

# 2019 ATLAS FORUM RECAPS

## GENERAL SESSIONS

### CALL TO ORDER & WELCOME WITH JACK GRIFFIN

Forum's call to order and welcome began with Atlas Chairman & CEO, Jack Griffin sharing the rich history of Nashville, Tennessee as well as some of the exciting sights and sounds. Not only did he share the information like a seasoned local, he looked the part too--dressed in a cowboy hat, bolo tie and boots! Jack invited attendees to keep Forum's theme, "Moving in Sync," in mind as he touched on Atlas' ever-changing relationships and challenges. Atlas is working hard to "Move in Sync" with their employees, agents, clients and professional van operators as the company addresses industry challenges such as the driver shortage, small shipment demand and "millennial effect." His fun and informative welcome to Music City and the 52nd annual Atlas Forum prepared the audience for a meaningful few days of learning and networking.

### JULIA DHAR

Atlas Forum's first speaker, Julia Dhar, grabbed the attention of all with a powerful talk providing a pathway for everyone to become world-class communicators. Julia is an economist and advises everyone from Prime Ministers to Presidents and CEOs around the world. As an expert in behavioral science, she builds extraordinary teams, high-performing leaders and societies and organizations that are stronger and more inclusive. Julia spoke to attendees on the craft of constructive conflict, detailing how to reach people in innovative ways while bridging divides and allowing others to do the rest. She went on to break down the importance of making space for each party, building a community, and focusing on doing only what you can to navigate business opportunities and challenges. Julia was the perfect guest to start the event, sharing tangible tactics attendees can apply in both their personal and professional lives.

### MELISSA STOCKWELL

Attendees had the honor of hearing from Melissa Stockwell during Forum's second general session. The two-time Paralympian and former United States Army officer shared her gripping story of becoming an amputee after being hit by a roadside bomb while deployed in Iraq, but her story did not end there. Through the adversity and strenuous rehab, she learned to not only live without her leg, but thrive and accomplish more than she had in her years prior. Since the accident in 2004, she has competed on the global stage in swimming at the 2008 Beijing Paralympics and become a three-time Paratriathlon World Champion. She also co-founded Dare2tri, a nonprofit organization that positively impacts the lives of athletes with physical disabilities and visual impairments by developing their skills in paratriathlon. Melissa left attendees in awe of her service, dedication and attitude and inspired everyone to meet hardship with unwavering spirit and dedication.

## JOE BUCK

It's not every day one of your keynote speakers ascends the stage and on a whim requests to sing Johnny Cash's "Ring of Fire" with the band. Fortunately, Joe Buck did just that for guests, and we are certain it will remain a favorite Forum memory for years to come. It was a pleasure to have Buck with us in Nashville, a man known by so many for his unrivaled play-by-play broadcasting for Super Bowls, World Series and more. Instead of going through a rehearsed speech, Buck led an interactive Q&A, giving the audience the opportunity to ask him anything. Everyone was eager to discuss his insights on memorable sports moments, the fate of their favored team and the most timely issues affecting professional sports today. Buck's openness with the audience and quick sense of humor provided the perfect close to an unforgettable Atlas Forum.

## LEARNING SESSIONS

### Fine-Tuning Relocation Policy through the Examination of Research Trends

#### **Moderator**

*Sandy Beyer - Manager of Global Mobility, Salesforce*

#### **Panelists**

*Susan Lay - Senior Relocation Specialist, The Cheesecake Factory*

*Kristen Leggett - Mobility Manager, Belk*

*Michelle Olympia-Boldt - Vice President, Senior Mobility Program Manager, MUFG*

*Ethie Prudent - Domestic Relocation Lead, Cargill Inc.*

Each year the landscape surrounding employee relocation and global mobility grows more complex. Industry research, combined with social and economic data, can provide insight into the factors driving the need for greater creativity and flexibility in policies. In this session, the moderator and panelists utilized Atlas Van Lines' 52nd Annual Corporate Relocation Survey to conduct an interactive team exercise to analyze various relocation scenarios from numerous perspectives and work together to identify meaningful solutions.

