How Technology Impacts Global Mobility

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Agenda

- Introductions
- Usability of Global Mobility Technology
- Panelist introductions
- Panelist speakers
- Conclusion, Question & Answer session
Usability of Global Mobility Technology – a changing generation
Millennial use of Technology

66% follow at least one company on social media
- University of Massachusetts

2 in 3 executives under 25 are frustrated with the technology available at work
- BT/Avaya research, Feb. 2014

The number of times a millennial checks his/her phone daily
- SLD

38% are bilingual
- Nielsen, Feb 2014

Percentage of Millennials 18-29 who use specific social media sites
- Pew Research Center

83% Facebook
53% Instagram
37% Twitter
34% Pinterest

Millennials make up roughly 25% of the population of the United States
- Nielsen

37% 34%

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Millennials and Technology

- Millennials use technology differently than any previous generation and expect more technology innovation and use

Technology:

- has always been available
- blurs the lines between work and life creating a new work/life balance
- is a necessity, not an option
- is a social and economic enabler
 Millennials:

- are the largest portion of the global workforce
- expect technology to help enable assignment structuring processes
- gather value-added knowledge from mobile devices and be kept up-to-date during the business travel and assignments
Perspective on Change – Meeting and exceeding expectations

- Use of technology can help you win the “war on talent” by enhancing the workplace experience

- The evolution of technology has increased the emphasis on the refinement of technology

- Enterprise solutions must handle an end-to-end process, not multiple technologies for specific tasks

- Globally mobile employees expect to be involved in mobility processes with up-to-the-minute information and self-management capabilities

- As governments become more technologically innovative, it’s imperative that you identify and implement technology to counteract and mitigate compliance issues
Technology panel

Jeffrey Bryson
Manager, Global Human Resources at Halliburton

Karen Welch
Director, Global People Movement at Sapient

Ana Balzi
Senior Global Mobility Advisor at UBS
I am Halliburton

FAST FACTS

Name: Jeffrey Bryson

Hometown: Houston, TX, USA

Title: Manager, Global Human Resources

Start-date with company: December 2012

- Has over 20 years of experience in global mobility and human resources management
- International HR Function Leader – Expatriate Programs & Strategy
- Led HR Transformation efforts for Global Mobility
- Global Policy & Process Owner (GPO) for Expatriate / International Assignment Programs
- Oversight of Expatriate Compliance Programs (Expat Tax, Immigration, etc.)
Halliburton Company – Company Profile

FAST FACTS

Headquarters:
Houston and Dubai

Company Type:
Public

Founded:
1919, Duncan, OK, USA

Founder:
Erle P. Halliburton

Number of employees:
80,000

Website:
Halliburton.com

“To create sustainable value by delivering outstanding products, services, and Digital Asset solutions that help our customer succeed by maximizing production and recovery, realizing reserves from difficult environments and improving operation efficiency”

- American multi-national corporation and one of the world’s largest oil field services companies with operations in more than 80 countries.
- Major business segment is Energy Services Group (ESG)
Background and use of mobility technology

- Current licensee of KPMG LINK Global Equity Tracker
- Current licensee of KPMG LINK Cost Projector
- Manage many aspects of global mobility using spreadsheets and other databases
- Do not currently leverage a mobility management system or interfaces between different vendor platforms
- Looking to BHI Acquisition for potential expatriate technology gains
Future plans at Halliburton

- Baker Hughes Acquisition
  - Integrate
  - Stabilize
  - Optimize
I am Sapient

- Has over 15 years of experience in global mobility and human resources management
- Global lead of Sapient’s global mobility function
- Led the development and execution of a robust mobility governance structure and operational controls to support mobility compliance
- Currently leading the design and rollout of core mobility policy offerings
- Preparing for implementation of mobility technology and the expansion of Sapient’s mobility program to support people movements across other Publicis brands

FAST FACTS

Name: Karen Franz Welch
Hometown: Boston, MA, USA
Title: Director, Global People Movement
Start-date with company: June 2014
Fun Fact: I helped open the first McDonalds in Moscow
Sapient Company – Company Profile

Client-focused delivery, Creativity, Leadership, Openness, People Growth and Relationships

-“Mission-critical” values of Sapient

FAST FACTS

Headquarters:
Boston

Company Type:
Public

Founded:
1990, Boston, MA, USA

Founders:
Jerry Greenberg and Stuart Moore

Number of employees:
11,900

Website:
Sapient.com

- Marketing and consulting company that provides business, marketing and technology services to clients
- Sapient operates three divisions: SapientNitro, Sapient Global Markets and Sapient Government Services
- On February 5, 2015, Sapient became a fully owned division of the French advertising firm Publicis
Background and use of mobility technology

- Undergoing a vital internal cross-functional remediation effort for global mobility as a result of discovering and disclosing financial control environment deficiencies and material weaknesses over a 3-year period.

