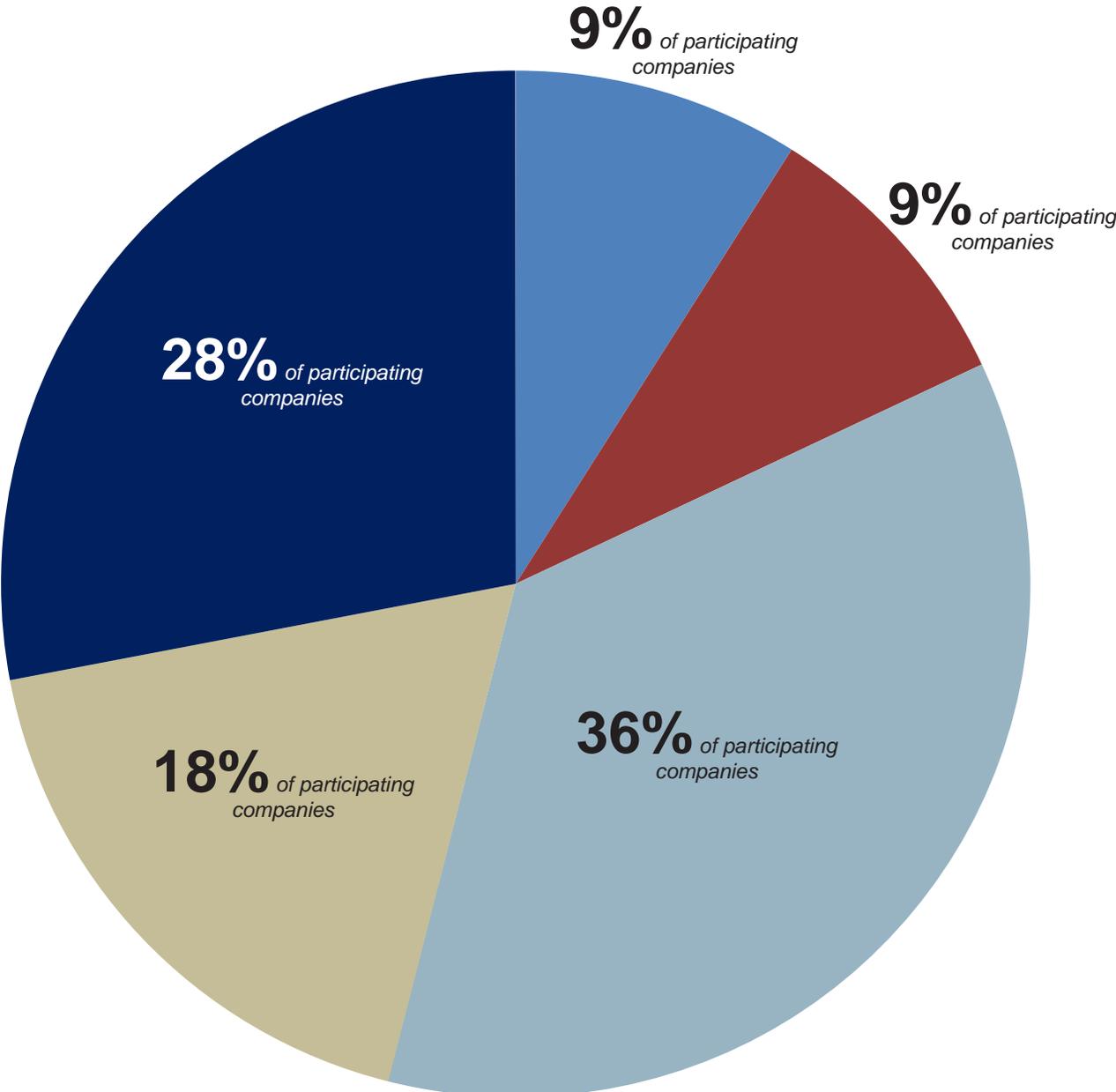
11 companies similar in scope within the pharmaceutical industry.

Over 20 years ago, WHR Group Inc. was founded to fill a gap that existed in our industry—of relocation companies dedicated to only low cost and not service, or companies dedicated to only high service (meaning high cost). We exist to blend high service *with* affordability.

We benchmarked 11 pharmaceutical companies, ranging from fewer than 10,000 employees to over 100,000 globally. Employee size did not directly translate into policy richness, i.e. the larger pharmaceutical companies do not necessarily offer more benefits. Some companies exhibited significantly less risk aversion while others remained decidedly economical.

Company names have been randomized and assigned a generic title to maintain confidentiality, e.g. Company A, Company B, Company C.

The following pages will call out the obvious trends for each of the major benefits surveyed.



Number of Employees

- 1,000 - 10,000
- 10,001 - 20,000
- 20,001 - 50,000
- 50,001 - 100,000
- 100,000+

detailed
benefits
analysis.



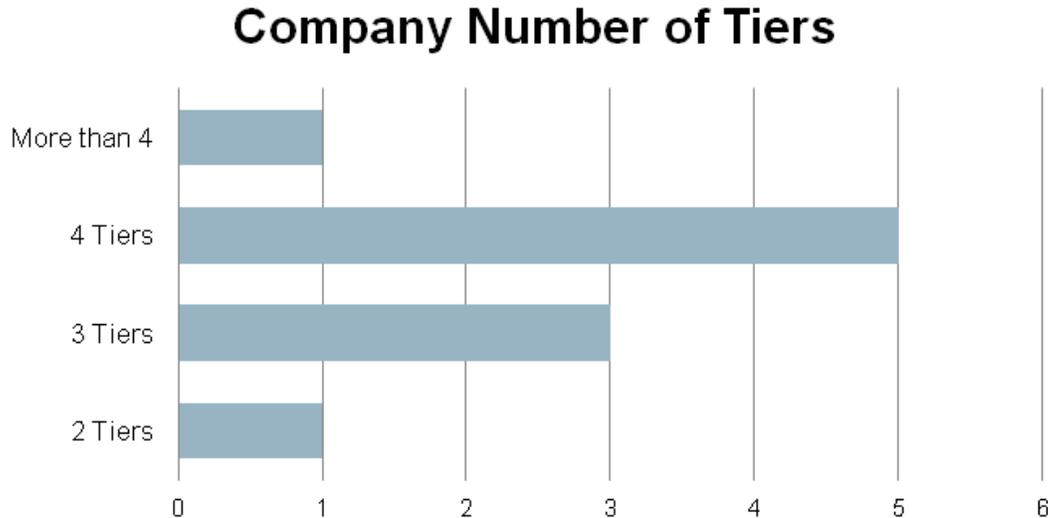
tiered policy structure.

