

Global Mobility Playbook

GROUP MOVE GUIDE

Relocating multiple employees during organizational changes requires a strategic and well coordinated approach that ensures efficient logistics, maintains workforce continuity, and fosters employee morale, all of which are essential for a successful business transformation



Executive Summary

In today's ever-evolving business landscape, companies often undergo organizational changes that require relocating multiple employees at once, whether to consolidate offices, expand into new markets, or support mergers and acquisitions. These large-scale relocations, commonly referred to as "group moves", come with a unique set of challenges and considerations. For mobility teams, group moves are more than logistical exercises; they are strategic initiatives that impact workforce continuity, employee morale, and overall business success.

A group move usually entails relocating a specific number of employees. This could involve a small team or, in some cases, hundreds of individuals moving to a new location. While these relocations often occur within the same country, they can also be international. Despite the seemingly straightforward nature of this concept, the planning and execution involved are quite complex. Unlike individual relocations, group moves require a coordinated strategy that balances business objectives with employee needs, within tight timelines and often under visibility from leadership.

One of the first steps in managing a successful group move is understanding the factors that can make or break the process. It starts with clear alignment of business goals. Whether you're moving employees to reduce costs, access new talent markets, or support organizational growth, knowing the "why" behind the move helps shape the overall approach. Mobility leaders also need to assess the demographics of the employee group, considering roles, seniority, and family situations, to determine the level of support each segment will require.



Policy Design & Considerations

In order to create a successful group move policy, your company's business goals need to be fully understood, and then an applicable policy can be built that is aligned with your overarching objectives.

Developing a formal group move policy is crucial for ensuring consistency, setting expectations, and controlling costs during large-scale employee relocations. Your group move policy should define eligibility, benefit tiers, support services, timelines, and may include incentives like retention bonuses.

Fundamental differences between a traditional relocation policy and a group move policy include:

- Fixed time for group move policy vs. a traditional policy
- Policy is aligned with the group move goal vs. an operational/specific position approach in a traditional relocation policy
- Traditional policy bands with benefits need to be expanded to support a larger group move population
- Expanded support services for spouse/partner and extended family need to be considered in a group move policy
- To control costs and monitor service, supplier selection and fees are negotiated based on the group move vs. ongoing relocation activity
- Employment separation policy provisions for employees not taking the move
- Home pricing and appraisal considerations
- A focus on how the group move will impact the local community/real estate market

Addressing these crucial questions will guide a group move plan and policy toward success

- What is the impact to the community being vacated?
- Will housing values be compromised?
- Is the new location more expensive, particularly in regards to housing?
- Will salaries need adjusting to compensate for the location?
- Is there a desire to transition all workers or eliminate positions?

Specifically:

- Do you want employee attrition?
- Will retention bonuses be provided?
For how long and how much?
- Will all employee roles receive the same level of benefits?
- Should retirement or early retirement options be available?

The impacted employees will have their own questions/concerns:

- Where is the new office?
- Will my role change?
- Will my co-workers or boss change?



Timelines, Strategies & RMC Support

Timelines are another critical piece. Group moves often happen in phases, and it's important to establish key milestones early on. Having a well-structured communication strategy is also essential. Employees need timely, consistent information about what's happening, how it affects them, and what support will be provided to them. Without a clear message, uncertainty can quickly lead to disengagement or even attrition.

This is where partnering with a Relocation Management Company (RMC) can bring substantial value. RMCs specialize in managing complex relocations and can act as an extension of your HR team. From project planning and policy design to vendor coordination and employee support, an experienced RMC brings structure and scalability to what might otherwise be an overwhelming process.

Working with an RMC allows you to:

- Offload day-to-day logistics and vendor management so you can focus on strategic decisions
- Develop a tailored group move policy that reflects both industry benchmarks and company's goals
- Provide employees with hands-on guidance through the entire move, improving acceptance rates and reducing stress
- Access real-time data and reporting tools to track progress, manage costs, and adjust if needed

Partnering with WHR Global

From strategic project planning and policy development to vendor coordination and employee support, WHR delivers structure and scalability to what can otherwise be a complex and overwhelming process. We specialize in managing intricate relocations and serve as an extension of your HR team. WHR's global footprint ensures the capability to handle group moves of all sizes and complexities.

We can help establish procedures to assess employee relocations, determine relocation policies, and project acceptance rates. Striving for utmost ease of communication during group moves to offer thorough yet stress-free support of high-level program components by promoting a high-tech, human-touch commitment.



