



Case study: Technology as a single source of truth to manage risk

We are increasingly finding that several challenges our clients face can be managed with the appropriate introduction of a technology solution. In this series of case studies, we take a look at some of the challenges faced by our clients and how they resolved them using technology.

The background

Our client took on a role as global mobility lead and inherited a small mobility team.

Over the past two years, her team dealt with an increasing number of international moves. Some of these were driven by a business need, and some were from individuals who wanted to work remotely for varying lengths of time. In addition, she was aware that some moves were taking place that she was not officially aware of.

The challenge

Our client realised that mobility was being managed in different ways across the business. She highlighted several issues to us:

- Requests for moves were directed to different people – some in her team and some not, and so information about moves, where it is documented at all, was spread across individual emails and various excel spreadsheets.
- Not having the data in one place caused issues - for example:
 - A move was initiated by the business to a country where there was no corporate presence – the manager in question had no idea that this could create a permanent establishment risk.
 - A move was planned based on a salary cost of £80,000 when in fact the salary was £180,000 – the number had been entered incorrectly into an old version of a spreadsheet.
- On one occasion a work permit had unknowingly expired – the expiry date was buried in the inbox of a person who had left the organisation.
- Even where worksheets were created and then shared, these were not always the latest version and were prone to errors.
- Much of the team's data was managed by an external service provider and they faced a time delay as well as sometimes a charge when they asked for a report.
- The client wanted a single source of information, held in one place, that was easily accessible. In their words, they wanted to *“take back ownership of our data, so we can keep track of all movers and make sure actions are taken in the right order and with appropriate sign off.”*

Our Advice

We were undertaking a review of our client's current policies and processes. As part of this review, we recommended that they think about a technology solution to support the planned changes. This would also help with the client's desire for a single source of information.

Why they chose Workia

We introduced our client to Workia who were able to arrange a live demonstration within the week. Our client was impressed with:

- The fact that this is an “out of the box” solution.
- It is easy to use – minimal training is needed.
- There are no implementation costs.
- It increases their security – data is backed up in the cloud and encrypted, with all files being sent as a secure link and not an attachment.
- It is cost effective.

Our client decided to move forward with Workia and had the software up and running within a week. It took them about 2 hours in total to upload all their data – they could import data from existing spreadsheets (once these had been verified as accurate), and they could get Workia help whenever they needed it via help chat.

How they chose Workia

Our client now has oversight of all their mobility cases. The mobility team have access to Workia and in line with the new processes we helped them set up, all moves are required to be initiated via the mobility team.

There is now one source of truth, and our client has an increased level of comfort that all moves, approvals and notes are held in one place.

In addition:

- The dashboard allows them to see cases starting and ending within specified periods, as well as work permit expiry dates.
- As all moves, past and in process are visible, they can see the history of any travel immediately.
- They can correspond across the business via the Workia platform – using the @ function.
- They can pull reports - either ones they build themselves or ones that are AI generated.
- Workia creates an [audit trail of approvals](#) – any document can be sent to anyone; our client is already creating assignment letters within the platform.

What might this mean for you?

Do you have a [robust system to track and manage your mobile employees](#)? Or are there some emails about cases, some discussions that aren't even documented and some old spreadsheets? Do you have [clear oversight](#) as to who has approved what – and why and when?

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