



A guide to successful business
critical (VIP) assignments

because it's personal



To help HR & global mobility professionals tackle the unique challenges posed by business-critical assignments (VIP), Daniel Natoli, Managing Director at K2 Bespoke and our UK Advisory team have developed this guide.

We set out how best to manage business-critical moves. We identify the key challenges and guide you through risk management strategies with the aim of showing you how to ensure the optimum outcome for both the employee and the business.

- 1 What is it that makes your assignment business-critical?
- 2 The key criteria and benefits of business-critical assignments.
- 3 How to better understand the complexity of business-critical assignments.
- 4 How to best plan for business-critical assignments:
 - Personalisation
 - Exceptional project management
 - Outsourcing and service partners
 - Confidentiality, security and duty of care
 - Communication and responsiveness
- 5 The most important considerations to ensure success.

1. What makes an assignment business-critical? Four key factors

Building a robust and flexible global mobility framework is a challenging undertaking. Not only do you need to ensure optimum alignment with your overall HR and business strategy, but also remain as agile as possible in order to meet the expectations of today's talented employees.

If you manage to get a handle on all the key elements and devise a multi-layered mobility framework, it may feel like you have everything covered. But in reality, however flexible your framework, there will always be occasions when an assignment falls outside of standard policies and programme coverage.

1. Extraordinary employee value

When your employee or workforce population has significant prominence within and is of significant value to your business. Distractions must be minimised in order to protect productivity. The risk factor is high due to the business-critical nature of the employee's role - this increases the pressure on both the employee and the team responsible for their relocation.

2. Extraordinary personal requirement

Where the personal requirements of your employee or workforce population - often involving their families - present unique and complex challenges.

3. Extraordinary destination risk

Where the destination presents a complex set of challenges, over and above a typical hardship location and where typical allowances and services in place to mitigate and manage risk, may not suffice. Extraordinary destination risk transpires if the destination is particularly inhospitable, has acute security risks or is a new location.

4. Extraordinary organisational requirement

Where your organisation's own requirements create challenges. For example, where time-critical deadlines take priority, or where an exceptional level of flexibility is demanded from your employee or workforce population.

Research shows that up to 5% of global assignments fall into the business-critical category - in these instances, the level of policy exceptions required to make the assignment work make the existing policy unviable. Creating a new policy would be equally unviable due to the unique nature of the employee's requirements, requirements which are highly unlikely to be replicated in future assignments.

Human considerations must also be taken into account. Relocation can be an emotive and stressful time, with strategic and personal factors constantly vying for precedence. A 'one size fits all' approach simply cannot be applied to such assignments.



2. Key criteria and benefits of business-critical (VIP) assignments

Premium services and upgrades are nothing new. They are routinely used across a myriad of sectors, products and services. They offer additional, tailored levels of support or access based on unique requirements.

But what does this mean for global mobility?

There are multiple circumstances when a business-critical or VIP classification may be appropriate for an assignment. An employee's role, their leverage, their seniority and their skillset may all play a part in classifying them as an eligible candidate.

Types of VIP

Members of the board and executive team

A very senior-level employee with critical responsibilities, valuable experience and significant leverage.

Business owners and founders

Individuals who are highly accountable and who have significant organisational influence. The critical nature of their position creates additional requirements/ considerations when it comes to relocation and demands increased attention to detail.

Sector specific

The parameters of the term 'VIP' vary according to industry sector or the legal structure of a business. For example, legal and accounting firms have senior partners who would meet the VIP criteria; senior partners in other sectors would not.

Extraordinary leaders and performers

Employees with critical or highly-prized skillsets who are high-profile and highly influential.

Levels of support

'One-of-a-kind' business

Critical assignments – bespoke planning, including a confidential and senior-level budget approval process, is required. These moves require experienced experts to deliver the service needs of the assignment. An extraordinary level of detailed planning is crucial to success.

Regular business-critical assignments

Typically found in hierarchical businesses or large global corporates. For example, partner-based structures in which numerous individuals hold prominent and senior-level positions. The delivery is not as much about the range of services, but rather the specialised method of delivering them – senior-level service support is often required.