All but 1 company base tiers on employee role (Manager, Director, Executive, etc). The exception lies within the Manager tier and the urgency to fill the role.

In addition, 6 of the 11 participating companies (55%) differentiate tiers between homeowners and renters, and 5 (45%) differentiate between new hires and existing transfers. Several companies break down these tier structures even further.

A deeper dive into the data collected:

- 100% of respondents use a tiered approach (versus an “a la carte” or “points based” approach)
- The maximum number of tiers offered is 6
- The minimum number of tiers offered is 2
- The most common and average number of tiers is 4



home sale listings.

All companies' home sale policies begin with the completion of 2 BMAs, with the listing parameter set at 105% of the average.

A deeper dive into the data collected:

- Most (80%) require BMAs to be within 5%, with 1 company allowing up to 10% variance. Another states flexibility on the variance and overall listing price for the first 30 days.
- Most (73%) average the 2 closest BMAs when a third is needed
- 2 (18%) average the 2 highest values, and 1 uses the higher of the 2 values between averaging all 3 of the 2 closest values

home sale buyouts.

Only 1 company does *not* offer GBO home sales.

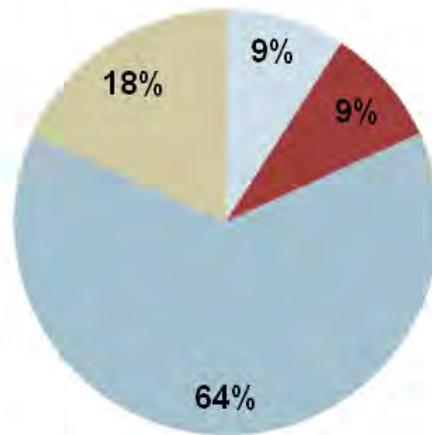
A deeper dive into the data collected:

- All but 1 (91%) companies offer a GBO to at least some of their tiers
- Only 1 company offers buyouts to *all* relocating homeowners
- 2 companies (18%) offer a GBO to the two highest tiers
- All buyouts are determined by the average of 2 appraisals, unless a third is needed
- 82% of participating companies require the appraisals to be within 5% of one another, while 2 companies allow up to 7.5% variance
- 82% also require a reduction to 105% of the buyout if the buyout is lower than the BMA average, while 2 companies do not require an additional reduction
- Interestingly, 1 of the companies allowing 7.5% variance does not require additional reduction

The average minimum marketing time for GBO homes is 81 days. Only 1 company has different requirements based on the price of the home, which requires a longer marketing time for home values above \$1 million.

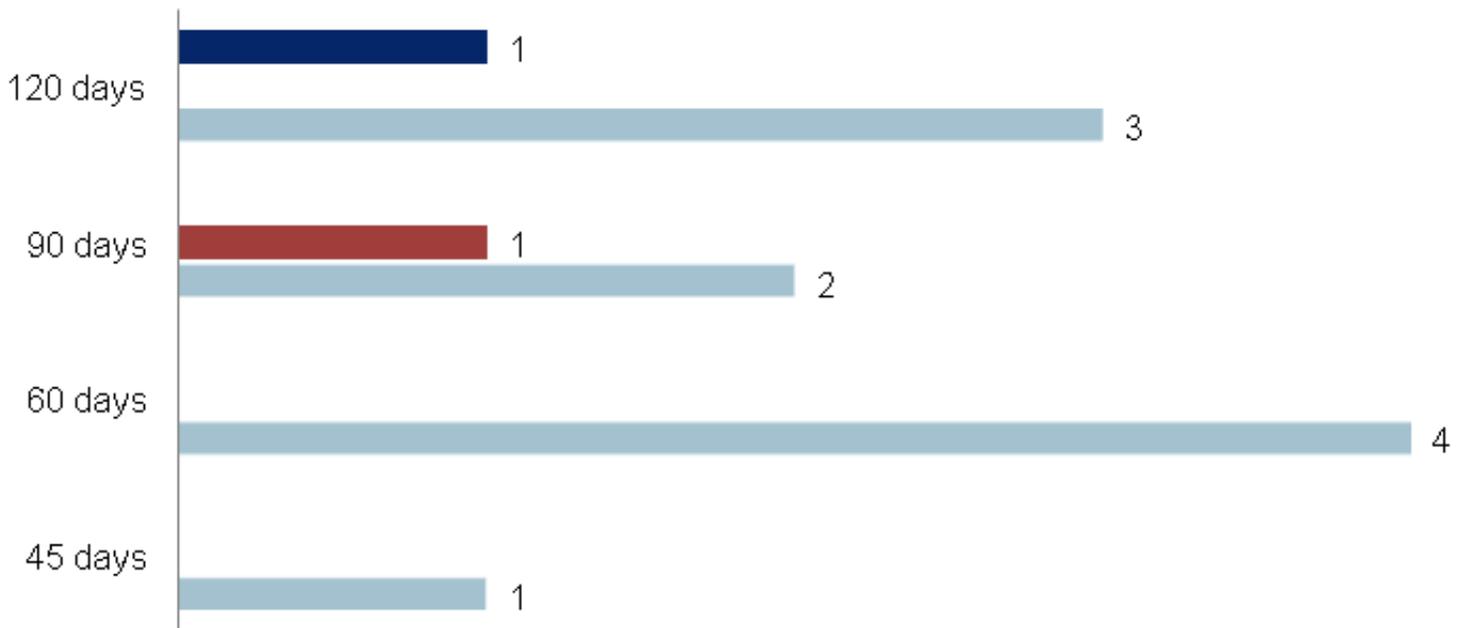
Buyouts

All None Top Tier Only Top 2 Tiers



Minimum Marketing Timeframe*

Over \$1m Under \$1m No Price Threshold



*Transferee listing requirements prior to accepting a buyout

home sale bonus.

