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**RES FORUM**

# Expatriate Mentoring: Maximizing the benefits of mentoring and knowledge transfer within Global Mobility

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## Quarterly Report December 2018



**Authored by**

**Prof. Dr. Benjamin Bader** | **Katherina Schulz, BA**  
Professor of Strategic Management and Organization | Research Assistant  
*Leuphana University of Lüneburg Germany*

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# Contact

The RES Forum cooperates with the Leuphana University of Lüneburg. The main goal is to enhance the practical perspective of the RES Forum with a more academic research approach. We aim to match the understanding of pressing issues in HR management with research expertise in order to achieve academic thought leadership in the field of global HR management.

## The RES FORUM

T +44 20 7127 8075  
E [office@theresforum.com](mailto:office@theresforum.com)  
[www.theresforum.com](http://www.theresforum.com)

## About The RES Forum

The RES Forum is an independent, highly engaged and international community of senior in-house International Human Resources professionals with more than 1600 members in over 45 countries. We are not influenced by external parties or third-party vendors. We share information to make our working lives easier and to assist in solving difficult work challenges. We collaborate on shared projects and initiatives, and we learn together. Our agenda, set entirely by our membership, is delivered through a spectrum of services including member information exchange, custom research, professional consultancy and training and a full schedule of events held around the globe.



## Prof. Dr. Benjamin Bader

Professor of Strategic Management  
and Organization  
*Leuphana University of Lüneburg*  
Strategic Advisor to The RES Forum  
T +49 4131 677 1950  
E [benjamin.bader@leuphana.de](mailto:benjamin.bader@leuphana.de)



## Katherina Schulz, BA

Research Assistant  
*Leuphana University of Lüneburg*



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**SIRVA Worldwide Relocation  
and Moving**

Trevor Janes, Vice President,  
Business Development  
**T** +44 77 8740 0960  
**E** trevor.janes@sirva.com

[www.sirva.com](http://www.sirva.com)

**About SIRVA**

SIRVA is a leading provider of outsourced mobility services, partnering with corporations to relocate their staff globally. SIRVA offers an extensive portfolio of mobility services across approximately 170 countries, providing an end-to-end solution and delivering an enhanced mobility experience in addition to programme control and security for our customers. SIRVA has a portfolio of well-known and recognizable brands including Team Relocations, Allied, NorthAmerican, SMARTBOX, and Allied Pickfords.



# Introduction

Sending employees to work in overseas subsidiaries has become day-to-day business for many multinational corporations (MNCs). Indeed, for some leading organizations, the opportunity for employees to be globally mobile is included as a part of their organization's Employee Value Proposition (EVP), helping them to attract and retain the best talent (RES Forum, 2018). Whilst MNC's are making great strides to control costs by reformulating reward packages and monitoring costs, it continues to be the case that international assignments in any form are not cheap for organizations. (RES Forum, 2017). While numbers vary greatly, it's generally accepted that an average expatriate costs two to three times more than an equivalent local hire would cost. Such a significant spend makes it critical for organizations to monitor the success of assignments and the consequential return on investment for the organization.

It's a well-recognized fact that assignment failure can result where the expatriate or their family fails to adjust to their host country and overcome the challenges that their new life presents. The challenges that the expatriate faces as they need to adapt to life outside of work, yet be fully functioning and performing in their new role at a high level, are well documented. In itself, there is no problem with setting this expectation of often highly skilled, well paid experts who were well aware of the challenge that they signed up for. Organizations, however, can ease the pain for newly relocated expatriates by providing pre-departure inter-cultural training programmes or language classes.

Another, perhaps less utilized yet highly successful way to support employees is by providing them with a mentor. A mentor with a shared cultural experience with the expatriate can address and alleviate the difficulties international assignees often face abroad from a "human perspective". It has been shown that mentoring improves, amongst other things, the career commitment and job satisfaction of employees (Allen et al., 2004). It improves the relationship between the employee and the company, and many mentees testify of the support that a mentor provided to them in the first weeks and months

following their arrival on assignment. It is fair to assume that mentoring generally has a positive impact upon the success of international assignments.

Generally speaking, a mentor is a person with advanced experience and knowledge who is willing to support and develop his or her mentee. What distinguishes mentoring from other types of personal relationships is that it is bound to the organizational context. There are two ways in which mentors help their mentees. Firstly, mentors may facilitate the mentee's career advancement, for example by coaching them and increasing their visibility within the organization. Secondly, mentors contribute to the mentee's personal growth and self-worth, for instance by offering confirmation and friendship and by acting as a role model.

