

Deloitte.



**2017 Americas Global Employer
Services Conference**

Mobility: Horizons rethought

February 2017

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Welcome letter from Deans



Dear clients and colleagues:

As you witness each day, in both your personal and professional lives, our world is constantly changing. The 'tomorrow of yesterday' is different than the 'tomorrow of today.' For mobility professionals, this net is cast even wider. Ambitions are greater. Stakes are higher. This year's Americas Global Employer Services Conference, Mobility: Horizons rethought, illustrates this shift and brings new perspective to the tomorrow of the future.

We invite you to join us from February 22 through 24, 2017 at the [Marriott Marquis in San Diego](#), California. There, we'll spend three days on a collective journey, exploring the mobility issues that impact you today, those that will impact you tomorrow, and rethinking what may appear on the horizon.

Your feedback guided our decisions when planning this year's conference. Certain aspects of the program remain unchanged: multiple learning formats, dynamic keynote speakers, personalized agenda options, and meaningful networking opportunities. Other aspects are enhanced. Classrooms offer more technical content. The Collaboration Zone is designed as a space where attendees can discover new solutions to current mobility issues with both subject matters specialists and facilitators. In addition, we are excited to offer our [Deloitte Greenhouse Lab](#) experience, which allows participants to delve into and solve challenging issues by disrupting conventional thinking and spurring creativity.

Whether your focus is on operations and/or strategy, conference attendees will benefit from robust discussions developed to examine mobility's current state and potential future. Our sessions will offer technical knowledge and innovative solutions to tackle challenges and opportunities facing today's global organizations.

We certainly hope that you will join us this February in San Diego. More information is available within this guide and on our [registration page](#).

Should you have any questions, please contact a member of your Deloitte engagement team or either of us. We hope that you are as excited to join us as we are to welcome you!



Grace Melton
Partner, Deloitte Tax LLP



Jim Pickett
Partner, Deloitte Tax LLP

Agenda



All times are noted in local Pacific time

Wednesday, February 22nd, 2017

Time	Session	Attendance
8:00–3:00p.m.	Arrivals/client service meetings	
1:00–3:00p.m.	Registration opens	
3:00–3:30p.m.	Welcome from Deans	Plenary
3:30–5:00p.m.	Conversation #1—CHRO Priorities	Plenary
5:00–6:00p.m.	Collaboration Zone and networking with cocktails and hors d'oeuvres	Plenary
6:00–8:30p.m.	Dinner reception	All

Thursday, February 23rd, 2017

Time	Session	Attendance
7:30–8:30a.m.	Industry breakout breakfast	All
8:30–1:00p.m.	Greenhouse Lab—Employee experience – how can you enhance the experience for your mobile employees? (includes lunch)	Elective
	Greenhouse Lab—The mobility puzzle: Collaboration among enabling areas for impact (includes lunch)	Elective
8:30–9:30a.m.	Classroom—Global employment tax: From compliance to strategies for managing (2 offerings available)	Elective
	Classroom—Recent tax developments impacting global assignment programs (2 offerings available)	Elective
	Classroom—Corporate transactions: Strengthening capabilities to deal with global tax, rewards and talent issues	Elective
9:30–9:35a.m.	Transition	
9:35–10:35a.m.	Classroom—Mobile employee US employment tax obligations: From fact to fiction (2 offerings available)	Elective
	Classroom—Tackling business travel compliance: Building momentum for change	Elective
	Classroom—Canada: The changing tax landscape	Elective
10:35–10:45a.m.	Break/transition	
10:45–11:45a.m.	Classroom—Mobility payroll: Getting it right (2 offerings available)	Elective
	Classroom—Economic outlook: What is on the horizon?	Elective
	Classroom—Country spotlight: Recent developments in Argentina, Brazil and Mexico	Elective
11:45–1:00p.m.	Lunch	All
1:00–2:00p.m.	Conversation #2—Diversity & Inclusion	Elective
	Classroom—“White glove” service: What is the appropriate level of service to provide to your senior executives?	Elective
	Classroom—Recent tax developments impacting global assignment programs (2 offerings available)	Elective
	Classroom—Mobile employee equity compensation: advanced strategies and payroll execution	Elective

