

What Can You Learn From Moving Seniors and Professional Teams?

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In 2014, Worldwide ERC celebrated the golden anniversary of both the organization and the modern talent mobility (née relocation) industry. It was great fun flashing back to the cusp of the 1960s social revolution and realizing that equally revolutionary changes have occurred among the transferees that RMCs and other service providers work with every day. In fact, the social changes of the 1960s directly shaped today's transferee population.

That was Then...This is Now

While we do not have precise data, it is safe to say that in 1964, virtually all transferees were management- or executive-level men, moving at the request (or command) of their employer. Nuclear families were the rule, most married women did not work outside the home, and typically, the family included several children. Most transferees were homeowners, and direct reimbursement programs were de rigueur. Global assignments were still uncommon and typically reserved as plum positions for the most senior executives. Neat and tidy, cut and dried.

Fast forward 50 years. The 1964 profile family still exists, of course, but it has been complemented by many other corporate transferees: single parents, women, minorities, same-sex couples and more. Corporate transferees today hold positions from entry-level to chief executive, and they could be going to Bangkok just as easily as Boston. As the transferee pool and its needs became more diverse, our industry began to assume today's sophisticated, full-service shape.

And as we learned more about these diverse transferees with less-formulaic expectations, we developed new services to meet evolving needs and to make the relocation process less

stressful and disruptive. Whole new disciplines, such as cross-cultural training, emerged. Those of us who work with relocating employees became more intuitive and empathetic, anticipating challenges and offering pre-emptive solutions. This approach was good not only for the employees but also the employers, as employees were better prepared and returned to productivity sooner.

As a more worldly, professional and well-rounded industry, we are now at the cusp of another revolutionary change: helping people beyond corporate transferees to manage major life transitions. And we are likely to learn as much from these folks as we did from today's highly varied corporate transferee population. Here are just a few examples of these new relocation customers.

Seniors on the Move

We are all well aware of the challenges corporate transferees face: home equity position, family concerns, spouse career considerations and so many more. Yet transitioning from a longstanding family home to a senior community or a smaller home can be even more challenging than the typical corporate move. Though the spouse's career and the children's schools are no longer a factor, other concerns can loom large.

Recognizing this, several RMCs have introduced relocation programs tailored for seniors who are moving into an independent- or assisted-living facility, or simply downsizing to a smaller home. These programs take quite different shapes. Some center on a homesale program (usually an amended value-type program with a marketing period). Others eschew homesale but include home marketing assistance and an array of accompanying, a la carte services, such as household goods transportation, assistance with de-cluttering and staging the home for sale and more.

Pearce Plus, LLC was a pioneer in offering services specifically tailored for seniors. Maureen Campbell, CRP, SGMS-T, the company's president, says that seniors are often overwhelmed by the prospect of moving. "Sometimes they are truly paralyzed and don't really know where to begin. Our job is to focus them on the task at hand but also to listen carefully to their needs, just as we would for corporate transferees."

Another objective, as with corporate transferees, is to discourage seniors from making choices that will compromise the homesale and moving process. For example, hiring their old friend who sells real estate part-time on the other side of the county. That just prolongs the relocation process and often does not do much for the friendship, either."

Pearce Plus' service begins with several broker market analyses (BMAs) and a detailed condition report of the property, including photos. The company helps seniors to arrive at a competitive listing price and then recommends services needed to accomplish the relocation: de-cluttering, staging, organizing and more. "We work directly with some senior living communities", said Campbell, "which streamlines the communication process. We're able to keep the communities apprised of the progress of the move, making things a little less stressful for our client."

Differences between Corporate Transferees and Seniors

One might assume that without job pressures, a senior could take as much time as he or she likes to sell the home and complete the move. In fact, the move to a community can be as deadline-driven as a corporate relocation. Like any housing, the most appealing communities and residences fill up quickly, and when a desirable apartment in a coveted community becomes available, the senior must be prepared to move rapidly. And too often, a health crisis necessitates a fast relocation process.

The senior homesale programs offered by some RMCs can meet this need perfectly; the homesale has a finite end, and equally importantly, the senior gains access to the home equity, which might be needed to cover often-substantial entrance fees for the community.

Another difference centers on household goods. We encourage corporate transferees to edit their possessions before moving, to reduce transportation costs and stress, but they are typically moving to the same size house, or an even larger one. Seniors will almost certainly be moving to a smaller space. Closets, basements, attics and garages are frequently chock-a-block with goods: some cherished, some useful, some less so and some, like a garden tractor, just no longer needed. Anyone who has ever helped an elderly relative sort through a house full of goods appreciates how overwhelming just this one task can be. Objective professionals can focus the process and keep the move on track.