**Note: One company did not report on bonuses.*

Only 1 company* that offers GBO does *not* offer a sale bonus. The company that does not offer a GBO still offers a sales bonus to incentivize sales.

A deeper dive into the data collected:

- 5 of the 10 companies (50%) offer a bonus to BVO
- 3 companies (30%) offer the same bonus to GBO and BVO (tiered, based on when the home sells or only if before a certain number of days)
- 2 companies (20%) offer slightly less for a BVO bonus than GBO

loss on sale assistance.

The 1 company not offering GBO is the same company not offering loss on sale assistance.

A deeper dive into the data collected:

- 10 companies (91%) offer LOS. Of these, 4 companies (40%) offer LOS to all homeowners.
- 1 of these 4 companies pays less for new hires versus existing employees but pays the same between GBO and BVO
- 2 companies (18%) offer slightly less for BVO than GBO
- 1 company offers the same between GBO and BVO, with no distinction between new or existing employees

lease break assistance.

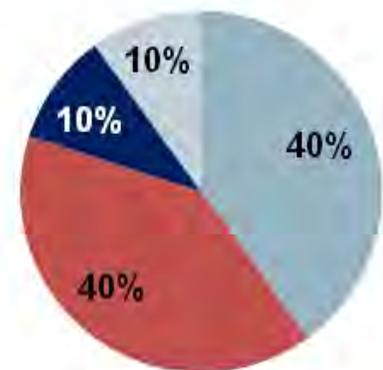
All participating companies offer to cover at least some lease break penalty coverage.

A deeper dive into the data collected:

- Most companies (64%) cover up to 2 months' rent
- 2 companies (18%) cover up to 3 months' rent
- Another 2 companies only offer up to 1 month's rent

Who receives LOS?

■ All Homeowners ■ Only GBO Files
■ Top Tier of GBO Only ■ GBO and Top BVO Only



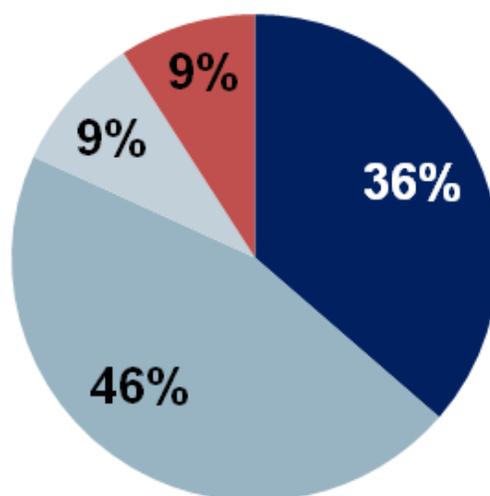
rental assistance and finder's fees.

All of the participants provide rental assistance to transferees for the majority of their policy tiers. However, the reimbursement of the assistance varies by company. Some include as part of a lump sum, a direct expense reimbursement, or a combination of a reimbursement and/or a finder's fee.

There is a growing trend, especially in top tier cities in the Northeast (e.g., New York, Boston, etc. where there is an extremely tight rental market), to compensate agents with a finder's fee for securing rental accommodations. As such, companies are offering to provide this reimbursement to rental agents in the event an agent is unable to obtain this fee from the landlord. With the advent of increased renters, companies are having to address these finder's fees. How the fee is capped varies among participants.

Finder's Fee

■ Up to 1 Month's Rent ■ Fee Typical to Area ■ Percentage of Annual Rent ■ Not Offered



temporary housing.

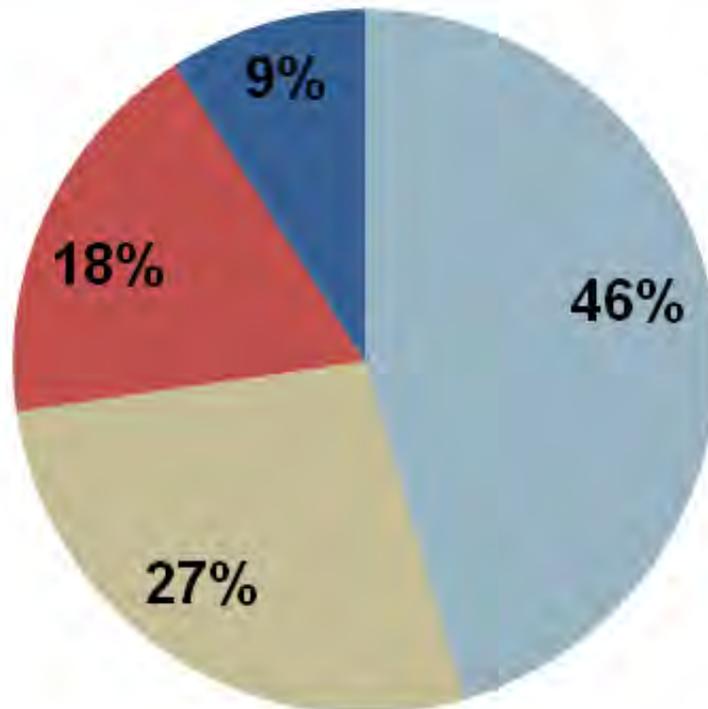
All companies cover temporary housing, but what varies is whether all tiers receive this benefit, how many days are covered, and what items are covered during their stay.

