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CHAPTER

1

DIGITAL SOLUTIONS FOR ANY TYPE OF HR DEPARTMENT



Learn how...

- Digital HR services are critical to delivering rapid business growth in India
- How digitalization is freeing up HR employees to work in other more pressing areas globally
- How digital services are helping HR departments companies comply with an increasingly complex regulatory environments

HR is changing fast, driven by technological advances, an evolving compliance landscape and the demands of a new generation of employees who view the world differently.

Increasingly, CEOs and HR Directors are seeing the business benefits of changing the way things have been done in the past, embracing digital solutions which save time, make life easier and, in the longer term, deliver financial savings, too.

This white paper is designed to highlight and explore the new solutions available, no matter where your business is on the digital timeline and no matter where your business is based.

Digital solutions are as relevant for companies whose information is still on paper and stored in a warehouse as they are for businesses which already have content management systems in place.

These solutions can be utilised across all departments, but many businesses start with HR – which collects and stores the most personal or sensitive data.

Do different countries need different solutions?

Regardless of territory, whether you're operating in India, Europe, Asia or North America, the principles of HR are the same right across the world.

There may be nuances in IT, regulation, and compliance but the bottom line is that HR is there to serve existing and potential employees in a wide range of functions. Each individual function has its own challenges, and these can

differ across regions and industries. But the list of functions is similar wherever you go, and what underpins all these elements is the need to store and retrieve data.

The first step

It should come as no surprise that the first step to digitising and modernising HR services is to store that information digitally and electronically. Allowing the user to access it whenever it is needed. That's where modern HR services begin.

For some businesses in Europe and the UK it's a step they took a long time ago, and the focus is on introducing new digital solutions to support individual functions or enhance and update current systems.

For others, still reliant on physical storage solutions, it's time to begin the journey.

INTRODUCING ECM - ENTERPRISE CONTENT MANAGEMENT

The key to digital solutions in HR is an overarching system which gathers information from across the business and distributes it automatically to those who need it — creating automated workflows which are easy to access and manage.

We call it ECM, Enterprise Content Management, and that's the phrase we'll be using in this white paper.

But it has many different names. You might hear it called Electronic Content Management or even just content management, for instance. It first came to attention in the early 2000s when Microsoft brought out SharePoint, but ECM has come a long way since then.

Can I keep heritage systems?

New digital services don't need to replace heritage systems, they can work with them to fill the gaps.

For instance, a finance system may well manage how you pay your suppliers and receive money from your customers. But it doesn't automate many of the business functions associated to it. That's where ECM comes in. It provides integration into existing technology, which means you can leverage what you've already invested in rather than scrapping it and starting again.

DIGITAL ARCHIVING

Digital archiving is the heartbeat of HR digital services. In its most simplistic sense, you can think of it as an electronic filing cabinet.

Many HR teams will already have something in place, no matter where they are in the world. For those which don't, it's a very important first step.

REPORTING

The other element of digital archiving and ECM is reporting. An information dashboard means an HR director can, at any point, have an in-depth understanding of what's going on relevant to their business, whether that be the HR function and the team itself, or how that's impacting the wider business. For instance, training that's being provided or employee survey stats.



CHAPTER

HR DIGITAL SOLUTIONS - FUNCTION BY FUNCTION

Having ECM in place has the power to transform all HR functions, bringing them together under one umbrella and using automation to simplify processes.

It has a positive impact on compliance for all functions, ensuring that data is kept securely for the right amount of time and follows data protection regulations.

Here we assess, function by function, how digital solutions can benefit HR – taking data on a journey all the way from the arrival of an employee to their departure from the business...





By beginning the digital process with recruitment, when employee data is first collected, a system can be put in place which looks after that data for its entire lifespan.

The business challenge:

A manual recruitment process is challenging and time consuming. Getting the job role authorized by senior management, putting together a job spec, reaching out to agencies, uploading to online job hubs such as LinkedIn.

All of these involve manual processing, a lot of emails and a lot of management.

Then you receive CVs and must communicate to applicants before the interview process even begins. Finally, there is the job offer and a mountain of admin associated with onboarding.

The solution:

An automated process brings all these steps together. The authorization step is now a dynamic job requisition form — no emails — which takes minutes rather than hours to complete.

