CERC 2016 CONFERENCE

GLOBAL MOBILITY: BUILDING A BETTER MODEL

September 25 – 27, 2016
The Westin Bayshore, Vancouver, B.C.

www.cerc.ca
The world of mobility is undergoing rapid change and disruption. Technology, demographic shifts, changing employee expectations and individualism are having a profound impact on the mobility industry. Organizations must adapt to these new realities and employ modern, innovative solutions in their mobility programs in order to leverage the opportunities this disruption presents.

This conference is designed to bring you the most innovative approaches to the challenges you face day in and day out, and prepare you for the future. You will hear first-hand experiences from industry leaders on topics such as, mobility policy development, cost containment and maximizing budgets, linking talent mobility to talent management, addressing the needs of inter-generations, tax and immigration compliance, cross border mobility and much more.

This conference will provide you with the insights, the tools and the knowledge, to better manage the mobility programs in your organization or those of your clients.

From our keynote speakers and plenary sessions, to the information packed seminars and workshops, there are boundless learning opportunities. Join together with mobility professionals from across North America and beyond to uncover new mobility solutions, discover breakthrough ideas and grow your networks.

**GLOBAL MOBILITY: BUILDING A BETTER MODEL**

**ARE YOU A LEADER WHO WANTS TO KNOW WHAT LIES AHEAD SO YOUR ORGANIZATION CAN ADAPT TO NEW REALITIES?**

You and your team will leave **INSPIRED**, **READY TO LEAD THE CHANGE IN YOUR MOBILITY PROGRAMS**, **MOTIVATED TO SHAPE YOUR ORGANIZATION BASED ON THIS FOUNDATIONAL EXPERIENCE** and **ENLIGHTENED**.

**WHY ARE EMPLOYERS EXPANDING MOBILITY PROGRAMS?**

- To manage complex talent gaps
- To expand their global reach
- To develop top talent
- To attract and fulfill employees
Global Economic Confidence

But...the nature of global mobility is changing, reflecting an increasingly complex global economic environment.

Schedule-at a-glance

**SUNDAY SEPTEMBER 25**
- 9:00 – 12:00 Optional Pre-Conference Workshop
- 12:00 Registration Opens
- 6:00 – 9:00 Welcome Reception & Exhibits

**MONDAY SEPTEMBER 26**
- 7:30 – 8:30 Breakfast
- 8:00 – 9:30 Welcome & Opening Keynote Speaker
- 9:30 – 10:30 Trade Expo & Refreshment Break
- 10:30 – 12:00 Plenary Session
- 12:00 – 2:00 Lunch & Trade Expo (last chance)
- 2:00 – 3:30 Concurrent Sessions
- 3:30 – 3:45 Refreshment Break
- 3:45 – 5:00 Concurrent Sessions
- 6:00 – 9:00 Networking Night

**TUESDAY SEPTEMBER 27**
- 7:30 – 8:30 Breakfast
- 8:30 – 10:30 Corporate and Supplier Roundtables
- 10:30 – 10:45 Refreshment Break
- 10:45 – 12:00 Concurrent Sessions
- 12:00 – 1:30 Lunch & CERC Annual General Meeting
- 2:00 – 3:30 Concurrent Sessions
- 3:30 – 3:45 Refreshment Break
- 3:45 – 5:00 Closing Keynote Speaker
- 6:00 – 6:30 Cocktails/ Cash Bar
- 6:30 – 9:30 Closing Gala Dinner & CERC Awards

**Monday, September 26**
- 8:00 – 9:30 Keynote Address
  The Importance of Culture and Purpose and How It Can Impact Mobility
  Dan Pontefract
  Improved levels of employee engagement helps the organization achieve its goals. Further, if the purpose of the organization and its team members are aligned, business success should follow. Yet, there is often misalignment between purpose, organizational culture and expectations to adapt to the “future of work.”
  This keynote address will uncover barriers that prevent harmonization of these important principles. You’ll learn how to distinguish mobility from other ‘shared services’ in the organization; how to sell the benefits of mobility to your leadership team; and how an open culture can be achieved through various actions that endorse a mobile workforce.