A deeper dive into the data collected:

- Only 4 companies (36%) offer temporary housing to everyone. The other 7 companies (64%) all exclude their lowest lump sum only tier.
- 5 companies direct bill only, and 3 companies (27%) pay out the benefit; 2 companies (18%) offer the option, and 1 company (9%) direct bills or pays out based on the tier
- The benefit ranges 15 to 180 days across companies and tiers
- 30 days is used in 8 policies, and 60 days is used in another 8 policies
- Most companies offer 2 – 3 levels of temporary housing based on either homeowner/renter status, new/existing employee status, or a combination of these

■ Direct Bill ■ Paid Out ■ Option ■ Direct Bill OR Paid Out*

*Based on tier



relocation subsistence.

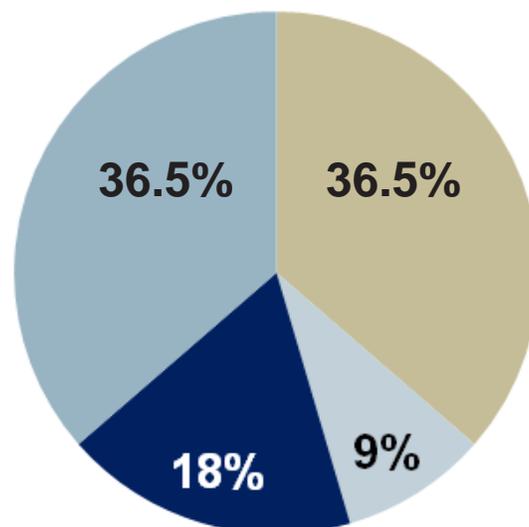
Of the 11 companies, 4 (36%) do not offer any additional monies for meals and incidentals during temporary living, all with the justification that most accommodations provide a furnished kitchen.

A deeper dive into the data collected:

- 1 company offers \$40/day, per adult, and \$20/day, per dependent, and *only* if a kitchen is not available within the unit
- 1 company offers a one-time \$200 “setup” allowance, unless the employee elects to have their temporary housing paid out, at which point the subsistence is included in the amount
- 1 company pays \$30/day during temporary living across all tiers and levels
- 1 company direct bills temporary housing but includes subsistence allowance in an additional lump sum

How is subsistence paid?

- No Subsistence
- 1-Time Payment
- Per Diem
- Added into Separate Lump Sum



allowances and lump sums.

All companies surveyed offer additional money to support their employees during relocation. Some companies prefer to make fewer, larger payments, and others are very specific as to what is considered for each sum (and, usually, this distinction is related to how gross-up is handled for the benefit). For reporting purposes, relocation/miscellaneous allowance is grouped as one benefit. Any additional lump sums, if offered, are treated as another benefit. This benefit is reported differently than any “lump sum only” tiers.

miscellaneous allowance.

All companies use tiers to distinguish miscellaneous amounts given, except for 2 (18%). Those 2 companies give the same amount to all employees except the lowest tier. Additionally, 5 companies (45%) distinguish between homeowner and renter status.

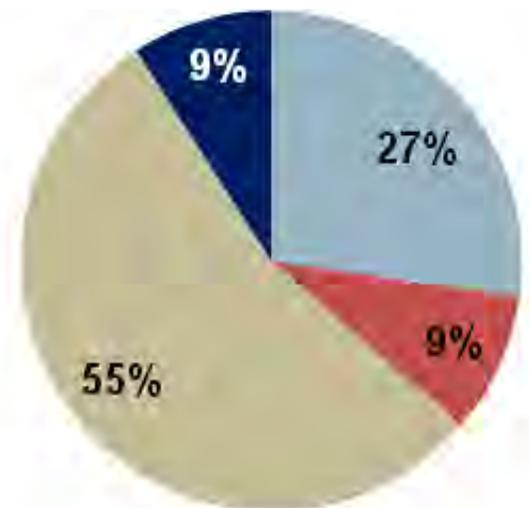
A deeper dive into the data collected:

- All offer a miscellaneous allowance or relocation allowance
- 4 companies (36%) offer 1 month's salary
- 6 companies (55%) offer a set or pre-determined amount
- 1 company offers half of 1 month's salary
- 6 companies do not offer this benefit to their lump sum only (lowest) tier
- The highest cap is \$15,000; however, 1 company does not cap the amount and provides 1 full month's salary (likely giving more than \$15,000 for some of its higher level employees)
- The minimum offered by any company is \$1,500

Types of Payments

- 1 mo. salary, with caps
- 1 or 1/2 mo. salary, no cap
- Set amount/tier*
- 1/2 mo. salary, with caps

*May include differentiation of Homeowner vs. Renter within tier



cost of living adjustment.

**Note: One company did not report on COLA.*

Only 2 of the 10 companies (20%)* express a “minimum difference” threshold, and only 1 company discussed spreading it out over a period of several years. The rest implied that any difference would be paid out as a lump sum amount at the beginning of the relocation or once the employee is in the new city.

A deeper dive into the data collected:

- 3 companies (30%) do not offer any COLA/HODA, etc.
- 2 companies (20%) offer COLA only based on the destination region (e.g. if the employee is moving to a designated “high cost” area)
- 3 companies offer COLA to everyone who sees an increase between locations, except for the lump sum only tier
- 2 companies offer COLA to higher tiers only (1 offers to the highest tier only; the other offers to the 2 two highest tiers)

lump sum only.

**Note: Includes lump sum plus household goods moving.*

Of the 11 total companies, 3 (27%) do not offer a lump sum only tier. Of the companies that do offer lump sum only, 1 company clarified that all tiers can opt for a lump sum only package that would be based on the previous year’s averages to cover what is included in their policy tier.