HR is included in this process, and automatic job descriptions/specs are created and distributed.

You can also browse a database of CVs from a digital system rather than relying on a HR Manager to keep old CVs in a drawer.

It's easy to find where the stats on staff churn are, where the salary brackets are kept — and a dashboard overview allows you to answer questions such as "how much is my organization spending on recruitment agents?"

The business benefits:

Saving time is a key issue because there are fewer emails, less manual input, and less need for day-to-day management. This frees up employees to work on more important tasks.

Having a digital recruitment process is important in terms of generational recruitment, too.

Millennials and Gen Z applicants expect an endto-end digital process; and the employer branding of a company suffers if recruitment methods seem archaic.

The HR impact on other departments can improve efficiency, too. IT managers will know immediately when there's a new hire because an automated notification is sent.



The business challenge:

Recruitment requires a lot of personal data to be collected and brings with it compliance issues.

It starts with making sure the person you are paying has the right to work and that you are paying them in the correct currency — and into a bank account that is live and valid.

In the UK this might be a P45 or P60, a copy of your passport or driving licence, or if you are a foreign national your right to work documentation or visa.

This data needs to be shared between different departments – for instance HR and finance – and often this is achieved through a flurry of emails which are not secure and add to data risk

The solution:

An ECM system will take those documents and automatically start a process which securely sends them to payroll, along with national insurance numbers, names, and addresses — and to any other department which requires them.

It can manage permissions, only allowing those who need to see the data to view it. All without human input.

The business benefit:

There is no longer a disconnect between departments – and no longer a need for multiple email exchanges, which take longer and can be a data threat.

There is also less time spent inputting data and copying over names and addresses. Data is stored securely, quickly retrieved and only visible to those with the correct permissions.



The business challenge:

Once an employee is on board, they will often be trained – and records kept on how they are doing. These need to be securely stored, accessible and editable.

Some training may be mandatory for health and safety or insurance purposes, so HR needs proof of who has undertaken it and who has not.

Solution:

An ECM platform will be able to provide online training materials, whether that's videos, presentations, or digital learning, for instance, and run them for you.

It can provide a selection of questions for the end user, randomised to ensure knowledge retention and to prevent them skipping through modules. The added benefit of using ECM for this function is the provision of scheduling and reporting. Take ISO9001.

This must be updated and repeated on a yearly basis, so being able to schedule a refresher training course and automatically have it emailed is valuable. People can then click through direct from their email to take the module.

The business benefits:

The key benefits are ease of use and ease of access. It also encourages employee self-service, which means HR doesn't have to be at the centre of administrating the process. The role of HR is limited to top-down management and utilising human resources to target areas where there are issues.

Reporting tools mean HR can quickly see who has undergone training and who hasn't – and raise it to their manager if necessary. The report can provide stats on KPIs such as percentages of courses completed.

This is especially useful in a global organisation, which can compare results from one region against another – allowing the HR team to focus on those most in need of help.



EMPLOYEE RELATIONS AND COMMS

The business challenge:

Sending out business news to all employees can be simple enough, but sending individual messages is time consuming.

Keeping up with house style and branding is also a challenge.

In fact, one of the most difficult aspects is version control. There may be three or four versions of key comms information in the folder, but which is the right one? When was it updated? Are the correct templates being sent out?

The solution:

Having ECM in place allows data to be version controlled so everyone knows which is the right file. It can link seamlessly to HRS systems or payroll and the process is much smoother.

It can also manage automated email campaigns, saving time.

The business benefits:

With the right system in place, employees will only see the correct and updated version of important documents. Any revisions will be managed only by the ECM platform so there is one single version of the truth.

When it comes to training, ECM can provide dashboard information on who has taken each session and how many have passed. It aids compliance and governance and places the onus on employees to complete the tasks without the need for HR intervention.



ANNUAL LEAVE AND EMPLOYEE BENEFITS

The business challenge:

Keeping track of annual leave is time consuming. Just the process of booking and providing permission can be complicated, even in a small business.

For larger operations it is a significant drain on time. Employee benefits bring similar challenges, especially as the benefits may vary depending on job role, length of service and remuneration.