- Sapient did not properly report appropriate income and did not withhold and remit the appropriate amount of employment related taxes resulting from the movement of Sapient employees globally. Several subsidiaries had also created unrecognized permanent establishments as a result of work performed in foreign countries which triggered corporate tax liabilities.
Future plans at Sapient

- Plan to leverage a highly automated process to track risks associated with international business traveler population to assess permanent establishment as well as income, social and corporate tax.
- Plans to leverage technology to counteract the issues discovered related to the last 3-year period.
- Sapient will implement KPMG LINK Enterprise Assignment Manager and KPMG LINK Business Traveler.
- KPMG LINK Business Traveler will be used to track compliance issues for frequent business travelers.
- Processes associated with business travelers and assignees will be tracked and compliance will be ensured by leveraging KPMG LINK Enterprise Assignment Manager.
I am UBS

FAST FACTS

Name: Ana Balzi

Hometown: London, United Kingdom

Title: Senior global mobility advisor

Start-date with company: November 2001

Fun Fact: Has two and a half year old twins

- Has over 15 years of experience in global mobility and human resources management with a concentration at UBS in the UK and EMEA region
- Spearheaded a cost reduction initiative at UBS
- Rolled out strategic policy initiatives and streamlined the mobility management process
- Implemented large-scale technology solutions at UBS
- Key strategic partner for UBS’s HR transformation project
UBS – Company Profile

“UBS is committed to providing private, institutional and corporate clients worldwide, as well as retail clients in Switzerland, with superior financial advice and solutions while generating attractive and sustainable returns for shareholders.”

- Swiss global financial services company providing investment banking, asset management, and wealth management services for private, corporate and institutional clients in more than 50 countries
- UBS is considered the world’s largest manager of private wealth assets, with over CHF2.2 trillion in invested assets and remains the leading provider of retail banking and commercial banking in Switzerland
Background and use of mobility technology

- UBS has a track record of being early adopters of technology, especially in the mobility function. They have been licensing KPMG’s Link Enterprise since 2001 and KPMG LINK Global Equity Tracker since 2005.

- Initially the technology was primarily introduced to increase efficiency and drive global compliance to support the overall management of our growing assignee population.

- With the financial crash in 2008, the technology was used to support the Bank wide cost reduction initiative, with a greater focus on accurate cost projections for international assignees and a requirement to introduce leaner policies.

- One of the outcomes of the cost reduction focus was a fully comprehensive HR transformation, including the Global Mobility function. Technology played a key role in this project and assisted greatly with the establishment of the offshoring center in Krakow.
Future plans at UBS

- Global Mobility continuing to play a more strategic and operational role in the business traveler population
- In the short term, an increase in the volume of regular assignments due to the transformation but stabilizing over time based on business need
- Dealing with the impact of the wider HR Information system implementation and it’s downstream impact on Global Mobility technology and operating model
Moderated Q&A
Conclusion

Up-to-date information

Continued innovation

Employee empowerment

Mobile technology enabled

Single data repository and user login

Enhanced

Continued innovation

Employee empowerment

Mobile technology enabled

Single data repository and user login

Enhanced
Thank you

Presentation by
Adrian Anderson
and Chris Cowell
Questions for panelists

- What are the major technology challenges facing Global Mobility today?
- How can I use technology best to manage information flows between HR, vendors and assignees?
- How can I use technology to track assignees and to keep them compliant – what role do they play in this process?
- How do I establish what technology is right for my organization?
- What are the latest developments and where is technology headed?
- How will Social Networking impact Global Mobility?
- What impact is talent management playing on your globally mobile employee population?
- How is technology changing how your employees interact with you and vendors on international assignments?
- What feedback are your employees providing regarding your global mobility technology?
- What role does technology play in any future organizational or transformational projects?
Millennial Use of Technology

Video to be inserted
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