  10:30 – 12:00 Driving Business Success Through Talent Mobility
  Stewart Beck, Asia Pacific Foundation; Neil Crawford, AONHewitt; Bob Rosing, Dwellworks, LLC; Emree Staroff, Stanitec
  The ability to effectively hire, retain, deploy, and engage talent, at all levels, is really the only true competitive advantage an organization possesses today. Mobility supports that competitive advantage, but there are many barriers and perceptions to overcome.
  • How can we remove the regulatory barriers that handcuff mobility
  • How can the industry better promote and communicate the value of mobility to business outcomes
  • How can service partners and organizations work together to uncover innovative solutions that improve mobility programs and drive business performance
  Come prepared to join in a lively discussion with these business leaders and industry experts as they tackle these issues and more.

- 2:00 – 3:30 Linking Your Talent Mobility and Talent Management Strategies
  Steve White, PwC Law LLP
  “Talent Mobility” has gained significant importance in recent years as organizations respond to social and economic changes which have placed new demands on attracting and retaining talent. But how many organizations have successfully responded by directly linking talent mobility programs to their wider talent management strategies, including career development and succession planning processes, as well driving overall business success?
  Join the discussions to explore the benefits of linking these two important elements into your business strategies, and how to incorporate talent mobility into your overall talent management programs.

- Effective Housing Cost Management Strategies in Canada’s Economic Climate
  Debbie Barclay, Brookfield Global Relocation Services; Lisa Colby, University of British Columbia; Jeff Houck, SunCor Energy Inc
  Economic challenges are impacting Canada’s housing markets to varying degrees. In light of these realities, organizations are employing new and innovative solutions to ensure they continue to create cost management strategies in strong housing markets, while continuing to offer home sale programs in markets that are softening.
  This session will explore:
  • How economic realities are driving policy and program changes
  • How organizations are meeting employee housing needs, while managing costs effectively
  • The consequences of retaining or removing benefits to an employer’s ability to attract and retain talent
Developing an Effective Immigration Compliance Policy
Melodie Hughes Molina, PwC Law LLC
Governments around the globe have imposed stringent immigration compliance obligations on employers that move personnel across borders. Failure to meet these obligations can have significant financial costs to the organization and unintended consequences to the employee.

Attend this interactive session and receive practical tools to ensure your organization has a response compliance program in place, including:
- Compliance essentials, including the new Administrative Monetary Penalty regime
- How to anticipate and mitigate against liability risks, including those posed by external service providers
- Tips and strategies for effective and concise communication

3:45 – 5:00
Cost Saving Opportunities for International Assignments
Claire Hart, Nexen Energy ULC; Stephanie Shaw, Teck Resources; Chris Zarkadoulas, Sun Life Financial
In today’s challenging economy, organizations are searching for cost effective ways to reduce the costs of their global mobility programs. In this highly interactive session our panel, representing three very diverse industries, will share how they are approaching this challenge, from policy modifications to process overhauls.

Learn how other organizations are managing mobility costs while maintaining their program objectives, and the benefits and risks of various global relocation policy strategies.

Uber Mobility: Does the Buck Really Stop Here?
Cherie Broz, Aritzia; Tricia Cochran, Crown World Mobility; Lynn Fiorini, WelcomHome Relocations; William Taylor, Meyer Law Group
Technology is driving change in the mobility industry. Real-time data and mobile services, coupled with the need for low cost mobility alternatives, especially for early career employees, new hires, and self-initiated moves are in high demand. Yet, relocation is a stressful transition, and many prefer the human touch. How do organizations balance these needs and what lies ahead? This interactive session will explore:
- What information employees expect to have at their fingertips
- Airbnb already competes for some temporary living, but what’s next
- Duty of Care required of employers
- The true costs and potential consequences of a hands off mobility program