The solution:

A digital system can manage annual leave and employee benefits. One solution is an employee dashboard which allows employees to see all their information in one place – how much they are paid, what their benefits are (for instance free eye tests, help lines etc), how many days of annual leave they are entitled to and how many are remaining in the calendar year.

It gives an employee a holistic view of their employment. This is another example of how ECM doesn't have to always solve a problem.

Sometimes its role is to pull information from lots of different places and systems – and then bring it together to make life easier for the HR team and for employees.

The business benefits:

Providing employees with easy to access and easy-to-understand information helps reduce stress and make life simpler.

The value for HR comes in a reduction in the number of enquiries, phone calls and emails relating to the information that employees can now find easily and quickly by themselves.

They may be able to book their annual leave online, for instance, on a system which tells them which days are available and which are not – saving elongated conversations with HR.

The system makes approval simpler - an email will automatically be sent to the correct manager, with a link to click. Dashboards for employee benefits can also play a role in increasing awareness and uptake of key benefits.



PERFORMANCE EVALUATION AND EMPLOYEE RECORDS

The business challenge:

These records include some of the most sensitive data in the system, including personal employee information which is valuable to cyber criminals and details of disciplinary issues which are legally sensitive.

Businesses need to know how long to keep data from disciplinaries (it may be only six months or a year in some circumstances). But it can be vital data when it comes to an employment tribunal.

The solution:

An ECM system can ensure that sensitive disciplinary data is encrypted and secure – and that only the relevant people are granted access to it.

For instance, if an employee had a disciplinary issue within the organization and thenmoved department, the new manager may not necessarily be entitled to see any previous written or verbal warnings associated with the case.

When it comes to performance evaluation, the system can automatically set up annual reviews and compare data across an employee's service.

The business benefits:

This system removes risk when it comes to compliance and auditing. Everything is in one place, there are no filing cabinets to go through, no pieces of paper left on somebody's desk with sensitive information on them.

It is just as relevant for employee performance evaluation as well as discipline. Having data at your fingertips is beneficial for managers when explaining decisions. Employees can be shown on screen how they have achieved performance targets. Or if they are not delivering, help can be provided.

One of the most important factors in HR is who sees what. Not everybody in the business needs to know how much colleagues earn or see disciplinary files.

An ECM system can mask and hide information depending on permissions attached to it.



The business challenge:

Facilitating the departure of an employee involves a lot of data.

Imagine all the data collected around an individual over the course of their business life. Some will need to be kept by law, other files must be destroyed within a certain timeframe.

Ex-employees leave behind computers, laptops and mobile phones packed with sensitive data and it's a challenge to ensure none of it is compromised.

You might also need to consider physical data – on uniforms and ID cards, for instance.

The solution:

Automating processes not only saves time but also aids compliance. ECM can assign a retention policy to every bit of data held on an individual and manage the leaving process.

It can automatically update reports, cancel benefits such as gym memberships or health insurance. It can even contact customers to let them know their main point of contact is changing.

The business benefits:

Many of the tasks described above used to be undertaken manually and took up a lot of time. But with ECM much of it happens instantly and more securely.

CHAPTER

AROUND THE GLOBE WITH CROWN: DIGITAL HR SERVICES IN ACTION

There's nothing more valuable for a business researching HR data solutions than to see how other companies have solved their business problems and to hear from experts who manage solutions for those clients.

Here we talk to Crown Records
Management experts from around
the world, outlining the challenges
and data background in their region.





INDIA: HOW DIGITAL HR SERVICES ARE KEY TO DELIVERING RAPID GROWTH



Antony Anand Head of Digital, South Asia

What are the key HR challenges faced by businesses in India?

The most popular solutions we provide are related to how to organise data, including physical files. For organisations of more than 1000 employees it is becoming increasingly difficult for them to manage files without a digital solution. Especially when the files include many mandatory documents.

When doing a physical audit, a checklist is prepared and updated. But if that checklist is lost then everything must be done again. Or perhaps you maintain an Excel document which can become corrupted.

So, the very first solution is to digitally organise and archive data which is already being managed. Then you know what mandatory documents are present and which are not.

So, what does the Crown Records Management team do for those type of clients?