Benefits

Business benefits

A successful business-critical relocation will minimise both distractions and loss of employee productivity. As a result, your organisation will be better positioned to manage risk and enhance return in key areas such as profitability, internal and external reputation, shareholder value, employee productivity and motivation, as well as improved competitive market position

Assignee benefits

A new location offers a new perspective. The assignee will gain valuable insight into a different region and market. They

will have the opportunity to grow their skillset, experience and credibility, potentially realising career and/or lifestyle aspirations along the way.

HR department benefits

In addition to the technicalities of moving a business-critical employee and their family from one country to another, human and emotional elements must be taken into consideration at every stage of the process.

If you also manage to incorporate flexibility to support wider human and emotional elements, the rewards from

an employee's recognition and retention, are typically significantly amplified.

The decision to relocate a business-critical individual is both high gain and high risk. Therefore, evaluating, managing and dissolving any and all barriers to success is of the utmost importance.





3. Understanding the complexity of business critical (VIP) assignments: the 5 key challenges

Before developing a programme to support executive, VIP or business- critical assignments, it is important to understand the challenges involved. But where do you begin? To help you on your way, we explore five of the top considerations for such assignments.

1. The time-poor nature of the VIP

Typically, executives are constantly in high demand, are frequent business travellers and have very tight schedules. All of this makes them extremely time-poor. Due to their critical role within your organisation, it is crucial that any relocation does not distract them from focusing on their work. Managing this can create additional pressures for the global mobility function – support is often required at unusual hours, with rapid response times expected and specialist queries requiring a swift resolution. Poor

communication and responsiveness will hinder progress, risk increasing costs and potentially damage your organisation's reputation. It is key that the requirement for exceptional levels of support does not create a barrier to success. Is this something that you can resource internally or would you benefit from external expert support?

2. Heightened state of awareness

Executive and VIP assignments usually generate a heightened level of awareness, drawing attention from many angles. Consider how you are going to manage this heightened focus to ensure your professional reputation is upheld and to maximise the internal PR opportunities that getting it right can create. A successful VIP assignment can create a terrific opportunity to gain the backing you need for your overall global mobility programme.

Key areas to manage

From the business

Within the business, many eyes will be fixed on the progress of the relocation. The success or failure of a VIP move can affect individual and team morale. From a financial perspective, the business-critical nature of the assignee's role makes it essential that the assignment goes well. Expect to be questioned by senior stakeholders with whom you may never have had any contact with before. Be prepared with data and details that you might need - where will this come from and how quickly can you obtain it?

From the employee

The employee will also be feeling the pressure, aware that they carry a significant proportion of responsibility for the success of the assignment. There will be a very high expectation to deliver results. There will be personal and family pressures – how will you support the employee and their family to prevent small niggles becoming larger issues?

From within your mobility team

Due to the heightened risk and increased work load, pressure within your mobility team will increase. The need for increased responsiveness, specialist experience and

expertise, and the extra time required to co-ordinate and manage all of the elements of the relocation will likely impact resourcing. On top of this, your existing assignment programme must continue to receive the requisite amount of attention. Successfully managing this extra workload is a difficult task that requires a great deal of planning.

From the media

Media coverage can be valuable in helping to promote your business. But unwanted or negative media attention creates risk and adds pressure. Unless your business openly shares mobility-related information, it is likely that you will wish to be discreet when it comes to your business-critical moves. Such a move is often news-worthy and runs the risk of being picked up by the media. It is important to consider how to best maintain discretion and to identify the information security protocols that both vendors and your own employees should be governed by. In certain sectors, confidentiality is paramount and must permeate the entire relocation process, from planning through to end of service.

3. Financial, tax and legal complexities

At this level, managing the financial aspects of an assignment tends to be extremely complex. An assignee's personal financial investments and remuneration package can be very difficult to navigate. Share schemes, pensions, benefits and rewards may also be subject to complicated tax regulations.

Planning is crucial. Think carefully about the timing of bonus payments, which could have a negative financial impact on your organisation if made at an inopportune moment. Ensure that you have a thorough understanding of all things tax-related in order to protect both your organisation and the assignee. Be aware that the structure of contractual arrangements may also be particularly challenging for a business-critical assignee – understanding employment legislation in all the relevant jurisdictions is key.

Finally, immigration requirements need to be considered early on to ensure that all parties involved are fully aware of the multiple implications of living and working in another country.