Globally Vocal: Real Talk from Expats
Brock Judiesch, Cigna; Heather Mulkey, International School of London Group; William Shenandan, National Foreign Trade Council
This presentation examines how expats value their benefits programs, based on results of a recent survey of over 2,700 expatriates working in 156 countries by Cigna Global Health Benefits and the National Foreign Trade Council. It will also explore the impact of a move on children, including results of a research study which found the factor which has the single greatest negative impact on how children learn is whether they have to move. Learn more about:
- The need for flexibility/customization when developing expatriate plans/programs
- Developing strategies to better prepare the globally mobile and their families for success before embarking on assignment, including schooling considerations
- Improving communication strategies to support assignees and reduce assignment failures

Tuesday, September 27
8:30 – 10:30
Corporate Roundtable (Corporate delegates only)
Join the discussions with your corporate peers and colleagues in an interactive session that will tackle some of your tough relocation challenges. Always the highlight of the conference, this is an excellent opportunity to share your relocation management experience and learn new implementation strategies.

Stop Selling and Start Storytelling (Service delegates only)
Tony Chapman
Are you drowning in a sea of sameness, a race to zero without an airbag? Has price become your primary tiebreaker and procurement your worst nightmare?

Tony Chapman has helped organizations large and small, locally and globally differentiate to win in marketplaces as competitive as ours. He believes the path to success is by becoming part of the client’s story, versus simply selling and telling yours. To focus less on your service and how it works and more on why it really matters.

Every relocation is charged with the same emotions of a world class novel. It has angst and ambition, disruption, complexity, anxiety and hope. However the best relocation stories are those where obstacles are overcome, where negative emotions become positive, where the individuals on the move and the livelihood of the organization sponsoring them succeed in every possible way.

In this inspiring keynote learn how to stop selling and to start storytelling. To shift the conversation from providing a service to enabling what matters most - lives and livelihood.

10:45 -12:00
The Most Critical U.S. Canada Cross Border Tax Strategies and Trends You Must Know
Christina Diles, Deloitte; Ann Stafford, Brookfield Global Relocation Services
In order to remain compliant with tax laws, mobility between Canada and the U.S. must be treated with the same due diligence as an international relocation. This session will identify top trends in cross border activity and steps organizations should take to ensure compliance.

Explore best partnering practices with your internal company stakeholders and external providers to minimize risk and offer more efficient tax planning, including:
- Potentially unexpected liabilities resulting from expatriates and business travelers
- Determine how Frequent Business Travelers (FBT) affect corporate compliance
- Analyze rapidly changing reporting requirements and the critical nature of comprehensive data

Managing the Changing Expectations and Needs of Your Multigenerational Assignees
Danielle Samuels, University of British Columbia
While the average age of an assignee today is between 26 and 44 years of age, within that average are millennials, GenXrs and baby-boomers. Each group has their own unique experiences and expectations when accepting an assignment. For millennials there is typically a high tech approach to services, communications and access to assistance. Baby boomers and those with more global experience, or families in tow, have different needs and expectations.

As a mobility professional how do you design effective policies that meet these disparate needs and expectations, while ensuring cost effective solutions are in place to guarantee successful business outcomes and employee satisfaction?
Top 10 Cost Saving Opportunities for Your Domestic Mobility Programs
Jennifer Connell, Weichert Workforce Mobility; Louis Lagacé, CN; Katharine Fahiner-Smith, University of Saskatchewan
The complexity and cost of mobility is on the rise. This session will outline the top ten techniques organizations are using to identify cost savings in their domestic mobility programs, from home sale practices and controlling exceptions, to widespread program changes including the evolution of flexible approaches. Gain a deeper understanding of:
- The factors that impact program administration in Canada
- Specific areas of programs where cost savings can be achieved
- How best in class organizations are managing costs while maintaining program objectives

