

Implementation: Guiding New Clients Through the Onboarding Process



Implementation is where we set the tone for how to achieve the best working relationship with a client.

CUSTOMIZED TRANSITION

The first step of onboarding a new client is the implementation process. We design processes that are customized to the client’s company culture, program, and policy needs, ensuring that we truly understand the organization and its business objectives and goals, values and philosophies, and their expectations of Cartus.

Our project plan contains all details required to ensure correct set up of the client engagement for delivering service excellence. Throughout the implementation, the project manager ensures all tasks are being addressed and completed in a timely manner. This enables a smooth progression of the implementation, thereby avoiding a last-minute rush to complete deliverables, which may result in errors.



Number of project managers worldwide:

10



Average industry experience:

24 years



Team experience:

U.S. and Canada domestic home sale, international assignment management, international and U.S. domestic expense management, consulting, and intercultural services

Methodology and Delivery

To successfully manage all deliverables and their interdependencies, we structure the implementation process to follow a work stream methodology, where each work stream represents a focus area of the project. We have found this to be the most effective method of building simple, compliant, and scalable solutions to meet client needs.

Plan components include:

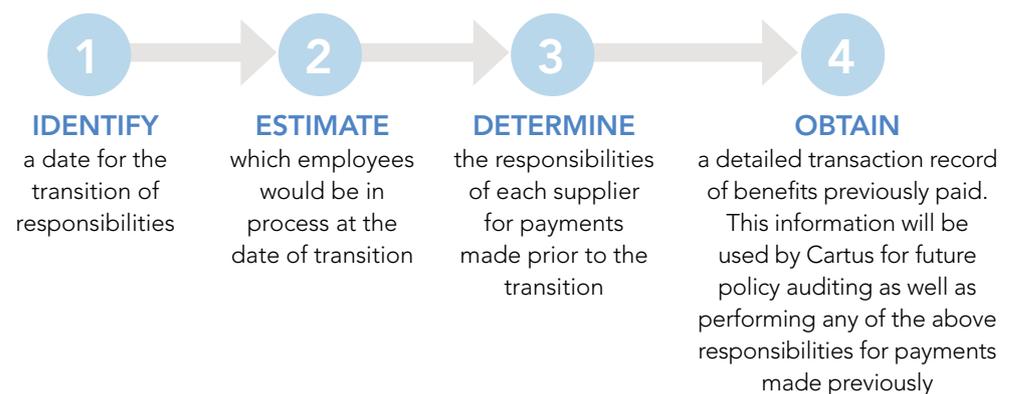
- Complete mapping of policy and refinement of processes
- Configuration of billing and reporting deliverables
- Management of in-progress employee population transition

Deliverables include:

- Commencement of agreed reporting
- Focus on transition of in-progress employees, avoiding service disruption and maintaining satisfaction
- Completion of all customized line items in transition plan

Transition Process Steps

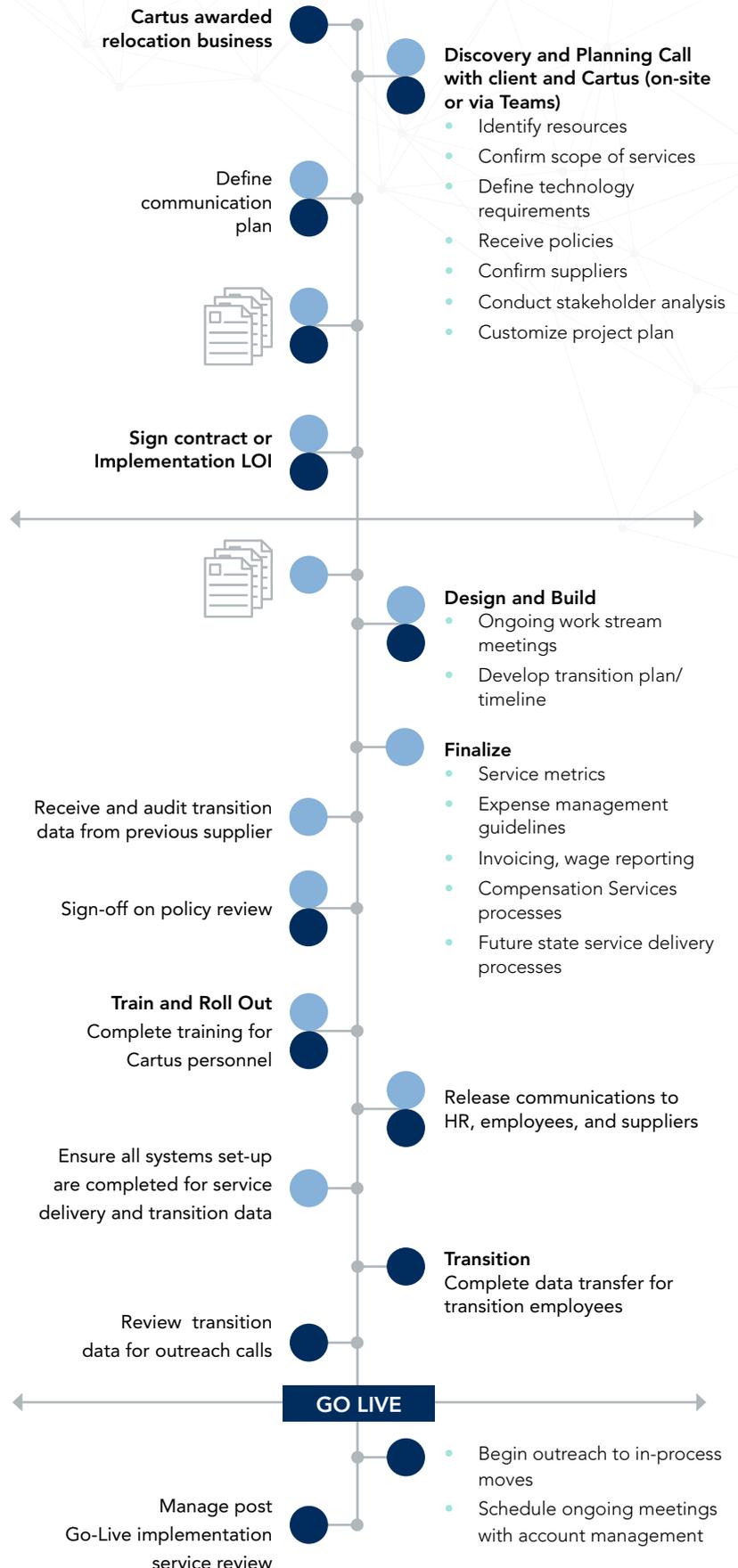
Cartus works with the client and the current supplier to transition in-progress employees. To accomplish this, we take the following steps:



IMPLEMENTATION MILESTONES

We break the implementation process into critical phases, with overlapping action steps and timing as follows:

- **Prior to start:** The client and Cartus enter into a contractual agreement.
- **Discovery and planning:** Identify and deploy resources, review current state to gather requirements, identify primary and secondary suppliers, engage project sponsor and stakeholders, plan the transition and communication strategy, gather business intelligence requirements and data for transitioning in-progress employees, and finalize project plan and risk-mitigation strategies.
- **Designing and building:** Design and develop future state, complete system configuration and design of billing deliverables, expense processing, payroll deliverables, international assignment compensation services; link key performance indicators (KPIs) to deliverables for tracking and management, develop analytics, audit and complete systems set-up of transition data, and complete supplier set-up.
- **Training and roll-out:** Validate completion of mission-critical deliverables for a smooth start-up, train the client and service-delivery/support teams and suppliers and commence service delivery.
- **Hyper-care period:** Update implementation deliverables with new information from the client; collect client feedback on implementation and seamlessly transition ownership of engagement to Cartus account management.





EVALUATION AND CUSTOMER EXPERIENCE

Formal evaluation: At the conclusion of each implementation, we request our clients to complete an evaluation. This provides us with direct feedback on our efforts to deliver an in-scope and on-time implementation. We appreciate and value our clients’ input—it helps us to know how well we have met their needs, and what areas we should focus on in the future, to increase our value and meet the individual challenges each client faces.

Better customer experience: Cartus is committed to continual improvement, and, in that spirit, we conduct retrospective studies at the conclusion of each implementation. This helps us in creating new process efficiencies and developing best practices for our clients.

Cartus is committed to continual improvement.

YEAR	SERVICE SATISFACTION	SERVICE EXCELLENCE	RETURN RATE	NUMBER OF EVALUATIONS
2021	100.0%	94.4%	48.7%	18
2020	100.0%	87.5%	72.4%	21
2019	100.0%	90.0%	69.8%	30

Satisfaction rates: Cartus has successfully managed nearly 250 implementations in the past three years, and the team has earned a **100% satisfaction** rating, with **94.4%** of respondents rating the implementation service as “**excellent**” over the past 12 months.

*“**Excellent job**, and I do appreciate all the hard work that John Simon and the entire Cartus implementation team has done—**detail-oriented no matter whether it is high-level policy implementation or system set-up, very patient and well organized**. I would personally say a big THANK YOU to John. Without him, we couldn’t make it.”*

— Client in Digital Interactive Entertainment Industry

*“Everyone from the Cartus team did a fantastic job. This was my first time handling international services, but **everyone on the team was extremely knowledgeable and helpful**. They did a great job clearly explaining each piece [during implementation]. The timing of the project was well paced, and everyone was very responsive. **I feel the Cartus team truly went above and beyond in their assistance.**”*

— Client in Retail Industry

FIND OUT MORE

For more information on implementation and relocation-related resources, please visit our [resource hub](#). To connect with a Cartus representative, email CartusSolutions@cartus.com.

www.cartus.com

© 2022 Cartus Corporation.

All rights reserved.

Cartus and the Cartus logo are registered trademarks of Cartus Corporation.

connect with cartus