Agenda (continued)

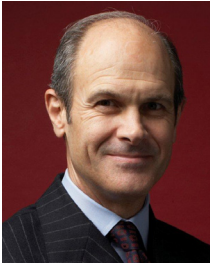
Thursday, February 23rd, 2017

Time	Session	Attendance
2:00–2:15p.m.	Break/transition	
2:15–3:15p.m.	Debate—The digital divide: Will digital technology revolutionize the mobile employee experience?	Elective
	Classroom—BEPS: Potential impact on a global employment company's role in facilitating mobility	Elective
	Classroom—Global employment tax: From compliance to strategies for managing (2 offerings available)	Elective
	Classroom—Tax legislative outlook: Post-election perspective	Elective
3:15–3:30p.m.	Break/transition	
3:30–4:30p.m.	Debate—Global mobility policy design: Flexibility vs consistency	Elective
	Classroom—Mobility payroll: Getting it right (2 offerings available)	Elective
	Classroom—Enabling growth at Facebook	Elective
	Classroom—Mobile employee US employment tax obligations: From fact to fiction (2 offerings available)	Elective
4:30–6:00p.m.	Personal time	
6:00–6:30p.m.	Travel via Coach bus to Miramar	All
6:30–8:30p.m.	Evening event and dinner reception	All
8:30–9:00p.m.	Travel via Coach bus to Marriott	All

Friday, February 24th, 2017

Time	Session	Attendance
7:30–8:30a.m.	Breakfast	All
8:30–9:30a.m.	Industry breakouts	Clients only— by industry
8:30–9:30a.m.	GES Global Update	Deloitte only
9:30–9:35a.m.	Transition	All
9:35–9:45a.m.	Closing from Deans	Plenary
9:45–11:00a.m.	Conversation #3—Game Changers	Plenary
11:00–12:30p.m.	Lunch	All
12:30p.m.	Departures/client service meetings	

Keynote speakers



Geoff Colvin

[Geoff Colvin](#) is an award-winning thinker, author, broadcaster, and speaker on the most significant trends and issues impacting business and the economy. As *Fortune* magazine's Senior editor-at-large, Geoff has an insider's perspective fueled by long-standing relationships with the world's top leaders in business and government.

Currently in his fourth decade at *Fortune*, Geoff's breadth of experience is impressive. He is one of journalism's sharpest and most respected commentators on leadership, management, globalization, regulation, corporate governance, the economy, human performance, and related issues. His regular column and frequent cover stories in *Fortune* have earned him millions of loyal readers.

As a panel moderator, emcee, and interviewer, Geoff's subjects have included Henry Kissinger, Richard Branson, the Prince of Wales, Bill Gates, Alan Greenspan, George H.W. Bush, George W. Bush, Henry Paulson, Ben Bernanke, and many others.

Geoff's latest book, *Humans are underrated*: what high achievers know that brilliant machines never will, examines the trend of technology displacing more jobs than it creates and how people will create value for their organizations and their careers in the changing economy.

A native of Vermillion, South Dakota, Geoff Colvin is an honors graduate of Harvard with a degree in economics and earned his MBA from New York University.



Mike Abrashoff

[Mike Abrashoff](#) is at the center of one of the most remarkable modern day stories of organizational transformation. At the age of 36, the Navy selected Mike to become Commander of USS Benfold. At the time he was the most junior commanding officer in the Pacific Fleet, on a ship that was plagued by low morale, high turnover, and abysmal performance evaluations. Few thought that the ship could improve—yet 12 months later it was ranked number one in performance—using the same crew. The lesson was clear: leadership matters and culture is everything.

In many ways the USS Benfold serves as an extreme example of the same problems facing many organizations today. This is why dozens of publications including *The Wall Street Journal* and *Fast Company* have cited Mike's story as an inspiring lesson for business. Leaders especially identify with Mike's being accountable for results in an environment where he could not make the rules.