In the international context, mentoring is a bit more complicated, mainly due cultural challenges. Organizations who seek to support their expatriates with mentors face an array of questions, including whether they should provide their expatriates with a mentor from the home or host country. Choosing a home country mentor might ensure there are no intercultural differences between mentor and mentee, and it may facilitate the intra-organizational knowledge transfer across country boundaries. However, the mentor might be less suitable in helping to overcome cultural challenges in the host country. A host country mentor would resolve this issue, however, there may be severe intercultural challenges between mentor and mentee.

Additionally, organizations have the challenge of deciding how mentors and mentees should be paired. Should the organization assess personality characteristics, family situations, or job roles for a best match? Or should the match be based on the host country of the assignment? Whilst the idea of pairing mentors may sound simple, a closer look reveals the many challenges and pitfalls it can present.

Whilst the Global Mobility professionals from the 33 organizations who took part in our survey provide extremely valuable and comprehensive input about

mentoring schemes and processes in place within their companies, theirs is only one side of the story. This study is unique in the field of GM in that the other side of the story is told by the expats themselves. This unrivalled study takes into account the information and opinions of the 491 participating expatriates who are working on international assignments all over the world. Only expatriates themselves can truly provide HR professionals with information to draw conclusions about how best to maximize the benefits of their mentoring programmes for international assignees, and we are delighted to be able to include such a rich data source as the basis for the research for this report.

In particular, the report highlights the pros and cons of home vs. host country mentors and provides insights into mentor selection and pairing. Finally, the report delivers a toolkit that guides companies in developing and tailoring their mentoring programme, thus providing a complete, step by step approach to planning and implementing an effective mentoring programme.