A deeper dive into the data collected:

- Of the 8 that offer lump sum only, only 1 does not include household goods moving, but the company does offer enough to cover most of this expense for the employee to handle individually
- The smallest amount granted for this type of tier is \$5,000
- The highest amount granted for this type of tier is \$25,000 plus household goods moving (with the exception of the 1 company that will pay out any policy tier as a lump sum)
- 2 of the 8 companies (25%) reserve the right to differentiate the amount given based on need or skill within this tier
- 3 companies (38%) offer more for homeowners than renters, another 3 have a set rate for everyone in the tier, and 1 company bases the amount on salary

household goods.

A total of 10 participating companies offer to cover household goods moving for all their employees, with an exception: 1 company does not cover their lump sum tier but, instead, gives between \$7,500 – 15,000 for the lump sum.

A common occurrence for this benefit is a tiered approach, with, for example, more auto shipments allowed and/or storage offered for higher level tiers.

storage.

**Note: One company did not report on household goods storage or auto shipment.*

Of the 10 participating companies*, 3 companies (30%) do not offer storage to their lowest tier.

A deeper dive into the data collected:

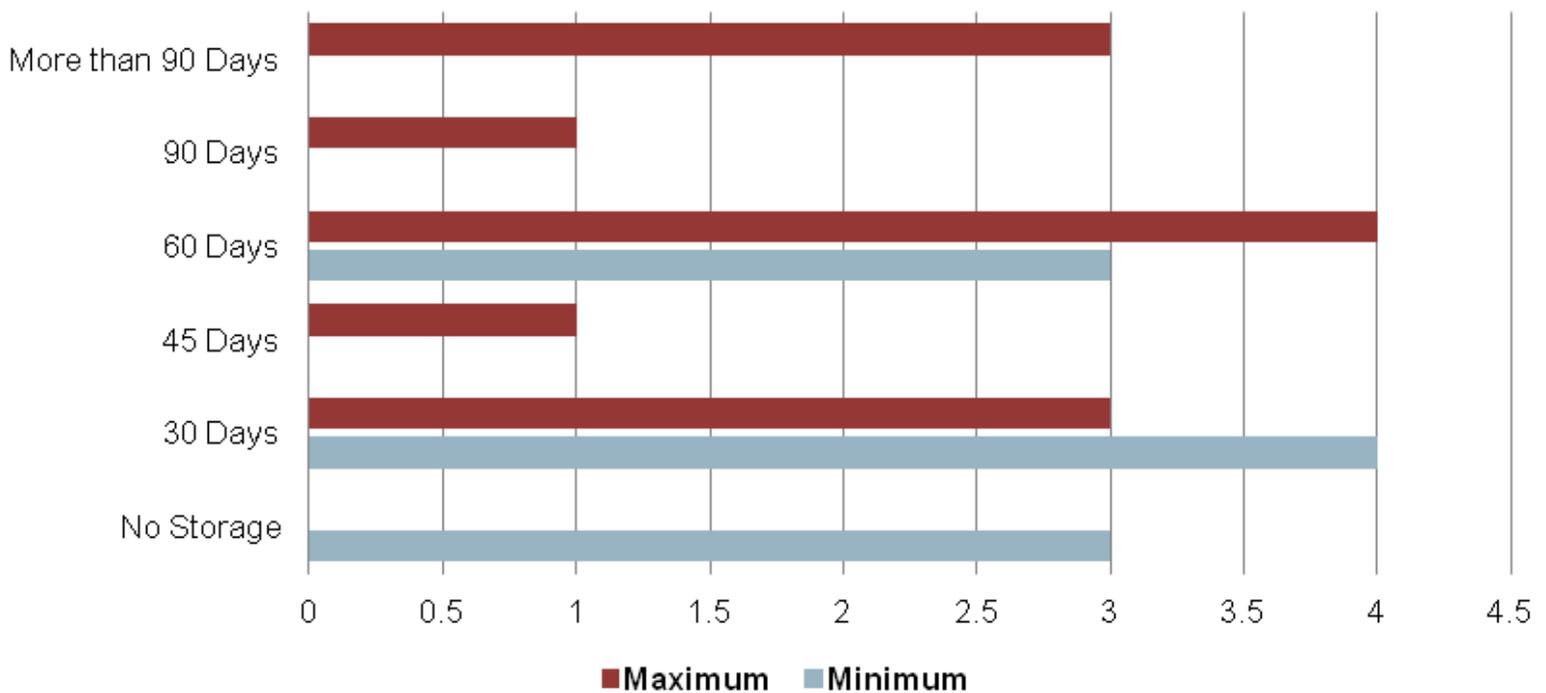
- 4 companies (40%) offer a minimum of 30 days
- The maximum number of days of storage offered is 6 months
- 3 companies offer 60 days as their minimum (even for lowest tiers)
- The average minimum granted is 30 days; the average maximum granted is 65 days

auto shipment.

These responses varied based on mileage and how many auto shipments were covered. Typically, 2 autos are shipped if the destination location is over 400 or 500 miles away (3 companies require 400 miles, 4 require 500 miles, and 1 requires 250 miles).

A deeper dive into the data collected:

- Of the 10 companies*, 2 companies (20%) do not differentiate based on tier or mileage and simply offer up to 2 autos
- 5 companies (50%) do not ship any autos if under their mileage requirement
- 2 companies will ship 1 auto if it is under their mileage requirement
- 1 company has a tiered approach and ships cars for its highest tier regardless of miles but requires 400 miles for the lower tiers (or shipped none at all)



additional benefits.