2:00 – 2:45
Crossing the Cultural Borders of a Borderless World
Dean Foster, Dwellworks, LLC; DFA Global Intercultural Solutions
The 20th century framework of geopolitical borders is fast evaporating, revealing cultural understanding as the real, new border to be understood and responded to. Participants will gain a deeper understanding of the significant role cultural awareness plays in effectively managing the mobile populations they serve and support, including:
- Exploring the impact of cultural differences in a borderless world
- Understanding the importance and benefits of intercultural skills
- Discovering how organizations and individuals can adapt to these new cultural imperatives

Relocation Biggest Challenges: A Look at Trends and Best Practices
Linda Lachapelle, Cartus Canada
This session will explore the ever changing mobility landscape and discuss key findings from Cartus’ Biggest Challenges survey, including international mobility trends, cultural barriers, payroll and benefits, and compliance issues. Locations discussed will include China, Brazil, and various countries in Africa and include real-life experience from companies currently doing business in these regions.
- Explore the most significant challenges global mobility practitioners are facing in their programs
- Share approaches that organizations are using to address challenges
- Tools for managers will include specific best practice action steps and program/policy tips

Conscious Capitalism Social Values and the Impact on the Mobility Industry
Anita Meyer, am&pm Relocation; Dominic Tidey, EuRA
Research by the Harvard Business Review has shown that conscious businesses are ten times more profitable than their competitors. With Gen X and Millennials making different choices about purchasing and selecting ethical businesses, this new philosophy not only makes sense for wider society, but for the mobility industry.
Using a case study, participants will gain a clear understanding of how Conscious Capitalism has been applied within a European relocation company and how it is transforming both their operations and marketing and CSR strategies.

“"We are seeing a move away from a one-size-fits-all policy and reward approach for mobile workers.""
Exhibitors

Our Trade Expo profiles some of the most innovative products and services from CERC member companies. It is a great opportunity to discuss new ideas and solutions with service providers.

- All Points Relocation Service
- Atlas Canada
- Atlific Hotels and Resorts
- BDO Canada Immigration Services
- Brookfield Global Relocation Services
- Camana Plaza
- CARTUS
- Cigna
- DelSuites
- Dwellsworks, LLC
- Equus Software
- EuRA Relocation
- Group Mortgage Plan (GMP)
- Homewood Suites by Hilton
- IHG - InterContinental Hotels Group
- L. Hansen’s Forwarding Ltd.
- Les Suites Hotel, Ottawa
- Livingston International
- Marriott Hotels
- Master Key Alliance Inc.
- MayFlower Canada
- Mover One International
- Newland Chase Canada
- Premiere Suites
- PwC Law LLP + RBC + RELONAT + SIRVA
- Sky View Suites Group Inc.
- TheMiGroup
- TransferEASE Relocation Inc.
- United Van Lines
- Veranova Properties Limited
- Weichert Relocation Resources Inc.
- XN Financial

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Graebel Companies Inc.
Oakwood Worldwide
RELONAT

Exhibitors Prize

MediaEdge Publishing

In Kind

Armstrong Moving
ConferenceDirect

Conference Planning Committee

Chair:
Mathieu Belanger
AMJ Campbell

Members:
Neil Anderson
Stantec

Katherine Bouchard
Weichert Workforce Mobility Canada ULC

Charlotte Christopherson
Brookfield Global Relocation Services

Stephen Cryne
CERC

Dawn Kramer
Ford Motor company

Rob Stone
TheMiGroup

Danielle Samuels
University of British Columbia

Register

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We invite you to register before July 15
CERC Member $995 + HST
Non-Member $1,420 + HST

After July 15 Standard Registration:
CERC Member $1,215 + HST
Non-Member $1,640 + HST

INFO ON OPTIONAL ACTIVITIES AT WWW.CERC.CA