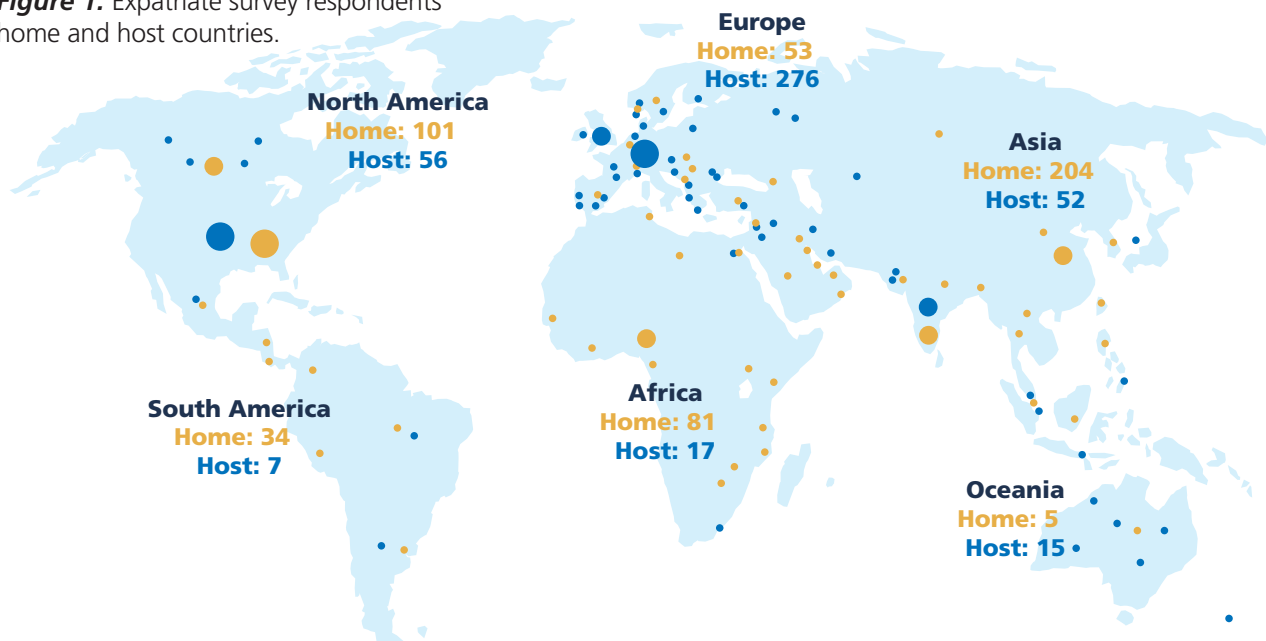


# About the Respondents

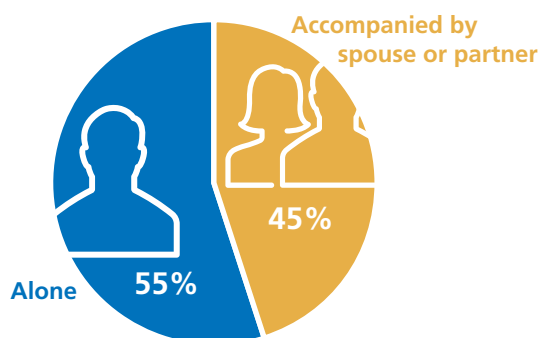
491 expatriates took part in our survey, and of those, 60% were male. Over half of the responding expatriates (54%) went on assignment alone, while the remaining 46% were accompanied by a spouse or partner. Of those expatriates who went abroad alone, 60% were single and 40% had a spouse or partner who stayed at home. There were representatives from all over the world but most of them were originally from European countries, as Figure 1 illustrates. The average expatriate in our survey is 39 years old and, at the time of the survey, had spent about two years in the host country.

Additionally, in a second survey, a total of 33 GM professionals shared their views on mentoring programmes for international assignees. Respondents are distributed throughout the globe, with half of those professionals working in organizations headquartered in the EMEA region (Europe, Middle East and Africa). The headquarters of the remaining GM professionals are spread across the Americas (44%) and the Asia-Pacific region (6%).

**Figure 1:** Expatriate survey respondents' home and host countries.



**Figure 2:** Accompanying Family?



**Figure 3:** Average months spent in host country by responding expats.



# About the Mentors

In order to draw conclusions about the value or otherwise of a mentor to international assignees, it is of course necessary to compare a sample of expatriates who have had a mentor during their assignments with a group of expatriates who have not.

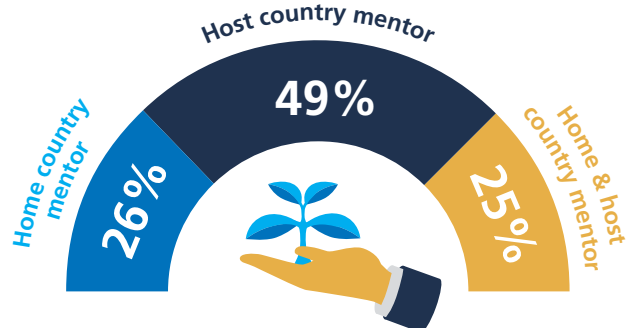
In total, 196 expatriates indicated that they have a mentor, which accounts for 40% of respondents. About half of those expatriates with a mentor had a host country mentor, while 26% had a home country mentor. A further 25% had both types of mentors. For a little over half of the expatriates, the relationship with

their mentor was formally initiated, (an organizational mentoring programme). The others reported that the mentoring relationship was informal, i.e., not initiated by the organization. In terms of hierarchy, most expatriates had a mentor who was three or four levels above them, making them a step-ahead mentor. There was an equal distribution of the remaining expatriates' mentors between peer mentors (up to two levels above) and senior mentors (over 4 levels above), see Figure 4. Only one out of every four expatriates had a female mentor.

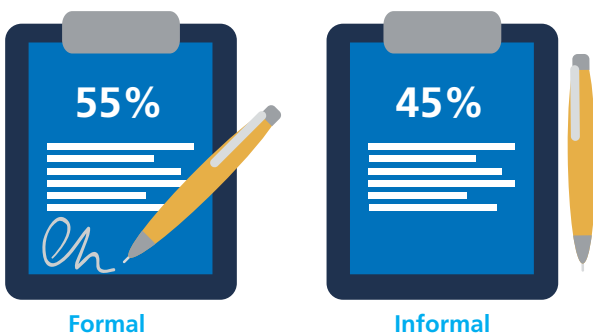
**Figure 4:** Mentor's managerial level.



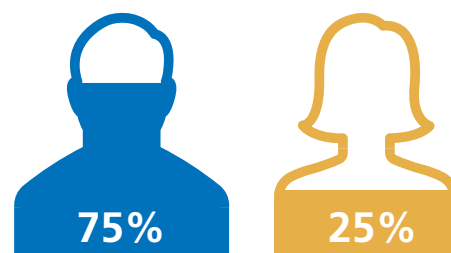
**Figure 5:** Mentor types.



**Figure 6:** Formality of mentoring relationship.



**Figure 7:** Mentor gender.



# Our Key Insights: Importance of the Mentor Type

Our research demonstrates that home country mentors have a stronger positive effect on expatriates' well-being than host country mentors.

In the international context, an organization needs to decide whether an expatriate should be provided with a home or a host country mentor. Both types of mentorships are likely to have beneficial effects. While home country mentoring enables the expatriate to stay connected to the home unit, host country mentorship facilitates access to a network abroad. There is, however, one potential downside of having a host country mentor, namely cultural barriers.



