INTERNATIONAL SUCCESS

Selecting, Developing, and Supporting Expatriate Managers

Meena S. Wilson
Maxine A. Dalton

INTERNATIONAL SUCCESS

SELECTING, DEVELOPING, AND SUPPORTING EXPATRIATE MANAGERS

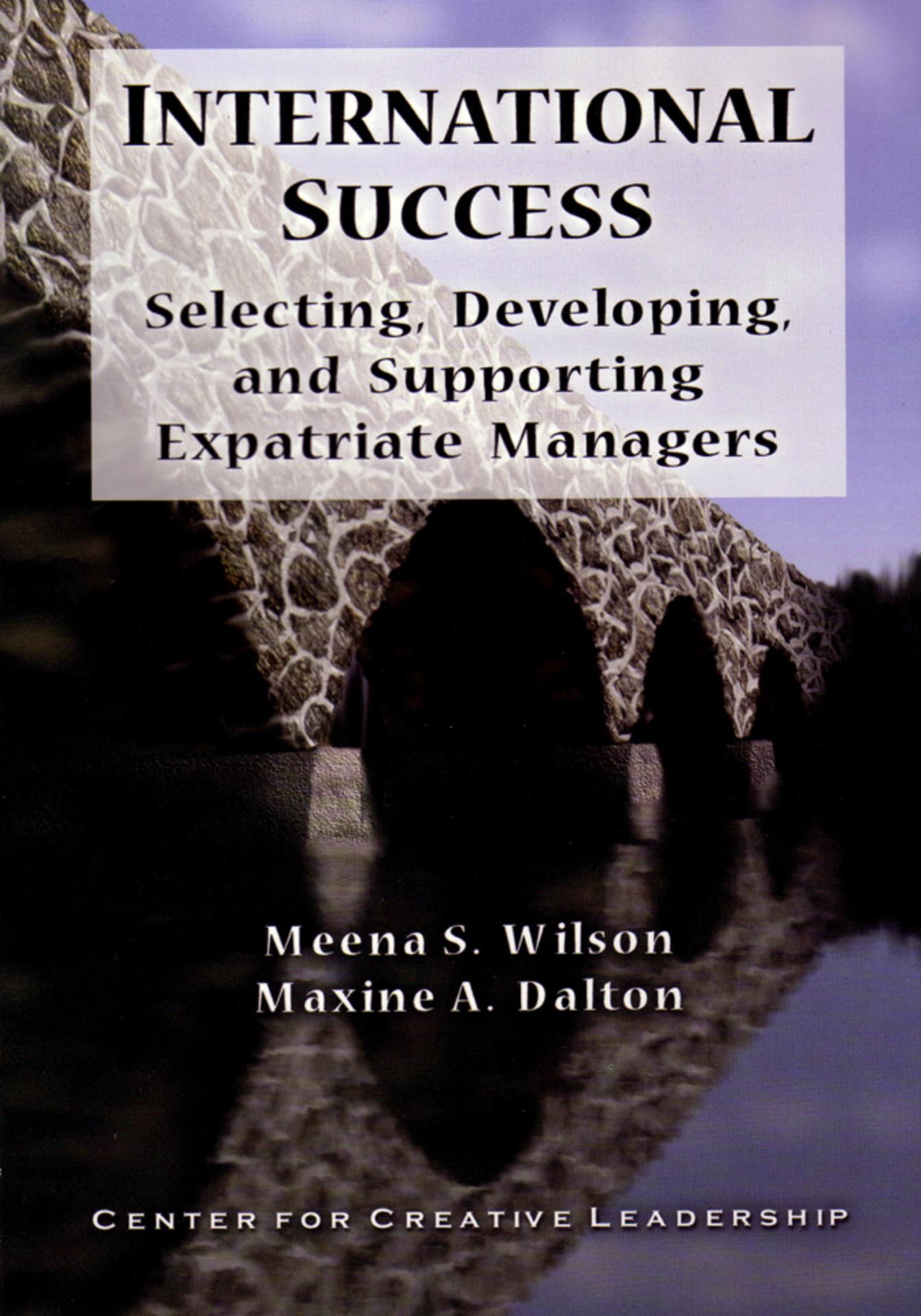# INTERNATIONAL SUCCESS

SELECTING, DEVELOPING, AND SUPPORTING EXPATRIATE MANAGERS

Meena S. Wilson
Maxine A. Dalton

Center for Creative Leadership
Greensboro, North Carolina

The Center for Creative Leadership is an international, nonprofit educational institution founded in 1970 to advance the understanding, practice, and development of leadership for the benefit of society worldwide. As a part of this mission, it publishes books and reports that aim to contribute to a general process of inquiry and understanding in which ideas related to leadership are raised, exchanged, and evaluated. The ideas presented in its publications are those of the author or authors.

The Center thanks you for supporting its work through the purchase of this volume. If you have comments, suggestions, or questions about any CCL Press publication, please contact the Director of Publications at the address given below.

Center for
Creative Leadership
leadership. learning. life.

Table of Contents

Figures

Tables

PREFACE

In 1994 the Center for Creative Leadership (CCL) launched the Global Leadership Research Project. One of the first studies associated with the project was an investigation of the expatriate role. We began by reviewing the relevant academic and practical literature and talking with senior human resources executives from several Fortune 500 companies. These people have primary responsibility for developing managers and making expatriate assignments. They told us that although their organizations were moving relentlessly forward to participate in global markets, their senior managers were ill prepared to live and work successfully outside of the U.S. These managers raised two questions: How can we improve the success rate of our people sent out on international assignments? How do we build the bench strength to staff our organizations internationally?

Once we were clear about their concerns, we responded by conducting a series of studies with expatriates and repatriates. Our purpose was to explore the factors contributing to expatriate effectiveness in order to create baseline information about how companies can build their talent pool for staffing senior international positions.

This report is one product of that work.

ACKNOWLEDGMENTS

INTRODUCTION