Our team would primarily take care of digitising the documents while also providing consultancy on how documents should be categorised and uploaded on the system.

We will then provide the client with 'one click' access to documents. This was especially important to clients in the pandemic because employees needed quick access to physical files.

Even now, many people in India are still working in a hybrid model. So, digitisation of data and digital archiving is very important to them. It improves organisational efficiency.

It allows them to recruit staff more quickly, more transparently and consequently, grow more efficiently as a company.

What's the biggest driver for digital solutions in India?

The big one in India is audits. In many other areas of the world there may be only one audit a year. In India there are at least four — and in some cases up to eight!

This is one of the major reasons that businesses have to keep files and one of the biggest reasons they need to digitise.



It allows them to recruit staff more quickly, more transparently and consequently, grow more efficiently as a company.





Antony Biondi Head of ECM, UK & Ireland

What's the biggest reason that HR needs digital solutions?

The biggest problem for HR fundamentally is the amount of time spent processing things they really don't need to. Too much time spent copying information from one system to another, for instance.

Research by formstack in 2018 showed that 55% of managers were still spending eight hours a week on manual, repetitive tasks, which is crazy. You would expect that figure to have 'improved' four years on, but I'm not sure it really has.

So, does digitising HR functions save money?

It's not just the cost to consider. Imagine the list of business-critical tasks those same employees could have been focusing on if they had more time.

Embracing digital solutions can certainly save businesses money in the long term, but it would

be wrong to suggest that financial savings should be the primary driver for change.

Installing a digital solution is a significant investment for most companies and they do it to be compliant, to save time and to make access to data easier.

All those aspects can lead to financial benefits if your business remains compliant and avoids future fines. Or if your employees no longer spend wasted hours trying to find and retrieve data — and can use the time saved to be more productive. They can then use this time to tackle other pressing issues where HR resource is sorely needed. For example, building more effective employee engagement and developing an employee-centric company culture at a time when we're seeing record staff turnover.

The saving of man hours and making the life of employees simpler is often a big focus.

Does Crown use digital archiving in its HR department?

That's an important question. There are many benefits to digital archiving and many reasons to start the journey; but for us there has been an extra one. When going to market with new digital products we want to be able to say 'we know you have these problems, and we know how to resolve them because we've done it ourselves. And we know the business benefits of them.

That's what inspired an internal HR project at Crown Records Management in the UK. We started by taking all our existing HR documents past and present, and digitising them, so that everybody who needs access to them can do so more quickly on a digital platform.

Just as importantly, from a compliance perspective, we're taking the sensitivity of these types of documents very seriously.

Can you give an example of how the new system will save time and make life simpler?

Phase Two is looking at our recruitment process – and that's a good example.

Under the old system this might begin with a job description document which is emailed to multiple people and the responses shared internally between managers. It then goes to the HR department and there may be multiple communications around it. The entire process takes days if not weeks.

Once services are digitised you can create a job request via an e-form and get the relevant workflows in minutes. As soon as that job request has been requested, it will be distributed to the relevant parties such as recruitment agent, our own HR team, or our website.

That person then goes through an interview process and the entire process is documented digitally. Notes are made, then references added, then the contracts. All of that is distributed via an electronic platform where workflows happen.

Do you feel other businesses could benefit from the same approach?

I really do. Most organisations that don't have a digital approach or a digital archive solution have messy and convoluted process in place — often with no real control over them and little visibility. It's an important step to take to stay competitive.



They can then use this time to tackle other pressing issues where HR resource is sorely needed.



What are the biggest data archiving issues for HR in the APAC region?

Countries in this region, for instance the Philippines, Singapore, and Malaysia, are mostly required by government to keep paper records of employee files and other government transactions for seven years.

So, storage space and retrieval are an issue, especially for audits. It's one of the reasons so many companies have resisted going digital until now. But things are changing. Digital copies are preferred by Human Resources, for easy access, and what is commonly done is files are stored in shared folders or on OneDrive.

What questions do you get asked the most by clients and prospective clients?

It is mostly about storing HR documents or employee files. They need to be reassured that confidentiality and their own records and data are protected. Encryption and access rights are part of the solution, ensuring that only those who need to see documents have access to them.