Each team was provided a relocation scenario and problem statement based on a question from this year's Corporate Relocation Survey. From there, each team member was assigned a role in the scenario, ranging from transferee to mobility manager to hiring manager and more. Keeping their roles in mind, teams then discussed the issue from all sides and compiled their recommended solutions for the larger group discussion.

Covering timely topics like Brexit as well as consistent relocation obstacles such as family moves, information breakdowns and exceptions, participants rose to the challenge and worked together to identify meaningful relocation solutions that each attendee can consider as they encounter similar scenarios in their day-to-day roles.

## Fine Tuning Relocation Policy through the Examination of Research Trends

### **Moderator**

*Jan LeQuier-Director, Mobility, The Home Depot*

### **Panelists**

*Berna Anderson - Director, Global Mobility, Becton, Dickinson and Company*

*Nancy Carter - Relocation Coordinator, Darden Restaurants, Inc.*

*Johnny Haines - Senior Manager, Deloitte*

*Heather Sheira - Global Mobility Professional, Edwards Lifesciences*

*Teresa Summers - Senior Manager, Administrative Services, Dollar General*

Because we knew it would be a popular session, we hosted it twice! This time around, the session started off with a fun icebreaker mirroring the game show “Match Game.” The moderator presented a question on various mobility and relocation topics while the audience wrote answers and saw how many of theirs matched the panelists. Similarly, each team was provided a relocation scenario and problem statement based on a question from this year’s Corporate Relocation Survey. From there, each team member was assigned a role in the scenario, ranging from transferee to mobility manager to hiring manager and more. Keeping their roles in mind, teams then discussed the issue from all sides and compiled their recommended solutions for the larger group discussion.

This group covered important topics like communication, employee assistance programs and family assistance programs. Once again, participants rose to the challenge and brought forth meaningful relocation solutions that can be considered and put to use in their mobility programs.

## The Voice of Mobility

### **Moderator**

*Eric Halverson - Director of HR Global Mobility, eBay Inc.*

### **Panelists**

*Ann Anderson - Global Mobility Services, Intuit*

*Alex Bautista - Global Mobility Solutions Program Manager, Google*

*Deborah Gaisser - Head of Talent Mobility & Immigration, Genentech and Roche*

*Cheri Martin - Senior Manager, International Benefits, Mobility and Analytics, Slack*

*Andreas Strohschein - Senior Manager, Global Mobility and Immigration, McKesson*

*Vini Valverde - Lead Talent Mobility Consultant, Nike, Inc.*

Six of the industry's brightest minds came together to discuss the hottest topics in relocation: how to ensure your mobility department is viewed as a strategic partner within your company, effective group move preparation and implementation, and building lump sum programs that provide a quality experience for your transferees.

Gaisser and Bautista provided specific insights on how they ensure mobility is viewed and remains a strategic partner to the business. They highlighted the importance of tracking data analytics related to mobility to showcase its impact on business goals and the significant time that should be dedicated to building relationships with transferees to ensure a meaningful and seamless process for both parties.

Higgins and Anderson utilized their time to provide recommendations on building and maintaining an effective lump sum program that provides a quality experience given the current tax environment. They highlighted the use of flexibility in lump sums along with meeting the needs of the employee and budget of a company. Because lump sums are becoming a popular choice for early career talent, they advised on how they are working to inform transferees and provide access to local resources and city guides.

Lastly, Valverde and Strohschein advised attendees on how to properly prepare for and implement a group move. With talent retention at the core of the process, both shared meaningful advice and experiences from their involvement in managing Nike's group move ahead of the Tokyo 2020 Olympics and McKesson's HQ move from San Francisco to Irving, Texas.

## **Around the World in 60 Minutes**

### ***Moderator***

*Debra Frost – Senior Vice President, Global Services, Cornerstone Relocation Group*

### ***Panelists***

*Lillie Castillo – Sr. Director, Relocation, Albertson's*

*Jack Jampel – Senior Manager, Global Mobility, Stryker*

*Michelle Olympia-Boldt – VP, Senior Mobility Program Manager, MUFG*

*Susanne Swayhoover – Sr. Director Shared Services, Sanofi*

Natural disasters. New legislation. Political unrest. Worldwide current events often have a direct impact on global mobility programs. This stellar panel of mobility professionals took attendees to each region around the world to discuss how recent events have impacted programs and left them preparing for the future.