As multinational organizations become more common, they play an increasingly potent role in the global economy. The expatriate managers who work for such companies—that is, those who work in a country or culture other than their own—experience great pressures to succeed in their assignments. However, the success rate of many expatriates (especially those from the U.S.) is not high and many leave assignments prematurely. An additional complicating factor is that organizations often fail to provide the support systems that would ensure superior job performance.

It is essential that international companies be better equipped to plan for the success of expatriate managers if they want to thrive in the global economy. But human resources executives and others responsible for expatriate assignments have little to guide them.

This report provides such guidance through sharing a practical framework that we have developed called the *Selection-Development-Support* (SDS) framework. It draws on the results of a series of research studies of expatriates and repatriates and on what practitioners and scholars say about selecting, developing, and supporting effective expatriates. This framework provides a systematic way of considering issues critical to successful expatriate performance.

The three studies we conducted included eighty-nine expatriates from the Americas, Western Europe, and the Middle East, who were deployed to twenty countries. The research was designed to answer two overarching questions: (1) What are the factors associated with expatriate effectiveness? and (2) Can the capabilities needed for expatriate effectiveness be developed? (Appendix A describes the design, methodology, major findings, and limitations of the set of studies. Appendix B contains the interview protocols.)

This report presents what we feel are the best current answers to these questions. First, we set the stage for introducing the SDS framework by emphasizing the high organizational and individual costs of *not* having a systematic approach to expatriation and repatriation. Second, we discuss what expatriate effectiveness means. Third, we use the SDS framework to summarize relevant information that international human resources managers should consider when making expatriate assignments and that prospective expatriates should consider prior to accepting an assignment. Finally, we contribute our own insights about how expatriate assignments can be one pathway to achieving global perspectives.