While not all companies explicitly identified “additional benefits,” many of the respondents indicated that their miscellaneous allowance is intended to cover all additional expenses. This included spousal/partner support, return trips home, househunting trips after acceptance, and pre-decision trips (not necessarily in the policy but “per management”). Unique extras included “move funds” (which served as an exception limit for the relocation vendor), mortgage subsidies in lieu of other payments or lump sums, and referral fees given back to the homeowner.

Pre-decision/Househunting Trip:

Pre-decision trips were discussed, but these are not part of any participating company’s policy and would be handled as needed per management. Househunting or rental trips and tours are common, with roughly half reporting this as a benefit after the employee accepts the relocation.

Househunting Trip:

The maximum number of days allowed per trip is 6 days/5 nights. Of the 11 participating companies, 3 (27%) recommend the lump sum pay for this up-front instead of expense tracking the entire trip.

Return Trips Home:

Only 2 companies (18%) reported using a lump sum to pay for this up-front instead of expense tracking. Only 1 company reported a tiered approach to paid trips home, where the highest tier received 4 trips and the lower tiers received 2 trips.

Homebuying Assistance:

Only 2 companies offer homebuying assistance to everyone, renters and lower levels alike. Another 2 companies offer it to all current homeowners. The remaining 7 companies (64%) offer it with a tiered approach, usually excluding the lowest tier.

In addition, 8 companies (73%) cover all “local and customary” charges without caps, leaving 3 companies that cap the amount either by tier or region.

Gross-Up:

All companies indicated they gross-up at least some of the taxable benefits, and 7 indicated they gross up *all* taxable expenses.

international policies.

Of the 8 companies that shared international policies, all have policies for short-term, long-term, and permanent transfer.

A deeper dive into the data collected:

- 5 of these 8 companies (63%) have a commuter or rotational policy
- Only 2 (25%) have a defined business traveler policy, with another 2 companies saying it was on their radar
- 3 companies (38%) said their business traveler policy is handled outside of Global Mobility by another department
- Voluntary international transfers are most often treated with a basic “immigration compliance and tax support only” approach, but 3 companies indicated it is case-by-case, implying that certain employees may receive actual benefits
- 2 companies indicated they have policies in place that vary depending on the reason for the voluntary transfer

These topics can be explored in greater detail with a follow-up study.



detailed
company
summaries.



notables & summaries.

Note: For continuity, all tiers are labeled lowest to highest with the degree of benefit listed in increasing order, e.g. "Tier 1" is the lowest level of benefit offered.

Company A

Company A has 150 domestic moves per year, 75% homeowners. It has a 4-tier policy, based on position, and differentiates between homeowners and renter. All employees receive a miscellaneous allowance that is tiered and fixed (\$5k, \$4k, \$3k, \$1.5k), a lump sum that is based on tier and destination location, and a move fund that operates as an exception approval for the relocation vendor and is also tiered and fixed (\$2k, \$1.5k, \$1.5k, \$1k). Tier 1 receives marketing assistance for home sales and a limited household goods move. Tiers 2 – 4 receive 30 days of temporary housing, 30 days of storage, and 2 autos shipped if over 500 miles. Tier 2 is for renters, with 2 months' lease assistance, 2 days of rental finding assistance, and up to a 1-month finder's fee. Tier 3 is BVO, with up to \$25k loss on sale but no sale bonus. Tier 4 is GBO with up to \$35k loss on sale and a 1% sale bonus capped at \$10k. Notable: Temporary housing can be paid out as lump sum for \$2k for homeowners or \$1k for renters.

Company B

Company B has 400 domestic moves, 60% homeowners. It has a 3-tier policy, based on position, with differentiation between existing or new hire status. All tiers receive a lump sum based on location and family status, provided before start to cover homefinding, final move, and temporary housing. All receive move assistance, with storage at tiered amounts; autos allowed (all at 2 if over 500 miles, otherwise 1 auto); miscellaneous allowance at 1 month's salary, capped based on tier; and temporary housing at tiered amounts. Tier 1 is no home sale/no lease break allowance, but a rental search fee or closing costs on new location rental or purchase, plus 30 days of storage, 15 days of temporary housing, and a \$5k miscellaneous allowance. Tiers 2 and 3 offer 1 month early termination allowance for renters or a home sale, which includes a sale bonus and loss on sale. Bonus is 2% capped at \$10k if sold in 30 days, or 1% capped at \$10k if sold 31 – 60 days. Value of loss is based on employee status. Tier 2 is BVO home sale, with 45 days of storage, 15 days of temporary housing, and miscellaneous allowance capped at \$10k. Tier 3 is GBO, with 45 days of storage, 30 days of temporary housing, and miscellaneous allowance capped at \$10k. Notable: All relocating employees, even if current renters, receive a home purchase benefit (local and customary closing costs, no cap).

Company C

Company C has 335 domestic moves per year, 70% homeowners. It is a 4-tier policy, based on position, with differentiation between homeowner and renter for miscellaneous allowance. All tiers receive move assistance, but storage and auto coverage is tiered. Tier 1 is lump sum only, with minimal household goods benefits (\$5k or \$7.5k for homeowners, \$5k or \$2.5k for renters, based on experience level). Tiers 2 – 4 receive a miscellaneous allowance equal to 1 month's salary if homeowner, half month if renter. Renters receive the same benefit of up to 2 months' lease cancellation and a finder's fee or area tour. Homeowners get closing cost assistance. Home sale, temporary housing, and household goods moving vary within tier. Tier 2 is BVO, no loss on sale, with 30 days in corporate housing, 30 days of storage, and up to 2 autos shipped if over 400 miles. Tiers 3 and 4 receive a sale bonus of 2% within the first 30 days, and 1% through 90

days. Tier 3 is BVO, up to \$50k loss on sale, 60 days of storage, 60 days of temporary housing if homeowner (30 days if renter), and up to 2 autos shipped if over 400 miles. Tier 4 receives GBO, up to \$100k loss on sale, 90 days of temporary housing and storage, and 2 autos shipped with no limit on mileage. Notable: Home sale bonus applies to upper level BVO and GBO home sales, which is unique to this company.