4. Policy: deciding what to include in your VIP service

Executive, business-critical or VIP assignments tend to fall outside of standard approach parameters. By their very nature, one-of-a-kind VIP moves cannot be used for the basis of a process that will subsequently be repeated. Often, rather than working to define a specific policy, a more relevant and effective approach is to define guidelines, setting broad parameters and outlining the type of employee who qualifies for this level of service. Alternatively, your organisation can create specialist policies, or flexible components within standard policies, to reflect tiers of seniority and/or complexity.

What is the difference between an increased range of services and an enhanced level of service or support? What exactly is meant by a high level of discretion? Exact definitions can prove tricky to pin down. Whether prescribed in a policy or applied ad-hoc, most organisations look to flex benefits and support for their business-critical employees, however having a defined governance process will help your organisation to navigate to highly complex process of moving VIP employees.

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Managing Director
K2 Bespoke





5. Managing Risk

VIP moves have the potential to generate an exceptional return on investment.

However, they also come hand in hand with multiple risks. By understanding the associated risks, you can take steps to manage and mitigate them. Risks can include:

Strategic. Risk of business strategy being compromised, should significant issues arise with the employee's move or suitability for a role.

Operational. Disruption of an organisation's day-to-day operations as a result of crucial skills or resources being unavailable at a vital time.

Human. Risk of the move threatening the safety of the assignee. For example, a move to a dangerous location.

Legal. Contractual, insurance and employment non-compliance are risks which increase exponentially in line with the complexity of the assignment.

Compliance. Regulatory and immigration restrictions may inhibit assignments. No assignee is exempt from compliance requirements.

Financial. Investment in the assignment will be high, so significant ROI will be expected. Predicted financial gains for the business may be forfeited if there are delays in the progression of the assignment.

The phrase 'time is money' takes on increased significance with VIP moves.

Reputational. An unsuccessful VIP move can catch the attention of the media. Bad press can have a detrimental effect on an organisation's reputation and may result in a loss of revenue. It may also impact employee morale, hamper recruitment, and impact supplier or vendor business terms.

Political. Often, the leverage of business-critical employees extends beyond the business. The greater the scope of the leverage, the greater the scope of the associated risk.

Failure to manage this risk can lead to reputational damage for both the HR department/global mobility function and the organisation as a whole.

4. Planning considerations for business-critical (VIP) assignments

In the case of business-critical assignments, a one-size-fits-all approach isn't fit for purpose.

Key to success is a distraction-and stress-free employee experience, made possible by detailed planning, careful management and precise execution.

Leveraging two decades of global mobility experience, we have identified the key elements that need to be considered during the planning stage of a business-critical assignment.

Personalisation

Tailoring the assignment so that it is the right fit for both the individual/workforce population and your organisation.

Organisation culture and approach

Consider your company culture and how to apply VIP level support consistently and fairly. Be aware that how you define and position eligible employees or populations within your overall global mobility programme may vary.

Business-critical assignees are often time-poor and thus require a high degree of flexibility and responsiveness.

Critical is not the range of services provided, rather the way those services are delivered. The result of exceptional service delivery? A positive, productive and seamless assignee experience.

Create a personalised assignment experience

Focus on service enhancements – business-critical employees tend to be more effective if their personal needs and motivations are understood and supported. As a result, a VIP move should see sharpened customer service objectives leading to outcomes that are above and beyond assignee expectations.

Consider how you can use these moves to drive innovation within your overall programme, introducing tried and tested service enhancements for your assignee population as a whole.



Do your research

Knowing your audience is vital. Develop an understanding of your assignee's motivations, speak with their colleagues and their PA, build a picture of their personal life (spouse, children, pets etc.)

This will help you to view situations from your assignee's perspective, providing you with the understanding necessary to go that extra mile in improving their experience.

Build a relationship early on – taking your research one step further by connecting with your assignee on a personal level. Get to know them as a person rather than an project, creating a bond of trust which will result in greater transparency and so make it easier for you to manage the move.

Exceptional project management

Managing a VIP move is much like managing a project. It requires a budget, a plan and a timeline, plus tailoring in response to specific requirements. Upfront planning is absolutely critical for success.

Provide a clear brief – from the outset, develop a brief with clearly defined goals. Ensure that these goals are communicated to both your team and your chosen service partners.

Manage the budget

With high net worth individuals comes high expectations. Extra thought and care must be taken with budgeting and

cost estimates in order to ensure that costs don't begin to spiral out of control. There may also be additional relocation costs and remuneration elements that need to be factored into the budgeting equation.