Our study results showed that both home and host country mentorships have a positive effect on expatriates' well-being, however, the effect is noticeably stronger for home country mentorships.

That does not mean host country mentors are not a good thing though, simply that they offer other benefits. Of course, expatriate well-being is not only a key factor for performance abroad, but is ultimately also a key factor in overall assignment success. The positive impact of home country mentors can be explained as this can help to increase the expatriate's sense of commitment to the organization by enabling them to stay in touch with the home unit. Mentors can also offer important career support, by preparing expatriates for key challenges or by reducing unrealistic expectations about working abroad.

As one Global Mobility manager in a large professional services firm wrote, "the mentor helps the mentee take control of their career advancement through the provision of advice, guidance, support and asking insightful, sometimes challenging, questions." The surveyed GM professionals also propose that home country mentorship

has a positive impact on repatriation. Tina Lim, Global Mobility Consultant based in the APAC region at Micron Technology Inc. points out that mentoring "speeds up the process of integration (of the returning assignees) in a new organization or work role and this in turn improves the retention rate".

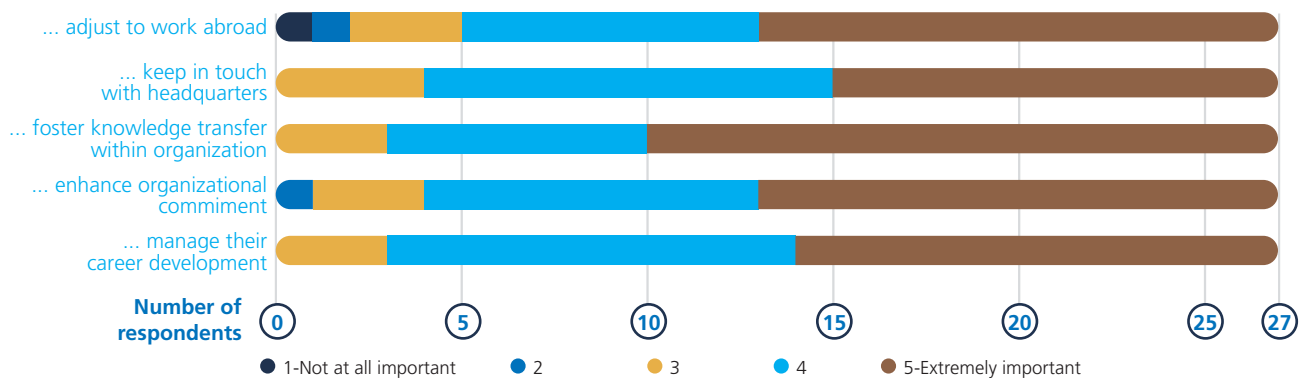
For the organization, home country mentorship has another distinct advantage; it can foster intra-organizational knowledge transfer. In this regard, home country mentors can be particularly useful as they foster the transfer of knowledge from the expatriate's host country to their home country. According to the GM professionals who responded to our survey, the improvement of intra-organizational knowledge transfer is the most important feature an international mentoring programme should have, as is illustrated in Figure 8. One GM manager indicated that knowledge transfer is facilitated by "[creating] networks, bringing people together, [and] [...] translating knowledge to current host procedures/understandings". Mala Cornell, Global Mobility Manager at CPP Investment Board, based in The Americas region, remarks: "Getting things done in one region is not necessarily how things are done in another." Therefore, mentors promote knowledge transfer, "by providing guidance and insights into how locations differ in terms of decision making, communication etc."

In addition, many GM professionals mentioned that mentoring facilitates the sharing of ideas, best practices and general organizational knowledge globally. They are convinced of the benefits mentoring can provide to successfully transfer knowledge within the organization.

Additionally, home country mentors may be able to provide expatriates with cultural support by providing a link between the home and host country culture and therefore helping the expatriate to adjust to the foreign environment. This may not be because their mentor is an expert in the host country culture but rather because they are an expert in "adapting," often because they have been an international assignee themselves and can therefore provide their mentee with advice and support.



**Figure 8:** GM Professionals’ responses to the question “In your opinion, how important are the following elements of a mentoring programme? A programme should support the assignee to...”



GM Professionals note that a key benefit of expatriate mentoring is that mentors help expatriates to set expectations and to better prepare for an international assignment. Mentors facilitate expatriates’ adjustment to the foreign environment because, as one Global Mobility Manager states, they give “confidence to the younger assignee with regard to the demands of their international assignment” and they provide, “a sense of comfort to the assignee, leading them to feel that they are well supported by the company.”