We recommend the following strategies to support group moves:

- In-person meetings - local providers, relocation directors, appraisers, van lines, and title companies
- Placement of blanket referral agreements with broker agencies
- Local bus tours in destination location
- Chamber of Commerce and real estate/rental market presentations
- Individual housing tours with prospective assignees and their families
- In-person relocation program presentations for prospective assignees and their families
- Individual break-out sessions for Q&A with prospective assignee and their families
- Welcome packets and informational brochures with useful of informational websites like NeighborhoodScout (available in the WHR transferee portal)
- Special cost tracking, retention statistics, market data, and benchmarking data

Group Move Key Metrics



The establishment of all metrics is typically done during the implementation phase, with key client stakeholders, as their input is integral for measuring the elements critical to success reporting.

Metrics that are specific to monitoring group move success include the following:

- Identify the employees to be part of the group move
- Survey their needs for relocation:
 - Identify those that will/will not take the move
 - Main concerns for employees willing to make the move
- Candidate acceptance ratios:
 - Plan to contact these employees
 - Consider additional inducements to promote benefits of the move
 - Start local recruiting efforts to replace employees, if needed
- Implement the relocation package:
 - Monitor these employees for any policy issues
 - Track their home sale success
 - Track their home purchase/rental dates
 - Report employees go-live date in the group move location
 - Supplier metrics/performance in the form of supplier scorecards
 - Costs based on budget-to-actual
- Post move tenure
- Track how long employees stayed at the company in the new location
- Complete a 12-month post-relocation survey
- Review individual transferee satisfaction ratings
- Departure location amended value and/or sales ratings and inventory absorption ratings
- Satisfaction rating for the group move presentations and on-site tours



5 Phases of Planning & Managing Group Moves



To aid in the implementation of such a specialized program without leaving any question unanswered, a group move should be completed in 5 distinct yet comprehensive phases:

1

PRE-ANNOUNCEMENT

Think of this as the discussion phase. Consider what you'll need to communicate to the employees before the relocation is publicly announced. Communication and being proactive in messaging is critical to eliminate rumors, provide employees with the business rationale, and explain the overarching process and timeline for the relocation.

Use these discussions as an opportunity to clearly articulate milestone dates and explain how the company will address employee questions and concerns as the process progresses through its lifecycle. Map out thoughts on retention and/or severance plans, determine appropriate budgets, and, something often overlooked, consider a recruitment plan in the new location if the employees don't accept their relocations.

Key Factors:

- Explain the business rationale
- Ensure communication is proactive, ongoing, and consistent
- Develop a project timeline outlining key dates
- Craft the retention and/or severance plans
- Have the policy in place and available for employees
- Determine appropriate budgets
- Determine the recruitment plan if employees don't relocate

5 Phases of Planning & Managing Group Moves



2

ANNOUNCEMENT DAY COMMUNICATION

Effective communication is key. Plan a targeted announcement to affected employees as soon as a clear relocation strategy is in place. WHR provides guidance on communication points to ensure your talent has the necessary information.

Key Factors:

Here are sample topics your employees may ask you about.

- Timelines, such as: the date they need to report in the new location; how long it will take to sell their current home; purchase a new home in the destination; provide lease cancellation to their current landlord; and how the timeline will impact their children's schooling and enrollment periods
- What relocation support they will receive, and how the cost of living compares between their current location and the destination
- Some employees will request to work remote full-time; As a leadership team, are you willing to part ways with that employee if they're unwilling to relocate
- Are there any tax implications related to the relocation I should be aware of?
- How will the relocation impact my current employment contract or agreement?
- Can you provide information about the new city, like neighborhoods, schools, and local amenities?
- Can I choose my own moving company and/or real estate agent?

It's critical that you and your leadership team have sufficient responses and plans prepared; otherwise, your employees may feel the decision has been made in haste.

5 Phases of Planning & Managing Group Moves



3 POST ANNOUNCEMENT

This focuses on solidifying the discussed plans and structuring the impending relocation policy. Hold individual employee (and possibly spouse/partner/family) reviews of the proposed policy. Ensure the policy is designed separately from any pre-existing traditional policies.

Conducting an employee survey to understand who will take the move and desired timing of moves, by position, is a great way to keep the policy in sync with employees' needs. While a group move requires a significant deal of investment, the move can only be as successful as the benefits offered to support current employees.

As a hands-on means for onboarding, plan group destination tours with local area experts to discuss the benefits of the new location. Consider the helpfulness and effectiveness of providing a resource center, an online or physical location that offers detailed information about the policy, its benefits, the new location, and changes the employee and their family can expect. This can mean brochures, location guides, school information, and recreational information.

