***C1 – Customer First is Core Value 1!***

**C1 is at the heart of doing what we say we do**

In a highly competitive service industry such as ours, our ability to achieve the highest levels of quality and external Employee and Client satisfaction depends squarely on being able to outperform our competition.

**It’s not what we do, but how we do it that matters.**

C1 is a proactive communication process coordinated and delivered by each Relocation Consultant with the simple purpose of doing our utmost to eliminate preventable or avoidable service failures.

**It applies to ALL areas of service delivery**

The program is designed to make contact with both external service providers and the relocating Employee at pre-determined *critical points* in time from the early planning stages right through to completion of every relocation. This is to ensure that all parties remain aligned with agreed actions and logistics to avoid failures in communication or execution of service delivery.

*Remember: Be proactive so you do not have to be reactive!*

***General Processes and Procedures***

**Welcome Emails:**

**Authorization Receipt and Sending Welcome Letters**

* The Relocation Consultant will send out welcome emails within 4 hours of receipt of the email. (
* The Operations Coordinator should will have new authorizations in MoveTrack within 1 hour of receipt during normal business hours.

**Adjusting Welcome Letters**

* There are different Welcome Letters for the various types of Relocations:
  + Global Perm Relocations/Assignments
  + Domestic Perm Relocations/Assignments
  + Interns
  + Lump Sums
  + VIPs – reminder that the Operations Leader will send the VIP welcome letters unless otherwise specified
* The intent of a Welcome Letter is to be general enough that it fits most of the relocations and we ask that the RC only adjust the letter if necessary
  + Example – the relocation is already in process
    - Consider changing the letter to read: “If your move is already in process, we are here to help and want to review your relocation benefits to see how we can best support you!”

**Initial Consultation Call:**

The Initial consultation call should be a *high-level review of each benefit and what is covered*. The goal is to schedule a separate call to review the benefit in depth with the Relocating Employee. ***(right information at the right time!)***

Relocation can be overwhelming and our ability to tailor our communications and information feeds is *CRITICAL.*

**Household Goods Considerations:**

If the relocation of goods is more than 4 weeks out, schedule a follow up call with the employee for a later date. Review logistics and process at a high-level or as needed.

* + Example: “Since your relocation is not until this summer, lets schedule a time to review this more in depth closer to when you are ready to move. This way it will be more relevant. How does XXX work?” ***(right information at the right time!)***
  + Example: “Your time is important so please let me know if you’d like to continue into the details or if you’d rather schedule a follow up call at a time more convenient for you.”
* If the relocation is a rush (i.e. in less than 2 weeks) then consider that the discussion on logistics with the Relocating Employee should be all-inclusive.
  + Example: “Since you are moving quickly, I’m going to go into some additional details with you and I have some additional questions for you.” ***(right information at the right time!)***
  + This is the time to review terms they need to know, partial v. full unpack, delivery spreads, special crating and handling of household goods or personal items, etc.
* **A SPECIAL consideration for Summer/High Season moves (May-September and Winter Holidays)**
  + RC advises – *moves in the summer/high season increase significantly because children are out of school for summer and winter breaks and it’s often easier to move the family during this time of year. This cause the movers to book up quickly. Please know that I will do everything to accommodate your preferred dates. I ask that you give me as much notification as possible because it will give us a better chance at securing those dates.*
  + If they are not ready to deep dive into the household goods section, but they already know dates – please put through the dates with the mover ASAP to help ensure booking

**Destination Services/Home-Finding Considerations**

Destination Services has many parts, much like all of relocation! Here’s a general understanding of what is researched, reviewed and covered during each type of destination service program/service. Please be sure to discuss the various items the Destination Service Provider (DSP) can support them with, as well as outline items that may be important to the individual

* + Area Tour
    - Recommendations on neighborhoods
    - Commute/Transportation times
    - Community or Religious organizations
    - Shopping
  + Orientation/Local Government Compliance
    - Local Registration (as required)
    - Social Security (US)
    - Driver’s License process
    - Banking
    - Mobile Phones/Utilities
    - Other Daily Life Needs
  + Home Search
    - Market conditions/pricing
    - Availability and types of housing
    - Location specific housing
    - Scheduling/Accompanying on appointments for viewing housing
    - Application process
    - Lease negotiations
    - Move In process/check list
  + School Search
    - Location specific school process/registration guidelines
    - Applications/Interviews (as required)
    - Types of schools
    - Curriculum (International)
  + Departure Services (International)
    - Deregistration (as required)
    - Closing of bank accounts
    - Move out walk through/check lists
    - Lease break negotiations
    - Deposit refund support