Lastly, according to Campbell, there are often several decision-makers or at least influencers. Adult children can be an important part of the process and they might be scattered in different locations. “For those who want to be involved, we try to assess their capabilities and give each person a role based on his or her skill set. Other times, of course, the seniors are all alone. And since they’re paying the bills, not an employer, most seniors are very focused on cost.”

Know Thy Customer

From a service standpoint, what can we learn from our new senior audience? First of all, to slow down and conduct a careful needs assessment. We would all like to believe we do this routinely, but corporate relocations often must move at such a pace that some fine points of service are lost. Sometimes we become too reliant on impersonal technological wizardry, from elaborate client/transferee online platforms to apps, at the expense of having an old-fashioned telephone conversation. A simple call can reveal an anxious or confused tone that would go undetected in an e-mail.

Seniors might not have moved for so long that they are almost like first-time corporate transferees. It is vital to take time to answer all of their questions and to probe for understanding. Explaining every aspect of the process at the beginning and preparing seniors for milestones as they occur will certainly result in a better service experience and could actually save time in the end.

RMCs that offer services for seniors often select several of their more patient, empathetic counselors to deliver it. They train them specifically on seniors' expectations and needs, just as they would for any new corporate client. This helps to prepare the counselors for the questions they are likely to receive. For example, the homesale process is anything but intuitive to someone outside of the talent mobility industry, and seniors might be skeptical that an RMC would provide this complex service without charging a hefty service fee.

According to Pearce Plus' Campbell, "Thorough explanations of the service and process are essential. Seniors need to feel comfortable that they're getting the best advice. We need to assure them that we're experts: we know what creates success."

Professional Athletes

Professional athletes are another not-so-obvious audience for relocation services. The major sports organizations all hold contracts with relocation management companies and/or directly with household goods transportation companies or real estate firms. Some individual franchises have their own relationships; for example, a partnership with a local real estate company to provide destination services.

Interestingly, though, the players themselves are often responsible for their own relocation arrangements and expenses. Chris Dingman, President of The Dingman Group, the leading sports relocation company, said: "According to the Collective Bargaining Agreements, across all 5 major sports, if it's a trade then the team that receives the player is responsible for relocation

expenses. Outside of a trade, like free agency, it's almost always the responsibility of the athlete to pay relocation costs."

This has created a robust niche market of specialized sports relocation management companies that work directly with players. According to Dingman, the need for reputable support was made even greater by past abuses. "Historically, athletes have been taken advantage of by unethical service providers and advisors. We have to battle past that stigma from the start. We alleviate their concerns by offering a refreshing and transparent process so they know what to expect from start to finish." Athletes find companies like Dingman's by word of mouth, national media coverage, teams, players associations and advisors.

Other than truly unusual circumstances (like the football Colts' midnight move of the entire team from Baltimore to Indianapolis in 1984), these tend to be one-off and unpredictable transactions. And it would not be an exaggeration to say that every move is different. If there is a policy at all (and usually there is not), there are likely to be so many exceptions as to make it a starting point for negotiations at best.

Who Exactly is My Customer?

In our corporate relocation experience, most RMCs and other service providers are accustomed to working directly with the relocating employee. Some busy, senior-level transferees might be less involved, perhaps relying more on a spouse/partner to manage the homesale and homefinding logistics.

Some athletes do get involved in the relocation process, but that might be more the exception than the rule. In fact, a preliminary question in relocating athletes is who your client (and decision-maker) really is. It might be the athlete, a spouse or another family member. For some twenty-somethings, the decision-maker might be Mom. For celebrity athletes, the decision-maker is more likely to be an agent or personal assistant, who will serve as

intermediary for the real estate, household goods and other decisions. At other times it could be an advisor, team or a contact at one of the players' associations.

To ensure a good service experience, it is critical to identify the various decision-makers and influencers, involve them in the process as appropriate and be sure to speak to their needs. For some younger players, in particular, money can outpace maturity and judgment. The involved parties can have different ideas of what constitutes an appropriate house and lifestyle and without some delicate mediation, real estate agents and other service providers could find themselves working in circles.

I Feel the Need for Speed

Regardless of who is making the decisions, these relocations will test the service providers' capabilities perhaps more thoroughly than any corporate VIP move. These customers or their agents will expect 24/7 availability, a rapid resolution of any questions or concerns and an unflappable response to unusual requirements. When homesale is included, it has a good chance of including inventory management, as seven- and eight-figure homes generally do not sell quickly and might reflect very personal tastes.