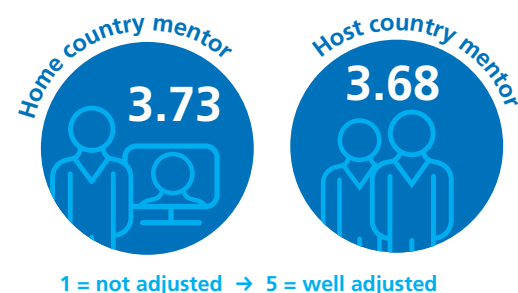
Research has shown that the inability to adjust to life in the assignment location is one of the primary causes of assignment failure, i.e. ineffective expatriate performance or the premature termination of the assignment. As such, we also wanted to investigate the relationship between mentor type and expatriate adjustment to the host environment. As Figure 9 illustrates, our results show that home and host country mentorships are almost equally beneficial to the expatriate’s ability to adjust to life in the host country.

Evidently, both home and host country mentorships have different advantages and improve the well-being and adjustment of expatriates in different ways. Nevertheless, the positive impact of host country mentorships on the well-being of expatriates is not as strong as in the case of home country mentorship. This may be linked to cultural differences, barriers and communication problems between mentor and mentee which may diminish the positive effects of a host country mentor for the assignee.

“In instances where the intent is to repatriate the employee to the home location following the assignment term, a home country mentor may provide an additional link that facilitates reintegration at repatriation, and may provide opportunities for the employee to recognize how to best leverage the knowledge and experience gained during their assignment upon return.”

**Trevor Janes**  
Vice President,  
Business Development  
SIRVA Worldwide Relocation  
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**Figure 9:** Expatriates’ adjustment in relation to the mentor type.



# Formal vs. Informal Mentorship

**Formal mentoring programmes are no better than informally initiated mentoring relationships, however, when formal mentoring programmes are utilized, development and implementation must be well-executed.**

Evidently, organizations must decide whether to provide their expatriates with home or host country mentors. However, many mentoring relationships are informal, self-initiated ones where the organization has no influence. Informal mentoring occurs naturally when mentors and mentees bond with each other and the mentor decides to take the mentee “under their wing.” The mentor may recognize him or herself in the mentee while the mentee may wish to acquire qualities that the mentor displays in their work. Although research shows that informal mentoring exists in almost every organization, only 71% of the GM professionals that we surveyed indicated that they are aware of informal mentoring relationships in

their company. Those who are aware state, for example, that new assignees often reach out to former assignees prior to an assignment to better understand the personal and family implications of an assignment. Kendra Martin, Global Mobility specialist, based in Canada, at Shawcor Ltd., stated that “senior leadership and management definitely share informal relationships with different individuals.” This also includes “providing guidance on career, how to approach conversation and how to navigate the organization.” However, not all expatriates have the opportunity to develop informal mentoring relationships and in such cases, formal mentoring programmes which are initiated by the organization can certainly be helpful.

One potential drawback of formal mentoring programmes is that matches are generally made by Human Resource Departments rather than by personal choice. It is difficult to say which of the two is more successful, and while some GM professionals suggest that HR or GM should determine matches, others prefer voluntary pairings. Holly Clontz, Manager, Global Talent Mobility Solutions, at Ingersoll Rand, based in The Americas region, suggested



that matches could even work in the same way as popular dating sites where (potential) mentors post about their experiences, and interested mentees select them. This is certainly a creative way to manage mentoring relationships that could work well in large organizations.

Of course, where relationships between mentor and mentee are artificially forged by HR departments or managers, there is always the potential for problems as the parties simply may not get on. They may consequently be less willing to invest their time and energy into the mentoring relationship, and therefore fail to benefit from the opportunities that it can present. This situation can be made even worse where mentoring programmes are compulsory rather than voluntary. It is therefore essential to consider potential issues and to ensure that any programme is well set up to minimize these risks.

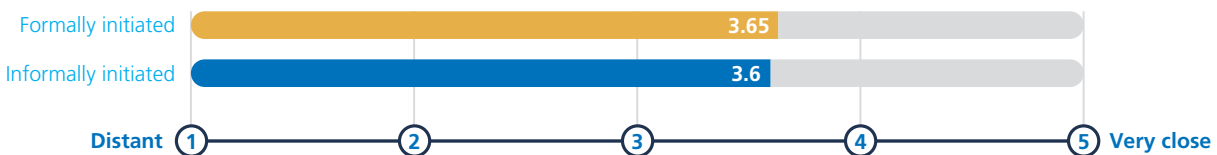
That said, formal mentoring has a significant advantage over informal mentoring for organizations, simply because the organization can only exert a controlling influence over the relationship if it is aware that the relationship exists. As one GM Professional commented: "I think it is important for HR to lead the way, but functional groups within HR, e.g. Mobility, can manage relationships with specific goals such as overall assignment experience."

