

Key Steps in the Global Mobility Journey

From the decision-making phase to the end of assignments, CapRelo is dedicated to ensuring your employees' relocation experience is smooth, efficient, and tailored to their needs.



Streamlined Expenses

With a wide global reach, our Expense Management Specialists audit and process relocation expenses. With a focus on transparent financial clarity, our online expense submissions via **Companion** allow you and your employees to track the status of relocation expenses.

Maintain Data Integrity

Harnessing the power of data analytics, we meticulously track each step of the journey. This allows us to refine processes, anticipate needs, and deliver proactive solutions for a truly personalized experience. Additionally, it allows us to track and report on client/location trends, ensuring data integrity and informed decision-making.

MOBILITY JOURNEY



Decision Making

- Domestic cost projection - via Companion
- Cost analysis (revisions)
- Candidate pre-hire tour
- Pre-hire candidate policy consultation
- Benefit selection
- Offer letter
- Immigration evaluation
- Tax evaluation



Authorization

- Authorize via Companion
- Determine start date
- Capture the repayment agreement
- Brief employee on relocation policy and benefits
- Benefits enrollment (global healthcare)
- Establishing compensation services (shadow, payroll, and global expense reporting)
- Preparation and signature coordination of Letter of Understanding/Assignment



Service Delivery

- Consultants manage services and partners
- Exception management
- Escalation management
- Ongoing case management
- On-demand reporting
- Automated reporting
- Expense reporting
- Report to work check-in



Relocation Closing

- Processing final invoices
- Satisfaction surveys
- Final check-in
- File closure
- Year-end activities (aggregate reporting, tax gross up, etc.)
- Tax equalization
- End of year payroll collections
- Prepare global statement of earnings



Ongoing Assignments

- Regular check-ins
- Periodic allowance review
- Ongoing expense reimbursement
- Reporting
- Compensation Services (payroll processing, comp accumulation, shadow payroll, year end activities)
- Immigration monitoring
- Business travel monitoring



End of Assignments

- End of assignment authorization
- Satisfaction surveys
- File closure
- Year-end activities (aggregate reporting, tax gross up, etc.)
- Ongoing repatriation support to the assignee and family
- Immigration/visa adjustments
- Termination of global benefits (global healthcare)
- TEQ reconciliation
- End of year payroll collections
- Prepare global statement of earnings
- Final expenses

*Points in orange applicable to global operations only