Company D

Company D has 400 domestic moves per year, 75% homeowners. It is a 4-tier policy, with 2 for homeowners, 1 for renters, and 1 lump sum only. Tier 1 is lump sum only and managed in-house. The amount is determined on a case-by-case basis (3 months' salary maximum, capped at \$25k). Tiers 2 – 4 receive a miscellaneous allowance equal to 1 month's salary, capped at \$10k for homeowners, \$7.5k for renters, COLA based on regions of the new location, household goods moving with 30 days of storage, up to 2 autos, and 60 days of temporary housing with a furnished kitchen. Tier 2 is for renters, including up to 3 months for a lease break fee and finder's fee for the new location. Tier 3 receives a BVO with no loss on sale, but employees are eligible for the sale bonus at 1.5% if the sale is within 90 days. Tier 4 receives GBO and up to \$50k loss on sale, and the bonus is equal to 2.5% if within 90 days. Notable: Tiers 2 – 4 are treated very similarly with subtle differences for home sales.

Company E

Company E has 150 domestic moves per year, 75% homeowners. It has 6 policy tiers with 4 levels of homeowner/renter benefits and 2 designed for lower level positions. This company did not report on home sale bonus, storage, auto shipping, or COLA within this study. Tier 1 is a \$5k lump sum and basic household goods move only. Tier 2 adds 30 days of temporary housing, 1 househunting trip, rental assistance, and a 1 month's rent lease break fee. Tiers 2 – 6 are eligible for closing cost assistance in destination, capped at \$5k for Tier 2 and no cap for Tiers 3 – 6. Tiers 3 – 6 all offer GBO to homeowners with loss on sale (first \$10k covered, 80% beyond that up to \$150k), or the same rental assistance as Tier 2 with 60 days of temporary housing for homeowners, 30 days for renters, a miscellaneous allowance of half of 1 month's salary capped at \$10k, and a lump sum paid up-front to cover a 15-day rental car, \$450 for groceries, and return trips home. Tiers 3 – 5 receive 2 trips home, and Tier 6 receives 4 trips. Notable: For tiers 2 – 6, the expense of additional temporary housing (beyond what is covered) is cost shared, based on the departure location.

Company F

Company F has 1,400 domestic moves per year, 25% homeowners. It has 4 policy tiers based on level of position: 2 with home sale, and 2 designed for lower level positions. Tier 1 receives a \$5k lump sum and a basic household goods move. Tiers 2 – 4 receive temporary housing paid out, a miscellaneous allowance, spousal assistance, and COLA. Tier 2 miscellaneous allowance is \$1.5k, lump sum based on prior average to include 30 days of temporary housing. Tier 3 is BVO with loss on sale capped at \$50k, \$1.5k miscellaneous allowance, 30 days of storage, up to 2 autos moved if over 400 miles, and lump sum based on prior average to include 30 days of temporary housing. Tier 4 is GBO with loss on sale capped at \$100k, a home sale bonus of 3% capped at \$18k within 60 days (2% capped at \$10k within 90 days, 1% capped at \$5k through end of buyout), \$2.5k miscellaneous allowance, 60 days of storage, 2 autos shipped if over 400 miles, lump sum based on prior average to include 60 days of temporary housing. Notable: All tiers have the option of a lump sum offer based on prior year averages of the relocation package, but the company preference is to only offer this to Tier 1. Only previous homeowners are eligible for home purchase closing

summaries continued.

costs (not capped).

Company G

Company G has 225 domestic moves per year, 55% homeowners. It has 4 tiers based on position, with differentiation between new hires and existing for miscellaneous allowance. All tiers receive storage, temporary housing, and equal and up to 2 autos if over 500 miles. Tier 1 receives a lump sum of \$7.5k, 60 days of storage and temporary housing, and a miscellaneous allowance of \$3k. Renters in Tiers 2 – 4 get 60 days of storage and temporary housing, lease break fee up to 2 months' rent, and a rental assistance tour/finder's fee if typical in area. Tiers 2 – 4 are eligible for home purchase and closing costs plus COLA based on 1 month's salary, with caps based on new hire or existing. Tier 2 is a BVO with sale bonus of 3% capped at \$12k if under 60 days, 2% capped at \$8k if under 120 days, 1% capped at \$4k if over 120 days, plus 120 days of temporary housing and storage, miscellaneous allowance capped at \$5k for existing, \$3k for new. Tier 3 is GBO with 50% loss on sale capped at \$10k, a sale bonus of 3% capped at \$18k if before appraisal (2% capped at \$12k if after), 120 days of storage and temporary housing, and a miscellaneous allowance capped at \$5k for existing, \$3k for new. Tier 4 is GBO with 50% loss on sale capped at \$30k, a sale bonus of 3% capped at \$24k before appraisal (2% capped at \$16k if after), 6 months of storage and temporary housing, and a miscellaneous allowance capped at \$10k for existing, \$5k for new. Notable: Temporary housing can be paid out as an estimated lump sum to include room for meals; otherwise, a 1-time kitchen setup of \$200 is provided. There is a home sale bonus for BVO as well as GBO to motivate sale.

Company H

Company H has 200 domestic moves per year, 70% homeowners. The policy has 2 tiers based on management level, with differentiation between homeowner and renter. Tier 1 is a lump sum only: \$15k for homeowners, \$7.5k as renters. No household goods moving or temporary housing. Tier 2 homeowners receive a BVO, no loss on sale, but a bonus if sold within 60 days (1% capped at \$6.5k), plus they receive 60 days of temporary housing with \$40 per day per adult and \$20 per day per dependent if no kitchen, along with move assistance and 30 days of storage, with 2 auto if over 400 miles, and a miscellaneous allowance of \$5k. Reimbursement of final move expenses, mileage, househunting trip for 6 days, and meals for both. Tier 2 renters receive up to 2 months' lease break fee, 1 month finder's fee if typical to the area, temporary housing for 30 days with \$40 per day per adult and \$20 per day per dependent if no kitchen. They also receive move assistance with 30 days of storage, 2 autos if over 400 miles, a miscellaneous allowance of \$5k, and reimbursement of final move expenses, mileage, househunting trip for 6 days, and meals. Notable: No COLA, no GBO, no loss on sale.