An additional consideration is that formal mentoring programmes can have the effect of positively promoting the idea of informal mentoring throughout the organization by changing the company culture. When an employee realizes that mentoring is meaningful to the organization, it has the potential to become meaningful to them too.

Whilst both informal and formal programmes have their relative advantages and disadvantages, the results of our own survey do not show that one is more beneficial than the other, with expatriates in both types of programme reporting that they feel the same level of closeness to their mentor (see Figure 10). However, it should be noted that we were only able to observe mentoring relationships that are still in existence, and informal relationships that did not work out well cannot be tracked, unlike those in a formal programme which can be tracked and reviewed.

Organizations should carefully consider their goals and objectives before deciding on the type of mentoring programme to establish. The toolkit at the end of this report provides advice and guidance.

**Figure 10:** Mentor closeness in relation to the formality of mentoring relationship.



# The Role of Personality

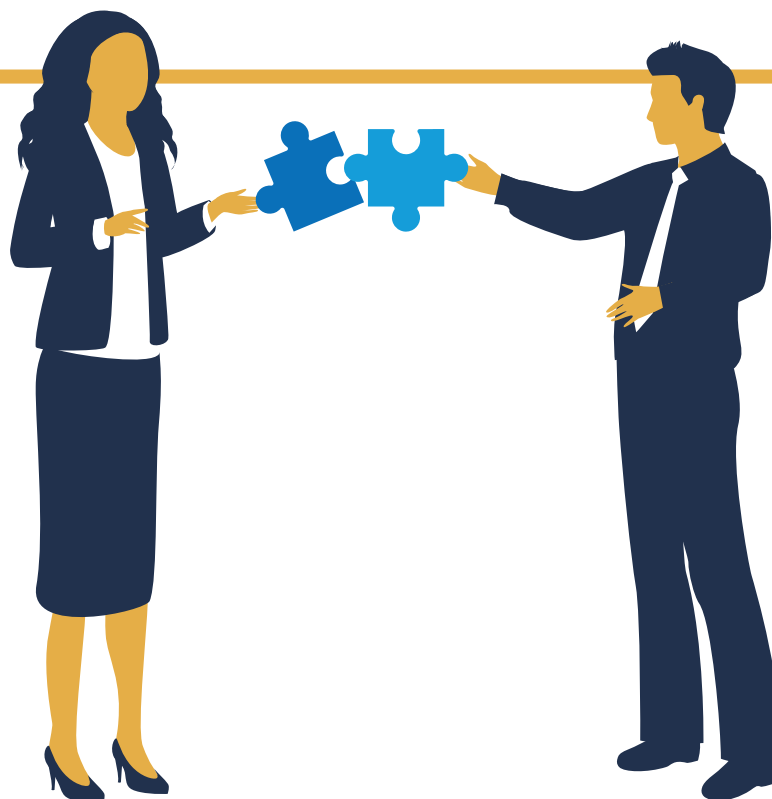
**In order to unlock the full potential of a mentoring relationship, the chemistry between mentor and mentee must be right.**

When it comes to relationships, compatibility of personalities is a key determinant of successful and fruitful interaction. Transferred to mentoring relationships in the international context, there is no “perfect” mentor or mentee personality match. However, there are better (maybe perfect) and worse matches. Of course, certain personality traits, like empathy, can be advantageous, but what ultimately determines a successful mentoring relationship is fit between mentor and mentee.

Mentoring in international assignments is further complicated by the cultural component, as different cultures expect different cultural behaviours. In Western societies, for example, the personality trait extroversion is favoured as it is associated with assertiveness and

strong communication skills. Accordingly, an extrovert would be considered suitable for being a mentor. An introvert, however, can be an equally effective mentor if the expatriate is rather introverted, as the mentor may recognize potential difficulties more readily.

A common, shared experience between mentor and mentee concerning an international assignment is certainly beneficial. Accordingly, an excellent mentor for an expatriate would be someone who has spent some time abroad him or herself as well. This view is also shared by the GM professionals who took part in our survey. More than 60% stated that employees enrolling as a mentor for expatriates should have international work experience themselves, with some going so far as to suggest that country/region should be considered. The core benefit of expatriate mentoring is nicely summarized by Mala Cornell, Global Mobility Manager at CPP Investment Board, based in The Americas region, who wrote that “support from someone who has been through a similar experience offers a different perspective that mobility departments and vendors cannot provide.”