**Temporary Living/Corporate Housing Considerations**

There are various types of Temporary Living and Corporate Housing that may be extended as a benefit to a relocating employee. Choice and Availability will vary by location (both domestic and international) and timing. Based on the benefits approved, explain Temporary Living and Corporate Housing choices/availability

* Hotels, Extended-stay hotels
  + Hotels require 24-48 hours’ notice to cancel a reservation
  + You can move out at any time and only be charged through the last day of stay
  + Hotels may typically require you to move in after 3 PM and out before 10 AM but will often move those times if the room is available for early check in or late check out
  + Maid service is standard hotel practice, timing of service varies
  + Meals/refreshments cannot typically be billed to the employee’s company unless policy/benefits allow
* Corporate Apartments
  + Formal apartment leases
  + Once secured you/your company is required to pay for the full reservation time booked
  + Many corporate apartments will require a 30-31 day minimum stay
  + Corporate Apartments typically include the apartment rent, housewares, furniture, cable, internet and utilities.
  + Maid service is extra and often either bi-weekly or weekly (only review if approved per policy)
  + Meals are not covered while in temp living; the employee has a full kitchen and they are expected to cover meals/groceries as if they were living at home

**Travel Considerations**

Many of our clients cover the costs of relocation-related travel. The coverage and use of travel benefits may vary by client. Travel may include booking airfare and hotel for pre-decision trips, home-finding trips, final move travel and return trips as applicable by policy and client program. Based on the benefits approved, explain and review travel benefits.

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  + Hotels may typically require you to move in after 3 PM and out before 10 AM but will often move those times if the room is available for early check in or late check out
  + Maid service is standard hotel practice, timing of service varies
  + Meals/refreshments cannot typically be billed to the employee’s company unless policy/benefits allow
* Rental Cars
  + Rental cars may be booked as either direct-bill or reservation.
  + Direct bill programs will be set up so that the billing is direct to Odyssey vs. the transferring employee.
  + Reservations are made on behalf of the relocating employee and will require they pay for the rental costs upfront and submit for appropriate reimbursement
  + Items such as car seats, navigation equipment an tolls are considered separate costs to the rental fee and as such should be reviewed with the transferee based on client policy and benefits

**Closing the Initial Consultation Call/Next Steps**

* The Relocation Consultant will advise the transferee of next steps – “Once we complete our call, I will…”:
  + Authorize your services with A, B, and C companies
  + Send you a high-level summary of what we discussed (Summary Letter), this will include any next steps, action items and your main contacts for each of the suppliers assisting with your move (Who’s Who document)
  + The transferee should hear (either via email or phone call) from the suppliers within 2 business day and they should contact RC if any concerns, delays or questions.
    - If urgent timing, the RC will prioritize with the provider
    - Set yourself a reminder to check in if you don’t hear from the provider and/or customer by the 3rd day.

**Sending Service Authorizations**

* The majority of Odyssey Supplier Partners have 4 business hours to respond and confirm receipt in most cases.
* If a RUSH move
  + Add a note to the supplier partner acknowledging their time window to respond, ask for it quickly and set a deadline
    - Example: I understand that you have 4 business hours to work on this, but I need the information quickly. Is there any way you can get back to me within the next hour?
    - Follow up within the timeframe

**Supplier Follow Up**

* Please allow the Supplier partner up to 72 hours to confirm dates are set, provide the survey date, provide the survey, etc.
* Set reminders
  + 3 days after authorization
    - Have you heard from the provider about connecting with the Employee?
    - Are they having issues, do they need help from you to schedule a call?
    - Were they able to schedule dates?
    - What’s the status?
  + Surveys – we should have surveys back within 48 hours.
    - If not received, follow up on day 3
    - Upon receipt of the survey, you should know pack and load dates - did they confirm pack and load dates?

**C1 Calls/Emails – For all services**

The services and steps outlined below are not all-inclusive but a guideline for critical information and milestones that should be shared, communicated and documented for the life of the file. It also serves as an understanding of the C1 Process and the pro-active approach and requirement on the lifecycle of the file and relocation.