Prior to commanding USS Benfold, Mike served as the Military Assistant to Secretary of Defense William J. Perry. He also helped draft the air defense plan for naval forces in the Persian Gulf in 1990, coinciding with Iraq's invasion of Kuwait, as well as served as the Executive officer of the Cruiser Shiloh, deployed to the Persian Gulf in support of United Nations sanctions against Iraq.

Mike is founder of Aegis Performance Group, a consulting firm that works with and supports leaders as they address leadership, talent, and performance challenges within their organizations.

Session formats and focus areas



The Collaboration Zone

A leisurely stroll through interactive vignettes on current issues facing global mobility professionals, The Collaboration Zone was designed to provide you a variety of ways to learn. You will listen to case studies, interact with technology, network with your peers, and hear from Deloitte subject matter specialists. Zones will include the latest advancements in mobility analytics, innovative and practical approaches to employee experience, country spotlights, and a technology zone to see the latest in mobility program technology solutions.



Classrooms

Take a deep dive into current technical topics and how-to sessions with subject matter specialists and hearing from peers on the latest global mobility, talent and rewards issues facing today's global mobility programs.



Debates

The debates, moderated by Geoff Colvin, renowned author and commentator on business and economic issues, and senior editor-at-large of *Fortune* Magazine, allow you to consider alternative points of view on critical issues in global mobility. With insights on all sides of each issue, you will leave better prepared to face current and future issues posed by your globally mobile workforce.



Industry break-outs

Take the opportunity to connect with peers in your industry throughout the conference. Specific times have been identified in the agenda to facilitate networking with peers and hear from Deloitte's industry leaders on the latest issues impacting your industry.



Conversations

Be inspired as Geoff Colvin, renowned author and commentator on business and economic issues, and senior editor-at-large of *Fortune* Magazine, moderates panels with senior executives in the following sessions:

- Conversation #1 CHRO priorities (plenary)—Listen to a panel of Chief Human Resource Officers as they discuss top-of-mind, HR priorities of today in order to realize the HR priorities of tomorrow.
- Conversation #2 Diversity & Inclusion—Diversity in the workforce presents unique opportunities and challenges. Thought leaders discuss how integrating diversity and inclusion into your global mobility strategy can expand the strategic impact of your organization's broader talent and business goals.
- Conversation #3 Game changers (plenary)—What game changers will pave the way for the future of mobility? A panel of subject matter specialists in artificial intelligence, robotics, and virtual reality shares how we need to rethink what the future may look like.



Greenhouse Labs

Join us for a [Deloitte Greenhouse Experience](#) which changes the way you can solve today's business challenges. The Greenhouse takes you outside of your everyday environment, disrupting conventional thinking, spurring creativity, and bringing about new perspectives. Attendees should plan to attend this immersive and interactive session which will include exercises based on behavioral research, social psychology, and group dynamics so to engage you on an individual, as well as team, level.

Early registration for the Greenhouse Labs is encouraged as space is limited and will be on a first-come, first-served basis. Due to space limitations, Deloitte professionals are restricted from attending.

Focus areas described:

- Strategic: Sessions described as strategic are aimed at participants in decision-making roles with a focus on driving agendas within the business, ensuring mobility has a place in strategic decisions. These will explore topics at a conceptual level and touch on the impact of mobility across the business.
- Operational: Sessions described as operational are targeted to participants with an interest in exploring the practical considerations of the day-to-day management of mobility programs, including the roll of policy, implementation of process, and the successful delivery of tax and mobility services.