# A Toolkit for Expatriate Mentoring

Mentoring relationships have benefits for all parties involved. While mentors have the opportunity to share their knowledge and give back to their mentee and the organization, mentees can profit from their mentor's experiences and support. Because of the direct interpersonal exchange, mentor and mentee can capitalize on their interpersonal skills and self-confidence. For organizations, mentoring facilitates career development as well as employee engagement and retention. It is relatively cheap, compared to formal trainings.

With regard to international assignments, mentors can assist expatriates in overcoming the difficulties they may face abroad, thereby helping them to improve their performance at work. According to the GM professionals responding to our survey, mentoring helps assignees settle more quickly into life in the host location and enables

them to understand the culture of the host community in a way that formal training could not deliver, consequently improving assignment success rates.

Additionally, home-country mentors in particular, serve as a link between the expatriate and their home location, facilitating the transfer of knowledge, for example by sharing of best practice and keeping the expatriate focused on the wider organization.

So how should an expatriate mentoring programme be designed in order to reap the greatest benefit of mentoring? The following toolkit can be adapted to your organization and provides a step by step approach to planning and implementing an effective mentoring programme.



## 1. Define the goals and the success factors of your mentoring programme

**“If you don’t know where you are going, you will probably end up somewhere else.”**

Mark Twain, American novelist and lecturer  
1835 - 1910

Before designing (or refining) a mentoring programme, clearly define the goal(s) and success factors (i.e. KPI’s). Make sure that you know:

- What the objectives of your mentoring programme are
- How you will measure the success of the programme

By linking the goals with KPI’s, you can help key leaders to recognize the benefits and strategic value of the programme, and you will be able to monitor and evaluate the success of your mentoring programme.

Define programme parameters, such as partnership length, frequency of meetings and rewards. While some GM professionals propose a programme length of between six months and two years with bi-weekly or monthly meetings, others feel that most parameters should be presented to and agreed by the participants themselves.

Ask participants to sign a mentoring agreement that defines length, objectives, focus areas, non-disclosure and rules of cooperation at the start of the relationship. This helps to enhance commitment and set expectations.

## 2. Aim to attract voluntary participants

Bear in mind that it is particularly useful to provide expatriates with a mentor who has international experience themselves. Willingness to teach and willingness to learn is a fundamental prerequisite for the programme to be successful, so participation should be voluntary.

Allow formal applications to the programme, but also

enable leaders to nominate potential employees as mentors and mentees. Ensure that nominated individuals do have the option to opt out if they wish.

Attract more senior and experienced employees who may have less time available to act as mentors within the programme by convincing them of the advantages of participating in the programme. Benefits may be personal and organizational.

## 3. Match mentors and mentees appropriately

An effective mentoring relationship depends on a good match between mentor and mentee. Based on the goals of your programme and your organization’s size and structure, decide whether participants should be able to choose their mentor/mentee or whether they should be paired by the organization.

Consider matching things like personal values and career goals as well as personality. GM professionals that responded to our survey suggested that the following should be considered: mentee objectives and mentor experience, personal fit, and area of expertise/interest.

Previous international experience can also be an important characteristic for mentors. Initial questionnaires followed by more detailed review of potential participants can help in matching participants.

Consider country location for expatriate mentors. In terms of long-term career goals of the assignee and knowledge transfer after repatriation, it may be more beneficial for expatriates to have a mentor from their home than from the host country. A home country mentor, ideally one with international experience in the country the expatriate is going to, would be a good choice, and the hope would be that the mentoring relationship will still be in place when the expatriate returns.

GM professionals who responded to our survey believed that home country mentors not only help the expatriate to better prepare for an international assignment and manage expectations, but also enable them to feel more connected to their home country ahead of their repatriation. Additionally, a mentor who has experience of working in the host country can help to set expectations and help the assignee to settle quickly into the host location.

Home country mentors with experience of working in the host location can have multiple benefits in that they can facilitate knowledge transfer, maintain contact for the assignee between home and host country, help the assignee to adjust to life in the host country, and facilitate

reintegration upon repatriation, by enhancing employee experience and aiding with talent retention.

Organizations may also consider providing mentors for accompanying family as well as the relocating employee, where this seems appropriate.