The timing can also be far more abrupt than any corporate transfer. A player can be traded while in the middle of a game and be expected to report to another city and team the next day. According to Dingman, "The player flies (on the new team's dime) to meet his new team, whether they are on a road trip or at home. Either way, we typically will work with a family member, spouse or advisor to execute the relocation plan.

In some cases we have to find a temporary home, schedule their moving crew and address their vehicle transportation needs in just a few days so things are ready when they get back from the road trip or shortly after. Simultaneously, we're working with the same people to navigate the

future home purchase in their new city or home sale process in their previous city.”

To the Rich Go the Spoils

Anyone who follows sports knows that professional athletes are quite well compensated. While some have surprisingly simple lifestyles, sometimes as renters, others earn tens of millions of dollars per year and live large. The closest analogy we might have to our corporate relocation clients would be the most senior executives receiving VIP relocation services. Homes tend to be massive and sometimes multiple, and the collections this wealth affords, from vintage wine to sports cars, from antiques to llamas, abound.

Large homes often contain a cornucopia of expensive furnishings, artwork and personal possessions—and that is before we have even considered that vintage wine cellar and those llamas! In these cases, RMCs count on their most trusted household goods partners to assess specialized needs, carefully prepare the many valuable items for transport and ensure the shipment arrives intact and on time. The household goods partners also assist with specialized transit for collectables and luxury or exotic vehicles.

With wealth and fame come the need for discretion and confidentiality. How do companies’ protect the athletes’ privacy? Dingman said, “We use aliases. It’s extremely difficult for a moving crew, real estate agent or vehicle transporter not to gain intimate knowledge of who they are helping. Let’s face it, they are packing their most trusted personal items and potentially listing a home that has public tax records associated with the address. In our experience, using an alias when contracting with our service providers, and recommending home purchases be done through a trust or LLC, has greatly protected our clients’ identities during the relocation process.”

We’re Here....Now What?

At the destination end, the RMC's real estate alliances become invaluable. In our corporate relocation business, most of us do not trade much in the ultra-luxury market. Local agents who do can assemble a portfolio of candidate properties, and with their experience in this market, they can deliver a truly VIP destination service experience with the professionalism and discretion that is required. As with many high net worth individuals, it is not unheard of for a multi-million dollar home to be purchased sight unseen, by third party holding companies or LLCs. Experienced luxury agents can finesse this requirement as well, using virtual tours and other technology.

Of course, finding a residence is just a small part of settling into the new location. The RMCs that specialize in sports relocation also provide complete settling-in services, stocking pantries and refrigerators. They can find housekeepers and gardeners, arrange transportation by private jet, take care of car leases and more. Indeed, one of these RMCs, Sportsrelocation.com, advertises, "You make the team, we make it home."

What Can We Learn From Relocating Athletes?

Such exacting requirements and small margins for error can help keep RMCs that work with athletes at the top of their game. It forces providers to reconsider what is possible, taking an unvarnished look at unnecessary bureaucracy and pointless procedures that might have taken root over the years, and that slow or compromise service delivery. Processes can be re-engineered for greater efficiency, which will not only provide a better service experience to athletes and other transferees in a rush but also boost the company's profitability.

It is also interesting to note that while the home values are high and the services comprehensive, athletes and their families face the same disruption as any corporate transferee, and perhaps more.

Said Dingman, “The fact is it’s not any easier for an athlete and his family to relocate than the average person. I’d argue it’s more stressful and difficult. We’ve had two retired ballplayers’ wives tell us that after it was all said and done they moved 52 and 83 times! As a general rule, athletes have little if any notice when they will be traded. Even worse, they rarely know where their destination city is going to be until the very last minute. This is true for trades, free agency and even drafts. Our group is able to set their mind at ease by putting a plan in place very quickly and even offering up case studies of players who we serviced recently that match their exact situation.” Counselors who work with athletes are attuned to this and can help to ease the transition to an entirely different home and lifestyle.

Relocation Services: Not Just for Corporates Anymore

Seniors and athletes represent interesting, if quite different, case studies of non-traditional relocation services, but they are by no means the only ones. Many RMCs have developed services for associations, members of the military who are not receiving government relocation benefits and individuals who are moving without the support of an employer. It turns out that the careful needs assessments, custom program development, supplier selection and management and budgeting process we apply to corporate moves are equally valuable for many different potential customers. And meeting the very specific requirements of these groups and gaining their unique insights will surely make us even more creative, empathetic and effective in our delivery of corporate relocation services.