

MOBILITY POLICY DESIGN CHECKLIST

A companion resource to “Before the Template: How to Build a Mobility Policy That Actually Works”

This checklist is designed to help an organization prepare for policy drafting or an adviser discussion. It is not necessary to know every answer at the outset. The purpose is to identify decisions, gaps, owners, and areas that require further analysis before a policy is drafted or finalized.

How to Interpret the Checklist

Do not treat the number of unanswered questions as a score. Look at where the gaps occur.

SECTIONS 1–3

Unanswered items suggest the mobility strategy, scope, or employee proposition is not yet resolved. Drafting policy language may be premature.

SECTIONS 4–7

Unanswered items indicate potential financial, compensation, employment, tax, immigration, benefit-design, or duty-of-care risk. Specialist analysis may be needed.

SECTIONS 8–10

Unanswered items suggest the policy may be sound but the organization is not yet prepared to administer, govern, communicate, or measure it.

Different answers from different business units or regions may indicate the immediate need is a current-state assessment and governance discussion rather than a new template.

1 Business and Talent Strategy

- ☐ What business or talent problems should mobility solve?

DECISION / OWNER / NOTES

- ☐ Before approving a move, have alternatives such as local hiring, remote work, travel, commuting, a short-term project team, or moving the work been considered?

DECISION / OWNER / NOTES

- ☐ Which roles, employee populations, or talent programs require mobility?

DECISION / OWNER / NOTES

- ☐ Is mobility primarily company-directed, developmental, recruitment-driven, project-based, or employee-initiated?

DECISION / OWNER / NOTES

- ☐ What annual move volume is expected, and how reliable is the forecast?

DECISION / OWNER / NOTES

- ☐ What would a successful mobility program make possible that is difficult today?

DECISION / OWNER / NOTES

2

Scope and Policy Architecture

- ☐ Which move types are in scope: travel, extended travel, short-term assignment, long-term assignment, permanent transfer, commuter, or remote work?

DECISION / OWNER / NOTES

- ☐ Which domestic and international geographies are most relevant?

DECISION / OWNER / NOTES

- ☐ Will one policy cover all populations, or are separate policies or tiers required?

DECISION / OWNER / NOTES

- ☐ What facts will determine which policy applies?

DECISION / OWNER / NOTES

- ☐ Who is eligible, and who can approve participation?

DECISION / OWNER / NOTES

3

Policy Philosophy and Employee Proposition

- ☐ How much employee choice should the program allow?

DECISION / OWNER / NOTES

- ☐ Will support be delivered through direct services, reimbursement, allowances, lump sums, or a combination?

DECISION / OWNER / NOTES

- ☐ Is the intent to make employees whole, offset specific incremental costs, remove critical barriers, or provide limited assistance?

DECISION / OWNER / NOTES

- ☐ How should support differ for company-directed, developmental, and employee-initiated moves?

DECISION / OWNER / NOTES

- ☐ What commitments are necessary for employees and families to accept and complete moves successfully?

DECISION / OWNER / NOTES

- ☐ How will employee and family readiness, expectations, and destination realities be assessed before approval?

DECISION / OWNER / NOTES

4

Financial Parameters and Cost Management

- ☐ What budget is available per move and across the annual program?

DECISION / OWNER / NOTES

- ☐ Which costs are essential, discretionary, capped, shared, or employee-responsibility?

DECISION / OWNER / NOTES

- ☐ Will cost estimates be required before approval?

DECISION / OWNER / NOTES

- ☐ Who owns the mobility budget, and which business unit or cost center pays?

DECISION / OWNER / NOTES

- ☐ How will estimates be compared with actual costs?

DECISION / OWNER / NOTES

- ☐ How will tax gross-ups, supplier fees, internal administration, and exceptions be included in cost analysis?

DECISION / OWNER / NOTES

- ☐ Have cost estimates been tested against real employee profiles, family circumstances, destinations, tax treatment, and supplier costs rather than standard assumptions?

DECISION / OWNER / NOTES

5 Employment and Total Rewards

- ☐ Which employing entity and employment terms will apply during and after the move?

DECISION / OWNER / NOTES

- ☐ For assignments, what is the intended end state — repatriation, localization, or onward movement — and who owns post-assignment career planning?

DECISION / OWNER / NOTES

- ☐ How will salary, incentives, retirement, health, and other benefits be managed?

DECISION / OWNER / NOTES

- ☐ For international assignments, will compensation be home-based, host-based, or hybrid/global?

DECISION / OWNER / NOTES

- ☐ Will tax equalization, tax protection, consultation, or filing support be provided?

DECISION / OWNER / NOTES

- ☐ Which housing, cost-of-living, transportation, hardship, danger, or other allowances may apply?