Hot topics such as Brexit, immigration changes, safety, the Mexico border, natural disasters and more have impacted moving and relocation. Panelists took time to address these timely topics

and provided specific examples of how they are implementing relocation policy flexibility and creating new resources and incentives to support global mobility for their organizations.

While company policies, budgets and procedures differ, the constant across panelists was their commitment to getting employees from one place to the next in the best way possible. Similarly, they are all playing a major role in the shift in aligning mobility with talent management and strategic business decisions.

## LIGHTNING TALKS

### **Moderator**

*Ryan McConnell, Vice President, Strategic Planning, Atlas*

### **Lump Sum Payment Considerations**

#### **Speaker**

**Scott Michael – President & CEO, AMSA**

Is your company providing lump sum payments for the right reasons? Are you really experiencing cost savings when issuing lump sums for relocation? Scott Michael spoke to attendees about the important considerations regarding lump sum payment usage, noting education is one of the most important pieces to the lump sum payment puzzle and critical for employees making good decisions when opting for payment and utilizing the funds. As the head of AMSA, he is seeing an increase in fraud and misinformation in the moving marketplace, which is a major issue when transferees are attempting to find the most affordable service providers. To ensure lump sum payments work for everyone, employers should take ownership in assisting employees through the relocation process from start to finish.

### **Managing Relocation Exceptions to Business Needs**

#### **Speaker**

**Kristen Peterson – Domestic & Global Mobility Specialist, Bridgestone Americas**

Kristen Peterson spoke about how managing expectations in business is just trying to minimize exception. In mobility and relocation, what if the business and its integral leaders had a larger say in the process? Kristen suggested to better this process, expand plans to include more decision makers and provide mobility thought leadership with business leaders looped in. When making decisions and looking to your human side, it's important to keep the balance. Don't approve or deny specific relocation requests because of what your business has done in the past or might do in the future, but track the exception by the specific business need.

### **Debunking the Myth of Generational Differences**

#### **Speaker**

**Jim Carroll – Senior Manager, Global Mobility, WestRock**

You would assume people associate themselves with their specific generation for a sense of belonging, right? Thanks to Jim Carroll's data-driven breakdown on generational differences, we now have some answers to consider. Surprisingly enough, the data shows people more often associate themselves with identifiers of numerous generations and fall on a continuum instead of in a box. Generations are more alike than they are different, and not everyone identifies with their assigned generation wholeheartedly. When we focus on what makes us similar instead of different, we can start to appreciate our generational continuums and utilize them to better our personal and professional lives.

## **The Critical Elements of a Group Move**

***Speaker - Dawn Mugavero, Senior Manager of Talent Mobility, Toyota Motor North America***

Imagine waking up one day as a mobility manager and being told your company needs your help in moving thousands of employees to an entirely new company headquarters in Plano, Texas. Dawn Mugavero doesn't need to imagine it--she lived it and helped Toyota execute an unprecedented and successful group move. As she shared with attendees, critical to her team's success were collaboration, communication, resources and connections. The Toyota mobility team embodied these principles throughout every initiative and process to ensure vendors worked together, employees were heard and educated, and families always remained a priority. As a result of their commitment, Toyota experienced a 65 percent relocation acceptance rate, relocating more than 3,200 employees and managing over 2,500 moves.

## **Three Syndromes in the Attention Economy**

***Speaker - Peggy Smith, President & CEO, Worldwide ERC***

Our final presenter helped identify three syndromes critical to the success and evolution of human resources as we navigate today's attention economy. First and foremost, syndrome one was identified as the "headline grabbers," representing the economic and legislative issues of today's landscape that require constant attention and oftentimes mobility policy changes--think Brexit, immigration and Amazon HQ2. Syndrome two, the "whale syndrome," was described as "things that can bite you," meaning business models are changing and mobility must be a part of the conversation and decision making at the highest levels of leadership. Finally, syndrome three can best be described as "the things you miss might kill you." Given the global talent shortage, the move away from traditional employment models, and so many other industry-impacting changes, mobility professionals must innovate and find ways for their programs to stand out.