Classrooms



Title	Description	Focus area
BEPS: Potential impact on a global employment company's role in facilitating mobility	As countries enact legislation to align with the OECD Base Erosion and Profit Shifting concept, questions arise as to how deployments of personnel will be impacted. We will have a panel of mobility, international tax and transfer pricing specialists discuss the potential impacts BEPS on the deployment of personnel, including the impact to the operating models of global employment companies.	Strategic & Operational
"White glove" service: What is the appropriate level of service to provide to your senior executives?	In this session we will focus on current trends in the provision of global compliance and advisory services to senior and C-suite executives. Over recent years we have seen an increased demand for a differentiated service offering for this population of mobile employees. We will review these trends and approaches to providing services to this population including some insights into common issues and challenges in responding to the specific needs of these individuals.	Strategic & Operational
Canada: The changing tax landscape	In this session you will hear from our country leaders in Canada who will provide recent tax developments on issues impacting your mobility employees in and out of Canada.	Operational
Corporate transactions: Strengthening capabilities to deal with global tax, rewards and talent issues	Business transactions often trigger changes in global mobility programs, compensation, benefits and payroll arrangements. Employers have a window of time to address global considerations and act in order to mitigate risks, reduce costs and optimize opportunities. Join us for a dialogue about key global, tax, talent and rewards issues and what you can do within your organization to support a successful transaction.	Operational
Country spotlight: Recent developments in Argentina, Brazil and Mexico	In this session you will hear from our country leaders in Argentina, Brazil, and Mexico who will provide recent tax developments on issues impacting your mobile employees who are deployed to/ from these locations.	Operational
Enabling growth at Facebook	Across industries, global mobility teams are working to better align to their organizations' business priorities, and to enhance their value and impact. The Facebook global mobility team (GloMo) has been on this journey and is now considered a key strategic business partner at Facebook. Join a discussion with the Facebook GloMo Tax Programs Lead [and the Facebook GloMo Director] to hear the challenges they have faced, how they define their value in the organization, and the direction they see for their team.	Strategic
Global employment tax: From compliance to strategies for managing	In this session, we will discuss why organizations are increasingly wanting to achieve global visibility, management and control of their employment tax compliance and the strategies they can use to do this. Specialists from our global employment tax team will set this against the global employment tax compliance environment and upcoming/recent significant legislative updates so participants with global responsibility can get up to speed on the developments that may most matter to them.	Strategic

Classrooms (continued)



Title	Description	Focus area
Mobile employee equity compensation: Advanced strategies and payroll execution	<p>The complexity related to mobile employee equity has been well chronicled and the subject of dozens of presentations over the years. Rather than going over old ground, in this presentation our speakers will focus on some of the more advanced but equally important aspects of mobile employee equity compliance, specifically:</p> <ul style="list-style-type: none"> • Tax planning: Balancing compliance and employee experience • Payroll execution and common challenges: both US (multi-state income reporting) and international • Data collection and tracking • Change management: Managing employee expectations and internal stakeholders • Technology implementation challenges and tips 	Strategic & Operational
Mobile employee US employment tax obligations: From fact to fiction	<p>In this session, we will focus on the US employment tax requirements associated with both inbound and outbound expats. We will help distinguish fact from fiction when it comes to your US compliance obligations. This session will help you understand when “common practice” may not align with regulatory obligations, and highlight what is happening in the area of employment tax audits.</p>	Operational
Mobility payroll: Getting it right	<p>Payroll—gross to net delivery, its related tax compliance, and proper reporting of all—is one of the most visible and complex operational processes for a global organization. Layering in the requirements for managing this process in multiple jurisdictions for a globally mobile workforce, many organizations struggle with establishing a sustainable infrastructure where the process is viewed as a success by its sponsors and stakeholders. This session will focus on key issues impacting mobility payroll operations and tax compliance and be led by our employment tax and global compensation specialists.</p>	Operational
Recent tax developments impacting global assignment programs	<p>In this session, we will focus on tax changes in select countries that could impact the cost and complexity of international assignments. As countries struggle to maximize tax revenue, many of the considerations for tax planning have disappeared. In addition, other developments (e.g. Brexit and the falling GBP and Euro) are impacting the tax bills of employees. We will survey these changes and provide insight on how to help your assignees cope while keeping your costs under control.</p>	Operational
Tackling business travel compliance: Building momentum for change	<p>With a multitude of risks to manage and stakeholders to appease, the development of a business travel program can be a daunting endeavor. Many organizations experience paralysis as they cannot answer the most basic questions:</p> <ul style="list-style-type: none"> • Who are our business travelers? • Where are they traveling? • What risks arise as a result of their travel? <p>This session will examine how global mobility leaders can galvanize multifunctional teams to drive change and move the compliance meter for their organizations and employees.</p>	Operational