HR departments are also concerned about certifications from government bodies, such as the Department of Labor.

Then there are also questions about ease of access. It's important to have systems which can pull out algorithms, metrics, and analytics. If you can spot patterns of employee and organisational behaviour you can interpret and make decisions based on those finding.

How do you think HR data challenges in APAC differ from other parts of the world?

Country requirements, legislation and rules differ from one another. Developed countries will have more stringent requirements, while developing countries can have different interpretations of their labor or corporate laws.



Noreen TerrenteSenior Human Resources
Manager, Asia-Pacific

This means, there is more requirement for customisation in the product or system provided. It might need to be tweaked for each country or cluster of countries (such as New Zealand, Australia and Greater China).

Do you think HR is changing?

I do. HR professionals are now multi-domain consultants and are expected to solve problems in real time – and quickly. HR will certainly need to be data-driven in future and that requires embracing new technology.

Are there any signs that digital solutions will be more popular in the near future?

It is everywhere. The need for integration, the extent to which users in a system can share the same data, is becoming more of basic operational necessity nowadays. Especially when it supports HR functions and enables HR to gather, store, maintain, retrieve, revise, analyze, and report HR data. It's inevitable that more business in the region will get on board.

HR DIGITAL SOLUTIONS IN ACTION: A CASE STUDY FROM INDIA



Sridhar Nuti Vice President, HR & Technologies, Adani, India

Sridhar is an accomplished HR executive with more than two decades of expertise in HR leadership. He has been in his current role with Adani Electricity Mumbai Ltd since 2019 and with Adani Group since 2009.

Can you describe briefly what your business does and your personal position in it?

We are one of India's largest private power distribution companies, serving around 2.5m consumers in Mumbai City.

The company is also part of the M/s Adani Group, the largest diversified conglomerate with a market cap of more than 213.32 billion (as of April 2022) comprising seven publicly listed companies, with an HQ in Ahmedabad, Gujrat.

I am working as Vice President- HR & Technologies, and in this role, I have a mandate to partner and drive enterprise-wide business transformation programmes.

What was the business need which prompted you to consider digital solutions?

As part of Adani Group's vision, we aim to be major contributors of infrastructure building in India. As part of this mission, we would like to leverage, enterprise-wide digitisation by replacing or removing all manual and duplication processes.

In this endeavour we have partnered with Crown Records Management to explore document digitisation processes.

What did you want to achieve?

The aim was to convert manual records into digital records. The outcomes we looked for were quick accessibility and retrievability, plus to improve the speed and quality of job deliverables. HR legacy records are used frequently in the business.

Why did you decide this was the right moment for change?

As mentioned, we are on a journey of achieving enterprise-wide digital transformation. This means connecting all the dots, including:

- a) Business Operating Model
- b) Processes
- c) Technologies / automation
- d) The people side of readiness

In this journey, the digitisation of records plays an important part - so DMS is crucial.

What solution did you choose with Crown?

After a lot of research, product reviews and assessments we were able to zero down on Crown and chose Crown's DMS solution.

Our experience since then has been very good and there were no major obstacles witnessed during the implementation process.

What have been the business benefits of the new system?

It is too early to provide statistics. However, the DMS system readiness has been a great help — especially in the management of HR service deliveries, where employees can access their records alongside their data in System of Records.

Additionally, wherever senior leadership needs quick access of an employee's p-files or employee benefits-related documents we are seeing far quicker access and record retrievability.

The system is very nimble. and you know you are accessing an accurate document rather than trusting manually prepared data points without any proof.

What is the next step on the digital journey?

The digital transformation journey is a continuous one. Organisations must get ready for constant engagement; therefore, we are exploring the adoption of latest technologies and system upgrades.

It is increasingly essential to focus on FOW (Future of Work) capabilities. Therefore, changes in work design/workplace shift/workplace engagement are vital. These three facets are driving businesses to adapt new technology. We are currently involved in enterprise mobility adoption and AI & RPA.

We are already exploring the transformation of our Administration and Facility Management area with Crown.



GETTING STARTED: A HR DIGITIZATION ROADMAP



Undergo a data audit

The very first process to undertake, even before deciding which functions can benefit from a digital solution, is to undertake a data audit to find out what data you have and where it is.