Be clear on requirements when communicating with service partners – ask them to scope the project fully and commit to a budget for their support and services, as this will minimise additional charges and approval requests later on.

Resource carefully

The calibre of your service partners is hugely important. They must be experienced and fully accountable. Credibility, sound judgement and flexibility are key.

Ensure clear roles and responsibilities

There should be clear lines of responsibility both within your organisation and with specialist service providers. If you are engaging multiple vendors, make sure that each identifies a clear point of accountability – a senior and experienced individual within their organisation who can assume full responsibility. Clarity of roles and responsibilities will help avoid situations where something is missed because two parties each believed that the other was dealing with it.

Create a timeline

Ensure that your specialist providers are aware of deadlines and key dates, and that any changes are communicated clearly to them.

Conduct regular progress reviews

Ensure that communication channels are always open and schedule regular progress reviews with your team and your vendors. This will allow you to keep a handle on deadlines, targets and costs.

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Outsourcing & service partners

To meet the resource challenges that a business-critical move presents, you will likely need to outsource certain components. But which areas should you consider outsourcing?

Financial and tax

A business-critical assignee's financial affairs tend to be very complex.

Immigration. It can be very difficult to keep a handle on risks, costs and compliance.

Relocation and household goods.

A local provider comes with the local knowledge which can shift a move from being acceptable to being exceptional.

Specialist services.

High net worth assignees often require niche services such

as the movement of a wine collection or the installation of a chandelier. Such collections/items have huge monetary value and cannot be put at risk through inexperience and lack of specialist equipment.

Once you've decided which areas you wish to outsource to experts, you must then begin the process of selecting your service partners.

Before you begin, be aware that it is often not the range of services that is most relevant to the success of an assignment, rather the method of service delivery. Delivery should be customer-focused, flexible and proactive. Effective and timely communication is essential. A standard provider who is used to delivering formulaic, high-volume services may not have the experience required to manage a much more complex business-critical move. In this way, providers should be selected based on their ability to offer specialist expertise. Determine this by evaluating level of specialisation, track record, experience, responsiveness and level of decision-making authority.





Given the newsworthy nature of many business-critical relocations, how do you go about ensuring confidentiality?

Non-disclosure agreements

Consider having key people - both internal staff and specialist providers - sign an NDA prior to commencing work on a move.

Discretion

Ensure that everyone working on the project uses discretion. Conversations and meetings should always be held confidentially. Discretion should also be applied when delivering services such as home searches, the processing of immigration papers, and household goods moves.

ISO 27001 data protection best practices

All parties concerned with the move should follow the strict confidentiality practices which form part of the ISO standards. The practices relate to how sensitive information is collected, processed, stored and shared. For example, individuals working on the move should consider where they are sitting and how visible their screen is to others. They should be aware of what they share via email, as well as who they share it with. And they should never forget the risks associated with holding personal data on unprotected laptops.

PR contingency planning

You should have the ability to manage any information leaks immediately, efficiently and effectively. Are your legal, PR and social media capabilities sufficient?

Security and duty of care

The level of personal security risk associated with a business-critical employee tends to be much higher than that of the general assignee population. For example, when moving to a hardship location there may be a risk of kidnapping or increased security threats to the assignee's home.

Consider what security measures you will provide and to what extent the security considerations will be integrated with the broader relocation requirements and processes.

Equally critical is having the right insurances in place.

Consider insurance for health and medical, high value personal effects, evacuation and kidnapping. In addition, ensure that you develop robust contingency plans - e.g a disaster recovery plan - which will enable you to manage the situation effectively should things go wrong.



Communication and responsiveness

For business-critical assignments, being readily available to all parties but particularly the assignee is essential for a successful and smoothly executed relocation. In addition to 24/7 telephone and email support, you should consider the seniority of your internal decision-maker - do they have sign-off authority and thus the ability to keep things moving? A preferred option may be to outsource to an experienced provider who is able to deal with all requests and issues in an expedient manner.

Communication

Effective communication is key to the success of a business-critical assignment. You must be aware of and respect the assignee's communication preferences, plus be able to constantly negotiate the balance between too much or too little information, too much or too little interaction. You will almost certainly find yourself working with the assignee's Executive Assistant - the relationship that you build with them is equally as important as the one that you build with the assignee. Equal consideration must be given to the

way that you communicate with the other stakeholders involved in the move. Take time to build a relationship with key contacts, be flexible as regards their communication preferences and ensure that they know exactly who to turn to should they encounter an issue.