Brief references are noted at the end of each section, and full references are given in the "References and Suggested Readings" section at the end of the report. On pages 30 and 31, our recommendations are summarized in tabular form.

This report will be of use to
- Line managers responsible for the staffing decisions to implement the global business strategy of their organizations.
- Human resources professionals responsible for the policies and practices that help them create a talent pool of managers for international work.
- Individuals who are offered an expatriate assignment and wish to increase the probability of their own success.

Although the expatriates and repatriates who participated in our research studies are originally from the Americas, Western Europe, and the Middle East, our findings converge with anecdotal evidence and other current research on expatriates who are from other parts of the world. Therefore, it is our view that the recommendations offered in this report can be useful to expatriates around the world—regardless of where they originate or where they are assigned.

Suggested Readings

Adler, N. J., & Bartholomew, S. (1992); Barlett, C., & Ghoshal, S. (1989); Ohmae, K. (1990); Weeks, D. A. (1992).

Full citations for these readings can be found in "References and Suggested Readings" on page 35.

THE COSTS OF FAILURE

What do expatriates contribute to the organization and why is it so serious when their job performance is sub-optimal? From a line and human resources perspective, expatriates play a critical role, both managing the business and continually learning to become more effective as managers. From the line perspective, expatriates deliver business results. They carry the company culture—policies, practices, and technologies—to new locations around the world. They teach and they monitor. They serve as conduits between company headquarters and their host countries. From the human resources perspective, expatriates learn about doing business in other countries and so become increasingly ready for complex roles involving work across multiple countries and cultures.

We see expatriate assignments as an unforgiving training and development arena for senior leadership. Expatriates themselves uniformly feel that what these assignments teach them is unique, valuable, and hard to learn in other ways. On these assignments they are relentlessly challenged to adopt multiple technical, functional, managerial, business, and cultural perspectives when dealing with any situation. So, step-by-step, expatriate assignments, when part of a systematic expatriation-repatriation system, can help individual managers build up a global scope of expertise. Particularly from the point of view of securing competitive advantage for the organization, expatriate assignments—when completed successfully—increase the size of the talent pool from which future senior managers can be selected.

Given the potential importance of expatriates to their organizations and the benefits of their experiences for their future leadership roles, it is dismaying that their failure rate—particularly for those from U.S. companies—is high. There is a litany of reasons for such failure—we believe failure occurs when the efforts to select, develop, and support expatriates are not grounded in best practice.

To illustrate some issues, the most effective employees are often reluctant to accept assignments. Of those who do, *HR Magazine* (June 1997) reports that an average of forty-five percent terminate their assignments early. In addition, too many selection decisions are based solely on employees' technical or functional competence in the domestic role. To compound the difficulties, expatriates' families are often sent along with no preparation for adjusting to the new environment. Language and culture training is seldom offered. It appears in many cases that the "here is your ticket, you leave in three weeks" approach is pervasive.

Moreover, there is little or no thought given to returning repatriates into the mainstream of organizational life. *Training & Development* magazine (July 1997) noted that fifteen to forty percent of repatriates leave their employers within twelve to eighteen months of returning. Other surveys, by the Conference Board (Gates, 1996) and the *North American Survey of International Assignment Policies and Procedures* (1996), reported that among primarily U.S. and Canadian companies, less than thirty percent have repatriation strategies.

The costs of unsystematic practices are indeed high. A *CFO* magazine article (June 1998) noted that with tax equalization, housing allowances, and cost-of-living adjustments and other benefits, the typical U.S. expatriate compensation package is three to five times base salary at home. High early termination rates drive these costs higher. And the high attrition rate for repatriates further compounds costs.

Because of these problems, some companies are shying away from using expatriates—not for business-based strategic reasons but because the expatriate staffing solution is expensive and does not seem to work. "Keeping the expatriate whole" can be very costly, and seventy-two percent of respondents in a 1998 survey conducted by Runzheimer International of 103 international relocation administrators in U.S.-based companies reported experiencing pressures to control the expenses of these assignments.