This is relevant no matter whether the data is physical, for instance on paper, or electronically stored.



Scan your physical data into a digital archive – and embrace ECM

For businesses which store a lot of data on paper, there really is only one solution to get the process started – and that's scanning.

This involves taking the physical data and turning into an electronic format so it can be accessed quickly, stored safely and automatically passed into an ECM system to kick off workflow systems.

For businesses which already have data stored electronically, for instance in an HRS (Human Resources Services) system such as Workday, the process begins by sending that data automatically into an overarching ECM which then manages workflows.

So, if you create a new file for a new employee in HRS, your new ECM system will automatically notify payroll. When they leave, it will notify payroll again, move the employee file from an active employ to an ex-employee and attach a retention policy to it so it is destroyed after a relevant amount of time. The systems work together.



Put a retention policy in place

How long you keep data is a big issue which touches both compliance and risk.

So, it is vital that all data in a business is attached to a retention policy which sets a date for its secure destruction.

In general, data should not be kept for longer than is required, because it comes with risk — risk of it being lost, stolen or corrupted, for instance. It also comes at a price — the cost of storage, the cost of being asked to find or edit it, or even the cost of a fine if it is kept too long.

There are also legal implications if data which must be kept by law is destroyed too soon. In the UK, for instance, most HR records need to be kept for a minimum of 10 years.

HR departments, however, are renowned for keeping records for longer than necessary.



Decide if you want physical and digital data to exist alongside each other

For regions in which companies must keep documents in physical form because of government rules, there can still be digital solutions.

The biggest problem with paper documents stored in boxes is they are difficult to find and slow to retrieve.

There is no reason why you cannot digitise those documents and have a box number associated to the original. When it is time for destruction, the system can alert you to destroy both physical and digital versions – and tell you which boxes they are in.



Assess which HR functions are a priority

HR digital solutions start with the centralization of archived data before ECM delivers a range of workflows which branch off from there.

The system follows employees through their employment, starting with recruitment and ending with their retirement or exit from the business.

Not many companies do everything at once, however. They tend to start with the most basic information in the business, employee files, and add from there.

The most obvious timetable is to follow the employee path from recruitment to departure, adding functions as you go.

CONCLUSION

The role of HR in the success of a business is clear; it can be pivotal in generating employee morale, in attracting and retaining the best talent and in setting the tone for how a brand is perceived from both inside and outside the building.

Now technology brings the ability to extend that value even further.

By digitally archiving data and investing in ECM, HR functions can run more smoothly and efficiently and make an even greater contribution to the health of a company.

Of all the sectors, HR is the one that handles the most personal data, and which touches the lives of employees the most times.

It is also the one which has traditionally featured the most manual tasks: inputting data, sending emails, collecting and copying information, handling contracts, pensions, payroll, employee benefits. The list is a long one.

But ECM can have a huge impact on productivity by automating processes and reducing the number of hours spent on manual tasks. It frees up time for employees to take on roles which are more business critical and more fulfilling.

Saving time is a modern mantra and there are few investments which deliver as much saved time as HR digital solutions.

That is even before we begin to think about compliance and the increasing desire from younger employees to work for a company that embraces technology. Businesses in different regions of the world find themselves at different junctions on the digital road. But with hybrid working a clear global trend following the pandemic, there has never been a better time to take the next step.

It is important is that any solutions chosen are agile and collaborative.

With the world changing so fast, there's value in a workflow centric approach rather than one which focuses on documents or even on technology, which is always evolving.

Whatever systems businesses adopt, the focus should be on identifying problems or challenges — and then delivering easy-to-use solutions that deliver real benefits for everyone in the business.



Get in touch

Crown Records Management helps clients to maximize the value of their "corporate memory" through the storage, active management and timely distribution of information assets.

In 40 countries, Crown provides secure archiving and retrieval of information in physical and electronic format, as well as digital imaging, media management and data destruction.

Crown Records Management is part of Crown Worldwide Group, a privately owned, global logistics company founded in 1965 and headquartered in Hong Kong. An extraordinary and purposeful business committed to making it simpler to live, work and do business anywhere in the world.

If you have any questions regarding this whitepaper, email us at info@crownrms.com.

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