Key Factors:

- Survey employees to understand who will take the move
- Individual employee review of policy
- Ensure spouses/partners are included in policy briefings
- Ensure policy is carved out separately from normal relocation policy
- Group destination tours with area experts to discuss the benefits of the new location
- Vendor/supplier training and coordination to ensure availability and service delivery

5 Phases of Planning & Managing Group Moves



4

IMPLEMENTATION

Once planning is complete and onboarding efforts have been made, authorize the first waves of employees. Sticking to the developed relocation timeline is crucial to the success of these first moves. If there are unanticipated issues with the timeline or delivery of benefits, it will be critical to make adjustments before additional waves of relocating employees are impacted with the same issues.

The ongoing measuring and management of the group move process is what will determine its success, both for employees' work lives and for the business. Above all else, it is important that you select a relocation provider with thorough group move experience and that can manage employee transitions while simultaneously supporting the business goals and objectives.

Key Factors

- Establishment of all metrics for measuring success with key stakeholders
- Authorize the first wave of employees (individual relocations begin)
- Ensure project timeline is kept on track and milestones are being met

The most successful group move policies align the strategic goals with effortless consolidation to the new area, but how is this achieved? There are significant investments of time, money, technology, physical assets, real estate, human emotions, and other variables to consider.

Ways to help ease the burden of these variables include:

- Customizing policy design based on needs gleaned from pre-move survey and business objectives
- A mobility process-mapping and flow analysis
- Multi-tiered, assignment-specific policy consulting
- Cost analysis and containment initiatives
- Program and change management
- Heightened technology support from your relocation provider
- Process improvements
- Risk assessment reporting
- A focus on talent retention, productivity

5 Phases of Planning & Managing Group Moves



5

EVALUATION

While companies may believe their group move policies are well defined, there is only one way to know for certain, and it boils down to employees' transition successes. How can you know for sure that the policy has a winning combination of ease of moving, cost containment, and employee satisfaction? Surveying employees is the easiest route to collect this metric.

- Survey employees' pre-move needs
- Identify those who will/will not move
- Report on those who are not accepting their moves:
 - Plan to contact these employees
 - Consider additional inducements to promote benefits of the move
 - Start local recruiting efforts to replace employees, if needed
- Implement the relocation policy of those accepting the move
 - Monitor these employees for any policy issues
 - Track home sale, purchase/rental successes



After successful relocations, WHR provides information for evaluation and recommends improvements for future group moves. By leveraging interactive data analytics dashboards like WHRInsights, we review what went right and what could be improved:

- Employee surveys measuring their satisfaction with WHR's service, technology, supplier partners, and the relocation benefits your organization offered.
- Cost summaries, including multi-currency budget-to-actual spend, budget cost accrual reports, average cost per completed relocation;
- Policy exception requests, including approved and denied exceptions; and more!

Summary

At the end of the day, a well-executed group move is more than a transition but a statement about your company's values, culture, and commitment to supporting your people.

With a solid policy and experienced partners in place, it can strengthen employee engagement, preserve business continuity, and lay the groundwork for future success. By focusing on key details, such as setting clear objectives, thoughtful planning, and supporting the emotional needs of relocating families, organizations can create a smooth and positive transition.

Clear communication from leadership, flexible policy design tailored to individual needs, and proactive attention to destination-specific factors like, cost of living or housing availability in the new community, can further enhance the relocation experience for everyone involved.

To increase your odds of success, consider these best practices:

- Start planning early - give your team and employees time to prepare
- Design policies that are fair, flexible, and aligned with employee demographics
- Communicate regularly and transparently - don't leave employees guessing
- Use feedback and data to make informed adjustments along the way
- Partner with an RMC and involve them from the beginning
 - Select a relocation provider, like WHR Global, with strong group move experience who can manage employee transitions while supporting business goals
 - Ensure the provider offers:
 - Site assessments, feasibility studies, and communication strategies
 - Team-oriented support in the new location to help employees start their new careers confidently and collaboratively





Established in 1994, WHR Global (WHR) is a private, family owned, full-service international relocation management company.

We partner with human resources, travel divisions, and global mobility departments at a wide variety of organizations from Fortune 100 corporations to the US Government.

We are dedicated to Advancing Lives Forward® by providing white-glove service for employers and their global workforces. With a proprietary technology suite, WHR strives to offer cost-effective relocation benefits without compromising empathy, ethics, or service.



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Global Headquarters
Coordinates all relocations
into the Americas

Basel, Switzerland

EMEA Office
Coordinates all relocations
into Europe, the Middle East,
& Africa

Singapore

APAC Office
Coordinates all relocations
into Asia Pacific