Company I

Company I has 340 domestic moves per year, 55% homeowners. It is 3 tiers based on manager discretion for the position and budget. All tiers receive household goods with 60 days of storage and up to 2 autos, no limits on miles. Tier 1 is

a lump sum, with amount based on position at \$5k, \$10k, or \$25k. Tiers 2 and 3 are eligible for COLA, temporary housing paid out to equal 60 days based on location and family size, and also covers homefinding trip, final move trip/settling-in support, and spousal assistance. Tier 2 is BVO home sale (no bonus or loss on sale), or renters receive 3 months' lease break fee and finder's fee, and a miscellaneous allowance (\$5k homeowner, \$2.5k for renter). Homeowners can receive purchase closing costs. Tier 3 homeowners receive GBO (loss on sale capped at \$50k, a bonus up to 2% capped at \$10k), and Tier 3 renters receive up to 3 months' lease break fee plus choice of finder's fee for new rental or purchase closing costs. They also receive a miscellaneous allowance (of \$10k homeowner, \$5k renter). Notable: Flexibility on list price instead of a firm policy for up to 30 days. COLA is only in 12 select cities and with a 2% difference minimum.

Company J

Company J has 500 domestic moves per year, 60% homeowners. It has 4 defined tiers, plus a tier for new hires within a local area, and a customizable tier option as well. Tiers are based on level of position and experience of employee. All tiers receive household goods, including 2 autos if over 250 miles. Tier 1 is lump sum, set at \$5k homeowner, \$2.5k renter. Tiers 2 – 4 and a low mileage tier are eligible for a home sale, up to 2 months' lease break, up to 12% annual rent for a finder's fee, 60 days of storage for homeowner/30 for renter, a miscellaneous allowance, temporary housing, and home purchase assistance. Tier 2 (the low mileage tier) receives BVO, \$15k homeowner or \$7.5k renter miscellaneous allowance (which includes temporary housing and subsistence), but no sale bonus or loss on sale. Tiers 3 and 4 are GBO with a sale bonus of 4% under 45 days (capped at \$24k), 3% under 75 days (capped at \$18k), 2% under 90 days (capped at \$12k), or 1% (capped at \$6k) up through acceptance. Tier 3 receives miscellaneous allowance of \$5k, no loss on sale, but temporary housing of 90 days homeowner, 30 renter. Tier 4 receives loss on sale capped at \$50k, a miscellaneous allowance of \$7.5k, temporary housing at 90 days homeowner or 30 renter, plus eligibility for COLA based on region. Notable: Developed a policy for relocations that are within a "local" area, which is unique to this company.

Company K

Company K has 450 domestic moves per year, 60% homeowners. Policy has 3 tiers based on management level and status of new hire or existing. Tier 3 covers all existing employees, while 1 and 2 are for new hires only. All tiers receive household goods with 60 days of storage, 2 autos if over 500 miles. Tier 1 is BVO (no loss on sale or bonus) or up to 2 months' lease break fee (no finder's fee), plus a lump sum of \$7k for homeowner, \$3.5k renter. Tier 2 is BVO (no loss on sale and no bonus) or up to 2 months' lease break fee, plus a lump sum of \$4.5k homeowner (\$2k renter), temporary housing of 60 days homeowner (30 for renter), \$30 per day for meals, a househunting trip for 5 days, and purchase closing costs with caps per region. Tier 3 is GBO with full loss on sale but no bonus, or up to 2 months' lease break fee, a lump sum of \$4.5k homeowner (\$2k renter), temporary housing at 60 days homeowner (30 renter), \$30 per day for meals, a househunting trip for 5 days, and purchase closing costs with caps per region. Notable: Larger variance allowed on appraisals than BMA. No additional reduction required for GBO. No sale bonus, no cap on loss on sale, no COLA.

While all companies claim a commitment to top customer service, we take things one step further to prove our dedication. We use the Net Promoter Score™ to measure not just service but also *loyalty*. On a -100 to 100 scale, a score of 100 is perfect. Scores above 70 are superior. So, what's ours?



What does this mean for you? It means you won't just be working with a customer satisfaction supplier; you'll be working with a customer satisfaction innovator.



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**Temkin Group Q3 2015 Consumer Benchmark Survey*

WHR Group is pleased to be named a Top Workplace for a third consecutive year. The Milwaukee Journal Sentinel joined forces with Philadelphia-based research firm WorkplaceDynamics, LLP for a seventh year to survey employee engagement at large, medium, and small companies throughout Southeastern Wisconsin.

According to the Journal Sentinel, "The best employers recognize that employees are their most precious asset, and those employers work hard to provide a workplace that gives each individual the greatest opportunity to succeed. Those are the businesses and organizations we want to recognize."

WHR Group's success is driven by talented, energized, and engaged employees. This award is a great recognition of the ongoing efforts to create a work environment that brings out the best in our co-workers and gives us all a place we look forward to coming to every day.



WHR Group is a SOC 1® certified service organization for system design, operating effectiveness, and internal controls.

To ensure that WHR Group protects clients' and employees' highly sensitive data, funds, and personally identifiable information, WHR Group completes this annual SOC audit of our relocation system, conducted by an independent firm.

This formal audit is designed to test the operational controls that we have in place to protect the interests of relocation data.

Since our first audit in 2008, we have passed the audit without exception every year.



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