Debates and conversations



Title	Description	Focus area
Global mobility policy design: Flexibility vs consistency	Increasingly, global mobility leaders need to choose between two fundamental approaches to the design of their international assignment policies: either offering a consistent approach with a defined set of benefits and an exception management process; versus a more flexible approach where the business or the employee has the ability to tailor individual assignment benefits to meet their specific needs. Please join our panel of Deloitte subject matter specialists and corporate global mobility leadership to debate elements like lump sums, menu-based approaches, and the ever-present need for cost management, and determine once and for all which approach is best.	Strategic & Operational
The digital divide: Will technology revolutionize the workplace?	The increasing integration of digital technologies in all aspects of our lives is both a benefit and a challenge for employers and employees. How does an organization embrace the reality of today's digital world, put it to work, and stay open to future innovations while balancing the needs of its employees? Join us for this debate on whether technology will revolutionize the workplace and how you manage your mobility program.	Strategic & Operational



Title	Description
Conversation #1	Listen to a panel of Chief Human Resource Officers as they discuss top-of-mind, HR priorities of today in order to realize the HR priorities of tomorrow.
Conversation #2	Diversity in the workforce presents unique opportunities and challenges. Thought leaders discuss how integrating diversity and inclusion into your global mobility strategy can expand the strategic impact of your organization's broader talent and business goals.
Conversation #3	What game changers will pave the way for the future of mobility? A panel of subject matter specialists in artificial intelligence, robotics, and virtual reality share how we need to rethink what the future may look like.

Greenhouse Labs



Title	Description	Focus area
<p>Employee experience – how can you enhance the experience for your mobile employees?</p>	<p>Join us for a Deloitte Greenhouse Experience where we will challenge the question of “How can organizations enhance the mobile employee experience to elevate the mobility program’s reputation both inside and outside of the organization?” Our Greenhouse Experience changes the way you can solve today’s business challenges by taking participants outside of your everyday environment through a session that will disrupt conventional thinking, spur creativity and bring about new perspectives. Attendees should plan to attend this immersive and interactive session which will include exercises based on behavioral research, social psychology, and group dynamics to engage both as an individual as well as in a team. Seating is limited and is on a first-come, first-served basis.</p> <p>Desired outcomes for participation in this lab will be to:</p> <ol style="list-style-type: none"> 1. Walk in the employee’s shoes for a new perspective on mobility 2. Explore innovative and practical approaches to designing the employee experience 3. Adapt concepts to fit specific culture, scale, and priorities of your organization 4. Identify opportunities for positive impact and a plan for implementation for your mobility program 	<p>Operational</p>
<p>The mobility puzzle: Collaboration among enabling areas for impact</p>	<p>Organizations are facing fast and fundamental changes in the global business and talent landscape. Leaders need quick, effective, and holistic talent solutions to keep ahead of the complexity and competition. Global mobility, with its broad reach and deep cross-border talent expertise, is well positioned to partner with other enabling areas to support an integrated view of talent, while delivering an exceptional experience to the business and employees. In this lab, we will explore how mobility fits into the broader talent lifecycle, including a holistic view of global talent supply and demand, and why mobility leaders and professionals should team up with other enabling areas to affect change and support strategic business and talent priorities. Seating is limited and is on a first-come, first-served basis.</p> <p>Desired outcomes for participation in this lab will be to:</p> <ul style="list-style-type: none"> • Understand and articulate how mobility fits into the broader talent lifecycle • Identify business and talent priorities where mobility can have the highest impact, including practical ideas to affect change • Create a personal plan of action to build relationships and increase collaboration within your organization 	<p>Strategic & Operational</p>



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