* Ideally, you will want to complete your C1 calls in the morning whenever possible and to prioritize time zone related issues.
* The covering Relocation Consultant will complete C1 calls and items on behalf of the Relocation Consultant that owns the file.
* Weekends
  + If there is an action or event occurring over the weekend, C1 calls will need to be completed.
  + If a Relocation Consultant is unavailable for the day, the Operations Leader will be notified and the task assigned accordingly.
  + In the event of above and with prior knowledge, the Relocation Consultant wil advise the relocating employee of the covering Consultant or team member. Please be specific when possible.
* C1 follow up calls can be combined, i.e. review HHG survey and speak to Temp Living options

**Initial Contact**

* **C1 #1 – Initial Consultation**
* **C1 #2 – Email Summary of Services including relocation contacts**

**Household Goods Example:**

* **C1 – Household Goods deep dive / next steps**
* **C1 – Household Goods Survey Received** 
  + Call Employee
    - Confirm receipt of their household goods survey
    - Review any concerns/Everything looks good
    - Advise Employee on any out of pocket costs
    - Confirm their pack and load dates
    - Send follow up email to Employee outlining any Out of Pocket items or actions agreed to (e.g. you will check with their company on covering the items outside of policy – see email template) and copy in the HHG Partner
  + MoveTrack
    - Send Survey to Operations/Supply Chain Support
    - Enter Pack/Load Dates into MT (RC or Ops Coordinator)
  + Supplier Partner
    - Send HHG Survey approval template clearly notating anything that will bbe considered COD
* **C1 – Moving Dates**
  + Call the Supplier Partner – Call them 1st
    - 3-7 days before the Employee’s pack and load, confirm dates with mover and make sure nothing has changed
    - Do they need your help with getting anything form the Employee?
  + Call Employee
    - Clearly explain what they are to expect to happen at pack and load
      * What not to pack and or how to set items aside for the movers not to pack (send flyer)
    - Do they have any questions about the pack and load?
    - Remind them that they will receive the arrival time information about 24-48 hours prior to their day of pack and load
    - I will also be checking in on you during your pack and load to make sure everything is going well
* **C1 – 1st Day of Packing**
  + Call the Supplier Partner
    - Get the download from them 1st
    - Confirm that they arrived and if not, get the updated arrival
  + Call the Employee AFTER arrival time
    - I checked in with the mover…
    - How are things going?
  + Repeat process if there is a Day 3 to the Packing
* **C1 – Load Day** 
  + Call the Employee
    - Now that you are loading, we should have your transit schedule shortly
    - Reaffirm their travel plans and do you have access to your travel documents
      * Getting on an airplane
      * Driving
      * Keeping receipts while traveling
      * Temp living information
      * Etc.
* **C1 – Pre-Delivery**
  + Call the Supplier Partner
    - Contact them 72 hours after pack and load is complete to follow up on timing of the delivery/transit details if you do not already have the information
  + Call the Employee
    - Review their transit time and what that means
    - Review what to expect – delivery process, unpacking includes, debris pick up
    - Re-enforce the importance of filling out the bingo sheet and signing off on it
    - Remind them to document any damages in writing, pictures, etc.
    - DO NOT throw anything that’s broken away and photograph it
    - I will be calling to check in on you during the delivery
    - You will hear from the mover approximately 24hours (domestic)/Once customs cleared (international) prior to the date of delivery, sometimes sooner
    - Don’t panic if you don’t hear from them – just give me a call or send me an email and I’ll look into things for you
  + Move Track
    - Enter delivery spread into MT
* **C1 – Day Before Delivery**
  + Call the Supplier Partner
    - Confirm delivery is still on track to take place tomorrow
    - Global Team – make sure you allow for the time difference
  + Move Track
    - Enter actual delivery date into MT
* **C1 – Delivery Day**
  + Call the Supplier Partner
    - Get the download from them 1st
    - Confirm that they arrived and if not, get the updated arrival
  + Call the Employee AFTER arrival time
    - I checked in with the mover…
    - How are things going?
  + Repeat process every 3 days and reset expectations that you will be calling again
  + Assess if there is a claim
    - Remind them to document any damages in writing, pictures, etc.
    - DO NOT throw anything that’s broken away
    - Get a brief summary of the details
    - Advise that you will notify the claims department and that you will have a form sent out
    - Once they complete the form an appraiser will come out to determine if they can fix the item or if it needs to be replaced
    - Determine if there are immediate needs that need a quick resolution: Broken Beds, missing mattresses, etc.
  + Notify Supplier of Claim
    - Provide summary of what you learned
    - Ask for the claim form to be sent out
    - Copy in Supplier Manager
  + MoveTrack
    - Task yourself to follow up that EE received the claim form
    - Task yourself to check in MT weekly for any updates from supplier
    - Follow up with Employee once you have the update from the mover
    - Continue to follow up weekly until the claim is cancelled or resolved