However, we predict that organizations that are not able to successfully deploy expatriates to accomplish business objectives will not succeed in the global economy. So the importance of developing human resources systems to select expatriate managers and prepare them to become effective is critical. One of the first things that human resources staff should understand is what expatriate effectiveness means. This is discussed next.

References and Suggested Readings

Allerton, H. E., in *Training & Development* (1997, July); Carey, P. M., in *CFO, The Magazine for Senior Financial Executives* (1998, June); Fitzgerald-Turner, B., in *HR Magazine* (1997, June); Gates, S. (1996); *North American Survey of International Assignment Policies and Procedures* (1996); Runzheimer International (1998); Tung, R. L. (1988); Wederspahn, G. M. (1992).

Full citations for these readings can be found in "References and Suggested Readings" on page 35.

What Does Expatriate Effectiveness Mean?

One frequent question about the series of studies that contributed to the SDS framework has been, "What do you mean by *expatriate effectiveness*?" The complexity of this term became more apparent to us over the course of the project. We found that international human resources managers are imprecise in their definitions of effectiveness, and opinions about a manager's effectiveness are often different. Effectiveness, it seems, is in the eyes of the beholder.

The research literature and our own research led us to conclude that effectiveness includes at least two components: adjustment and job performance. However, perceptions of effectiveness depend upon point of view: of the home or host country boss; of the organization itself and institutions and individuals external to the organization (such as governmental entities, competitors, vendors, and customers); and of peers, subordinates, and the expatriate himself or herself.

To illustrate these points of view, we constructed a schematic (see Figure 1) that labels the different expectations that must be taken into account. These expectations are based on location (home or host country), constituency (internal or external to the organization), and level (boss, peer, or subordinate).

Acknowledging that *expatriate effectiveness* cannot as yet be precisely defined, we recommend the following criteria, drawn from our own experience and from the literature (Ones & Viswesvaran, 1997) for assessing the quality of an expatriation-repatriation system.

- Is the assignment accepted by the person who is considered best for the job?
- Is the assignment completed?
- Do the expatriate and his or her family adjust well to the new location?
- Does the expatriate perform the job and accomplish the business objective?
- Is the repatriate able to use what he or she learns on the assignment to the benefit of the organization and his or her career?

Figure 1. Expectations for Effectiveness

	Location	
	Home Country	**Host Country**
Constituency		
Internal	• Achieves business goals. • Maintains good relation- ships with headquarters.	

External		• Adapts to local business
		  customs.
		• Develops good business/
		  political relationships.

Level		

Boss	• Accomplishes what is
	  expected.
		• Accomplishes what is
		  expected.

Peers		• Is committed, not just
		  punching career ticket.
		• Maintains good relation-
		  ships.

Subordinates		• Supports subordinates'
		  work goals.
		• Maintains good relation-
		  ships.

References and Suggested Readings

Gregersen, H., Morrison, A., & Black, S. (1990); Hawes, F., & Kealy, D. (1981); Kealy, D. J. (1990); Leslie, J. B., & Van Velsor, E. (1997); Ones, D. S., & Viswesvaran, C. (1997); Tung, R. L. (1997).

Full citations for these readings can be found in "References and Suggested Readings" on page 35.

How to Create and Maintain a
Talent Pool of Effective Expatriates

The Selection-Development-Support framework (see Figure 2) introduces the short-term and long-term factors that must be considered for properly managing an expatriation-repatriation system. "Short-term" factors can be addressed by HR managers within months or weeks of the start of the expatriate assignment. "Long-term" factors will need organizational interventions that may take a year or more of sustained observation and planning to design, and can only be implemented over time.

The framework was derived from many hours of conversations with expatriates and repatriates (some of their important comments are quoted in the appropriate sections below), from an analysis of tests and surveys they completed, and from the work of other scholars and practitioners knowledgeable about expatriate effectiveness. We wish to highlight that expatriate effectiveness is the result of a balanced consideration of each of the ten factors displayed in Figure 2. No single factor can predict effectiveness. Rather, these various factors must be brought into alignment.