Good communication will allow you to identify potential issues ahead of time and actively gauge levels of satisfaction.

To establish a strong communications function, you will need to consider the following...

Assignment co-ordination

Who within your team will assume ultimate accountability?
Who will be responsible for a particular area, a particular aspect? Will the communications channels that you use internally be the same as those that you operate externally?
Email may be the preferred internal comms channel; executives may prefer face-to-face meetings.



The assignee's family

Ensuring the happiness of the assignee's family is crucial to the success of a business-critical relocation. The family should be provided with the same support privileges as the assignee. This will allow them to push forward with activities like school searches, which will help streamline their transition into the new environment.

Service providers

If you have several external providers, define how you will co-ordinate communications with each. Consider how service providers should communicate with the assignee. Should there be any direct contact? If direct contact is necessary, how can this comms stream be managed?

Regular feedback with your VIP

This is essential in order to gain and maintain a clear understanding of assignment progress and assignee satisfaction levels. Feedback should be shared in a timely manner with both your team and your service providers.

The amount, the type and the depth of the feedback that you seek for a business-critical move should sit several levels above that sought for a classic assignment do you have the capacity to obtain, collate and respond to this level of feedback?

Response times

Responses must be swift, succinct and accurate. Delayed responses, lengthy instructions/explanations and misinformation will frustrate the assignee and may compromise the success of the move.

Post-assignment feedback

Business-critical moves present an opportunity to raise the profile of the HR and global mobility functions within your organisation. Request written feedback from the assignee – what value has their relocation provided, both for them as an individual and for the business as a whole? Use positive feedback to explain/underline the importance of the HR and global mobility functions. This can lead to a stronger integration of these teams within the business, plus highlight your mobility programme as an area worthy of further investment.

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Taryn Whitfield

Head of Advisory
K2 Global



5. Ensuring success: five key considerations

Executive, business-critical or VIP relocations will typically fall outside of an organisation's standard global mobility protocols.

Such assignments are less common and for some organisations unique. In most cases, due to the business-critical nature of the assignee, they require an extra level of support and attention to detail, and bring with them heightened expectations and greater risks.

When planning for a business-critical assignment, make sure to do the following:

1. Think beyond the relocating employee

The welfare and happiness of the assignee's family is key to the success of a business-critical relocation. What are they going to need and can you anticipate those requests? Do

they have realistic expectations and if they don't, how can these be diplomatically and empathetically managed? Always bear in mind that for the purposes of the assignment, the family are an extension of the assignee themselves.

2. Plan for quality and quantity of resourcing

A strong and trusted team is an essential component of a business-critical move. Such a team has the ability to mitigate risk, negotiate challenges and prevent the assignee from becoming embroiled in the distracting logistics of the move. Within the business, you may not have the capacity or the skillsets required to manage the assignment, so careful outsourcing will be required. External providers must become a part of your strong and trusted team, communicating effectively and taking accountability for various aspects of the move.

3. Understand that there is much more to a move than mere logistics

Service delivery is critical to a successful business-critical move. It is not just about moving an assignee from A to B. It is about providing a truly positive experience for the assignee, one which involves their family being happy, their work being undisrupted by logistical concerns, and their integration into the new environment being as seamless as possible.

4. Manage the pressure, make the most of the opportunity

Business-critical assignments tend to come hand-in-hand with increased pressure levels. This pressure needs to be managed to protect both wellbeing and quality of service. Though increased pressure levels can be unpleasant, with high risk comes high reward: business-critical relocations can present HR and global mobility functions with the opportunity to further demonstrate their strategic value to the business, leading to greater senior-level visibility.

5. Set realistic expectations

However experienced your team and however well you plan and prepare, unexpected issues (strikes, customs inspections, medical issues etc.) can occur, impacting timing or lead to a change of plans. Set the right expectations that sometimes things will happen which are out of everybody's control, however they should also be reassured that your team is experienced and agile enough to tackle unexpected challenges swiftly and successfully.





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Whether you wish to build a business-critical programme from scratch, or simply evolve/extend an existing programme, our experienced specialists are here to help.

To get started, contact Daniel Natoli,

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