DECISION / OWNER / NOTES

- ☐ Can home, host, or split payroll deliver the intended design accurately?

DECISION / OWNER / NOTES

- ☐ How will employees be educated about filing obligations and tax consequences, whether or not tax equalization applies?

DECISION / OWNER / NOTES

6 Relocation and Family Support

- ☐ Which household-goods, storage, vehicle, pet, or specialty-shipping benefits are needed?

DECISION / OWNER / NOTES

- ☐ Will the program provide home-sale, lease-break, rental, home-finding, home-purchase, or property-management support?

DECISION / OWNER / NOTES

- ☐ What temporary-living and final-travel support will apply?

DECISION / OWNER / NOTES

- ☐ What spouse, partner, school, language, intercultural, or settling-in support is appropriate?

DECISION / OWNER / NOTES

- ☐ Which benefits will have dollar, time, weight, distance, or service limits?

DECISION / OWNER / NOTES

- ☐ What documentation, tax treatment, supplier use, or employee co-payment will apply?

DECISION / OWNER / NOTES

- ☐ Has the benefit design been tested for renters and homeowners, single employees, spouses or partners, dual-career households, employees with disabilities, caregivers, and families whose legal recognition or safety differs by destination?

DECISION / OWNER / NOTES

7

Legal, Tax, Immigration, and Compliance

- ☐ When is immigration review mandatory, and who initiates it?

DECISION / OWNER / NOTES

- ☐ When are individual tax, payroll, social-insurance, or employment-law reviews required?

DECISION / OWNER / NOTES

- ☐ How will remote work, commuter arrangements, or business travel be assessed before work begins?

DECISION / OWNER / NOTES

- ☐ Who can accept or reject identified compliance risk?

DECISION / OWNER / NOTES

- ☐ What employee responsibilities and consequences for noncompliance will be documented?

DECISION / OWNER / NOTES

- ☐ How will the organization track renewals, registrations, filings, and assignment end dates?

DECISION / OWNER / NOTES

- ☐ When is a location-specific security, medical, or duty-of-care assessment required?

DECISION / OWNER / NOTES

- ☐ Who owns emergency communication, crisis response, evacuation or repatriation support, and protection of employee location data and devices?

DECISION / OWNER / NOTES

8

Governance, Administration, and Suppliers

- ☐ Who owns the policy and has authority to interpret it?

DECISION / OWNER / NOTES

- ☐ Who approves moves and exceptions?

DECISION / OWNER / NOTES

- ☐ Which activities will be handled internally, outsourced, or delivered through a hybrid model?

DECISION / OWNER / NOTES

- ☐ Which suppliers are required in the relevant geographies?

DECISION / OWNER / NOTES

- ☐ What service standards, escalation paths, and data responsibilities will apply?

DECISION / OWNER / NOTES

- ☐ How will managers, HR, Finance, Payroll, Tax, Legal, and vendors coordinate?

DECISION / OWNER / NOTES

- ☐ Have business leaders, corporate and regional HR, Finance/CFO, Compliance, Legal, Payroll, HR Operations, Total Rewards, and — where third-party delivery is involved — Procurement participated in policy design?

DECISION / OWNER / NOTES

9 Technology, Data, and Communication

- ☐ What system or workflow will initiate, approve, and track moves?

DECISION / OWNER / NOTES

- ☐ How will employee data be secured and shared with suppliers?

DECISION / OWNER / NOTES

- ☐ How will payroll instructions, reimbursements, invoices, and accruals be controlled?

DECISION / OWNER / NOTES

- ☐ What reports do HR, Finance, leaders, and auditors need?

DECISION / OWNER / NOTES

- ☐ How will employees and managers receive policy guidance and case-specific instructions?

DECISION / OWNER / NOTES

- ☐ Who will answer employee questions and prevent informal promises that conflict with policy?

DECISION / OWNER / NOTES

10 Implementation and Measurement

- ☐ Which realistic employee scenarios will be used to test the draft?

DECISION / OWNER / NOTES

- ☐ What training is required for HR, recruiters, managers, Payroll, and suppliers?

DECISION / OWNER / NOTES

- ☐ How will existing employees or legacy arrangements transition to the new policy?

DECISION / OWNER / NOTES

- ☐ Which measures will indicate success: acceptance, completion, cost predictability, exceptions, employee experience, retention, or business outcome?

DECISION / OWNER / NOTES

- ☐ How often will the policy, supplier model, and market data be reviewed?

DECISION / OWNER / NOTES

- ☐ What process will be used to identify patterns, approve changes, and communicate revisions?

DECISION / OWNER / NOTES