**Trevor Janes**  
Vice President,  
Business Development  
SIRVA Worldwide Relocation  
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#### 4. Train and guide mentors and mentees

Train programme participants about the general mentoring process, participants' roles and the goals of the programme. Mentors and mentees should also be encouraged to discuss their expectations and individual objectives. The goals of the individual mentoring relationships as well ways to reach these objectives should be agreed upon at the beginning of the relationship; this is key to ensure that the programme is a success. Although it may have its (limited) benefits, a relationship based on nice chats and coffee breaks is a waste of potential!

GM professionals in our survey recommend providing mentors and mentees with written guidance and materials to refer to, in order to help guide the relationship. Assign an additional person to oversee the relationship to ensure that participants stay on track and in line with the programme and relationship objectives that have been set. This may be the programme administrator who also provides resources and shares tips and best practices, and regularly checks on progress with participants.

#### 5. Evaluate your mentoring programme

Evaluate your programme before you launch it and make any changes, and then continuously evaluate each mentoring relationship, as well as the programme overall to ensure that it is effective and that it meets the goals that you set.

Consider also evaluating things such as participants' perceptions of the programme and the value they place on it, and the effect the programme has had on participants, (perhaps using pre- and post- programme self-assessments).

Find out what participants like and what they don't like about the programme with the help of open-ended questionnaires, interviews and written reports. Act on the participants' suggestions for improvement and make amendments to the programme whenever it does not achieve the goals and objectives set, to ensure that the most value is gained from the programme by all participants.

Both expatriates and GM professionals alike who took part in the surveys agreed on one thing; there is significant value for international assignees by creating a well-managed and well-orchestrated mentoring programme, for mentor, mentee, and for the organization as a whole.

# How to plan and implement an effective mentoring programme:



Allen, T. D., Eby, L. T., Poteet, M. L., Lentz, E., & Lima, L. (2004). Career benefits associated with mentoring for protégés: A meta-analysis. *Journal of Applied Psychology, 89*, 127–136.

RES Forum (2017). *The New Normal of Global Mobility – Flexibility, Diversity & Data Mastery*. Written by Michael F. Dickmann. *RES Forum, Harmony Relocation Network and Equus Software, Chapter 5*

RES Forum (2018). *The Employee Value Proposition and Global Mobility: Driving Competitive Advantage through global opportunities*. Written by Benjamin Bader and Marie Oldenburg.





# LEARNING LAB RES FORUM

INNOVATION ◦ EDUCATION ◦ PARTICIPATION

## RES Forum's Brand New Virtual Education Programme

Developed in partnership with Knowledge Anywhere, to help GM Professionals become experts in Global Mobility (GM), the curriculum covers the following aspects of Global Mobility and International Relocation:

- Mobility overview
- Assignee journeys
- Employee compensation
- Compliance

Each module includes an assessment to ensure understanding and drive engagement.

For participants who want to take their Learning Lab experiences to the next level, 'RES Accreditation' is a valuable supplementary part of the programme, assessing and providing formal recognition of the knowledge you have acquired on completion of the Learning Lab programme. As part of the supplementary accreditation you will be measured on application of your learnings from the programme with respect to a challenging but real life GM case study.

### Training for Internal & External Teams

The course is designed for, in-house GM and HR Support Functions and in-house Shared HR Service Centres, International Relocation Services Suppliers. Although pitched at entry level, the course is far from basic – in fact some of our most experienced members failed the tests (we promised to not share any names!)

What participants learn Participants will obtain a better global understanding of processes, and their roles and responsibilities within them:

- Improving understanding of the relocating employee experience throughout the process
- Enhancing overall skills, technical knowledge and understanding of best practice
- For vendors in the mobility value chain, better understanding of the voice of the customer, to help improve client relationships

### The course examines mobility from the assignee

perspective therefore enhancing the users' understanding of the employee experience, as well as technical areas of compensation and compliance. It also provides a cost-effective solution for specialist subject training on the complex area of Global Mobility.

### RES Accreditation

RES Accreditation is the industry benchmark in taking HR and GM professionals beyond the basics of Global Mobility management and allowing them to demonstrate their understanding of mobility and HR concepts in practice.

The RES team send candidates a mobility case study and require that they prepare a recorded PowerPoint (including audio) or a video presentation, which builds upon the knowledge acquired through the Learning Lab. The presentation is then sent to our qualified assessors, who are, without exception, current or previous Heads of Reward or Global Mobility.

The assessment will result in either pass or fail – with a pass rate of around 70%. Successful candidates will become 'RES Accredited Class of 2018' and will receive our logo and business card templates for use on their business cards, their email signature and on their LinkedIn profiles. They will also appear in our public 'Hall of fame', allowing employers and clients to see when accreditation was achieved.

Whether pass or fail, candidates will receive a feedback summary of their submission.



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