



TIPSHEET

8 tips for getting – and staying – ahead of the mobility decision-making process

Global mobility teams often enter the conversation too late. An offer has already been made, a location has already been chosen or a business leader has already set expectations with an employee before mobility ever sees the file. When that happens, mobility professionals are left managing the consequences of decisions they had no part in making, rather than shaping better outcomes from the start.

Discussions with mobility leaders surface a clear pattern: the strongest programs are not waiting to be looped in. They are building structure, documentation and governance that place mobility experts into the conversation before commitments are made.

If you're one of many who struggle with this, below are some practical tips to help you get there.

1: Build a hard stop into your HRIS

One of the most effective tactics mobility leaders shared is a structural one: configure your HRIS so that no offer, letter of engagement or contract can be drafted until mobility has reviewed the case. This is not about creating bureaucracy for its own sake. It is about protecting the business and the candidate from decisions made without the full picture.

A mobility review before any paperwork moves forward ensures:

- The candidate can be routed through the correct immigration pathway for compliance and realistic timelines can be set, rather than reacting to arbitrarily promised start dates
- The role and location are confirmed against the right policy tier, so the candidate qualifies for the benefits the business assumes they will receive
- The candidate understands the full financial and location implications of the assignment before they accept, reducing the risk of a failed move or early repatriation

Without this checkpoint, mobility is often brought in only after an HR leader, hiring manager or talent scout has already made a verbal commitment. As one leader described it, the cost estimate arrives later, creates sticker shock, and becomes a pain point rather than a planning input.

Building the gate directly into your HRIS removes the temptation to skip that step and gives mobility the leverage to insist on review without having to chase approvals after the fact.



2: Use a decision matrix before a move is initiated

A pre-decision evaluation tool, often a simple scoring matrix, can help your business weigh the value of a proposed assignment to the individual, the business unit and the enterprise before anyone signs off. One mobility leader shared that applying this kind of matrix might mean that several proposed moves do not actually take place, because the process forced stakeholders to articulate succession plans and assignment objectives up front. Don't think of that as a bottleneck. Instead, it's mobility doing exactly what it should: helping the business ask whether a move is the right answer before assuming it is the only one.

3: Track failed assignments to build your case

If you are struggling to get involved in early decision-making, data can do much of the persuading for you. Several leaders are now tracking failed assignments or early returns, including replacement costs, lost productivity and disruption, and using that data to demonstrate why mobility needs to be consulted earlier. A documented pattern of avoidable failures, and the cost to both the business and employees, is a far more compelling argument for upstream involvement than a general request to "be looped in sooner."

4: Put assignment objectives in writing

Stating the purpose of a posting directly in the letter of assignment gives everyone, including the employee, a shared understanding of what success looks like. It also gives mobility something concrete to measure against later, whether that is leadership development, knowledge transfer, market expansion or filling a critical skills gap. Without documented objectives, it becomes nearly impossible to evaluate whether an assignment achieved what it was supposed to.

5: Position mobility as a risk reducer, not a blocker

Getting ahead of the decision-making process only works if mobility is seen as a partner rather than an obstacle. Several leaders emphasized that the goal is never to simply say no. Instead, sit with the business, walk through the cost and compliance implications and, where appropriate, offer alternatives such as local development, remote work, short-term assignments or targeted business travel. This positioning matters because it is what earns mobility a standing invitation to be part of overall strategic talent planning.



6: Set expectations early with clear terminology and documents

Part of getting ahead of the conversation is managing what candidates and business leaders assume before mobility ever reviews the case. Some organizations now use signed documents to clarify and reinforce that a relocation or visa sponsorship does not guarantee a specific immigration outcome, such as a green card.

Others have changed internal terminology, such as replacing "permanent transfer" with "one-way move" to avoid creating expectations the business cannot support. Small language choices like these can prevent misunderstandings from growing into disputes or disappointments later.

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7: Track immigration-sensitive populations directly in your HRIS

Some organizations learn, often during a sudden policy or enforcement change, that they cannot quickly identify which employees hold specific visa types because that data lives only with an external immigration provider. Maintaining this information directly in your HRIS, or ensuring true API integrations with your providers, means you can answer leadership's questions about risk exposure in minutes rather than days. It also reinforces the case for mobility being consulted before an offer is extended to a candidate who may require sponsorship. Understanding the exact scenario and communicating about typical timelines for securing the right immigration status helps stakeholders understand why moves might not happen as quickly as they would like them to.

8: Make the business case with a cost avoidance story

Executives respond to numbers. Consider embedding a decision-making process that helps avoid substantial costs by either preventing moves that do not need to happen, or adjusting the deployment type to better fit the criteria. Positioning your early involvement in terms of cost and risk avoidance, not just process improvement, reframes the function from an administrative cost center into a safeguard for your business's budget and reputation.

Getting ahead of the decision-making process is not about adding more approvals for the sake of control. It's about ensuring every assignment that moves forward is compliant, correctly structured and fully understood before anyone signs anything or begins planning.

Sterling Lexicon works with mobility, HR and talent acquisition leaders to build exactly this kind of upstream structure, from HRIS governance gates to decision matrices and policy frameworks that hold up under scrutiny. If you are ready to move your team from reacting to decisions to shaping them, [schedule a strategy conversation](#) with us.





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