**Destination Services/Home-finding Example:**

* **C1 – Destination Services Next steps**
  + What is a DSP?
  + What they can help with
  + Limited to Policy approved benefits – they will provide X
  + Follow up for Key Service Dates
    - If services are split up into separate dates treat each one as their own Service. If services are combined, then treat the trip time out as one Service
    - Example – 1 outing is only for home finding then the next week is schooling support, you would follow the below process for home finding date of service and then again, the next week for schooling.
* **C1 – Before the First Day of Service** 
  + Call Supplier Partner
    - 3-7 days before the Employee’s first day of DSP support, call the supplier partner to confirm scheduled services
  + Call the Employee
    - Confirm what to Expect and that you will be checking in with them during their time with the DSP as well as after
* **C1 – During Service** 
  + Call Supplier Partner
    - Get the download from them 1st
  + Call the Employee
    - I checked in with the [DSP Provider Name] …
    - How are things going?
* **C1 – Post Service** 
  + Call Supplier Partner
    - Get the download from them 1st
    - Document the time utilized
  + Call the Employee
    - I checked in with the [DSP Provider Name] …
    - How did everything go, were your needs taken care of, etc.

**Temporary Living Example:**

* **C1 – Temp Living deep dive / next steps**
* **C1 – Temp Living Options Sent**
  + Call Employee
    - Confirm receipt of their temp living options
    - Review any concerns/Everything looks good
    - Advise Employee on any out of pocket costs
    - Confirm their preferred housing options #1 &2
    - Advise Employee they will receive confirmation of their booking
    - Corporate Housing Move-In Instructions will arrive via an email 3-5 days prior to their move in date / Hotel Confirmations will arrive within the next 24 hours once the hotel is secured with Marriott or Travel Provider
  + Supplier Partner
    - Notify Partner of their 1st and 2 choices or Award 1st Choice option in ReloQuest or secure Hotel with Marriott or Travel Provider/Partner
    - Send Corporate Housing provider any COD amounts in writing
  + Move Track
    - Enter hotel booking into the temp living screens in MT if the hotel is being direct billed to the Travel AMEX or Operations Leader’s AMEX card
    - ReloQuest reservations are uploaded into MT twice a week so the Relocation Consultant is not required to enter reservations into MT TL screens
* **C1 – Temp Living Booking Secured**
  + Email Employee
    - Confirm with them in writing that you have secured their corporate apartment or hotel for their stay [detail dates]
    - Forward Hotel Confirmation to the Employee or confirm receipt of the Travel Itinerary which continues the hotel information
* **C1 – Prior to Arrival**
  + Call Employee
    - Confirm they have their reservation information available for their arrival
    - Confirm they know who to contact in case of an issue during check-in/arrival
    - Confirm they do not have any questions or concerns
* **C1 – Day of or 1st Day after Arrival**
  + Call the Corporate Housing Partner (Do not call the hotel)
    - Get the download from them 1st
    - Confirm that they arrived and if there have been any escalations from the Employee
  + Call the Employee AFTER arrival time
    - I checked in with the Corporate Housing provider…
    - How are things going?
    - Was the unit clean upon arrival, any issues with the unit, everything working okay?
  + Corporate Housing Partner
    - Escalate any issues/concerns to the corporate housing provider
    - Notify Operations Leader about any serious escalations
* **C1 – 35 Days Prior to Vacate (for stays longer than 30 days)**
  + Call Employee
    - Check in – are things still going well? Any issues/concerns with the apartment?
    - Confirm their move out date
  + Notify Supplier
    - Confirm intent to vacate/move out date with Corporate Housing provider
* **C1 – Pre-Check Out**
  + Call Corporate Housing Partner (Do not call a hotel)
    - 3-7 days prior to check out verify that move out instructions have been sent via email or call the supplier partner to confirm when instructions will be sent
    - Verify that they have not had any escalations since the last time you connected with them
  + Call the Employee
    - Verify that they have the move-out instructions or when they should expect to see them
    - Make sure they are all set to vacate, do they have any questions you can get answered for them?

**Booking Travel/Rental Car Example:**

* **C1 – Confirm Travel Needs – Book and Confirm**
  + Send service authorization and booking for requested flight/dates/rental car
    - Prioritize based on travel dates and client requirements, i.e booked in advance 14 days when possible
    - Follow up with Provider for requests within 24 hours
    - Confirm details with transferee
    - Update MT records with confirmed travel dates
* **C1 – Pre-trip Check in**
  + Confirm receipt of travel itineraries and information and answer questions as needed.
* **C1 – Post-arrival Check in**
  + Confirm safe arrival at destination
  + Update MT accordingly