The SDS framework is also the basis of major recommendations regarding how organizations can develop a talent pool to staff their international positions. For quick reference, see the summary on pages 30-31.

What follows is a detailed explanation of each of the elements of the framework, including quotes by the research participants.

Figure 2. Selection-Development-Support (SDS) Framework

	Short Term	**Long Term**
SELECTION	• Personality • Early-life experiences	• Family readiness
DEVELOPMENT	• Language training • Cultural training	• On-the-job development
SUPPORT	• Outbound transition • Family adjustment	• Equitable compensation • Repatriation

---

SELECTION

Short-term Considerations:
Personality and Early-life Experiences

The contributions of personality and early-life experiences to expatriate effectiveness have not been documented in a dramatic way by the research literature; this is in contrast, for example, to the extensive evidence available about the importance of family readiness. Nonetheless, our own and others' research has yielded findings that justify further investigation of both personality and early-life experiences as major factors contributing to expatriate effectiveness.

Personality

I can't really explain it. I grew up in this little tiny town in Alabama where my family had lived since the beginning of time. It's as if I was born wanting to travel and see new places.

When I was growing up, my best friend's uncle would come to visit them every year, all the way from France. My friend used to wonder at my wanting to sit and talk with him, because neither she nor her brother ever cared to do that.

We don't want to overstate the power of personality for predicting effectiveness in the expatriate assignment, but there is evidence linking personality to managerial effectiveness that is worth considering.

By *personality,* we mean an individual's typical way of feeling, thinking, and acting. To measure personality in our series of studies with expatriates, we used the NEO PI-R, an instrument developed to be as free of culture bias as possible. The NEO PI-R, as described by Costa and McRae (1992), configures personality in terms of five major factors, also known as the Big Five, each of which includes six facets. The statistically valid and reliable factors identified by this instrument are
- Emotional Stability—a person's response to stress, anxiety, worry, and anger;
- Extraversion—a person's sociability and ambition;
- Openness to Experience—a person's desire to engage in new activities, experiences, and ways of thinking;

- Agreeableness—a person's caring and concern for others; and
- Conscientiousness—a person's will or drive to achieve and accomplish goals and objectives.

A number of studies have linked the Big Five personality factors to managerial effectiveness. Research on domestic managers in the U.S., Canada, and Europe demonstrates that Conscientiousness, Extraversion, and sometimes Agreeableness in addition to Emotional Stability are correlated with managerial success. Research on expatriate managers (including our research) confirms that Conscientiousness and Agreeableness correlate with expatriate effectiveness.

How should information on personality be used as a short-term selection consideration? Feedback on personality style can help prospective expatriates assess their suitability for international work and develop coping strategies to overcome their tendencies to behave counterproductively.

For example, a potential expatriate manager who learns that he has a lower-than-average score on Vulnerability (a facet of Emotional Stability) will need to learn some stress-reduction techniques. One who discovers that she has a higher-than-average score on Assertiveness (a facet of Extraversion) may need to curb her tendencies to be dominant and forceful.

We believe that personality is not destiny but predisposition. If individuals understand their predispositions and are motivated to override their hard wiring, they can learn the behaviors necessary to function effectively in other countries.

Early-life Experiences

A second factor to consider when making selection decisions is the early-life experiences of the prospective expatriate. Given our exploratory findings, it seems highly likely that early-life experiences—including those of childhood and adolescence—do influence expatriate managers' ability to adjust and perform effectively.

These original, provocative but preliminary findings were developed from interviewee responses to the question, "Are there experiences in your early life or outside work that you believe helped you to be effective as an expatriate?" Thematic analysis of data from the eighty-nine interviewees across all three studies showed that there are three types of events or situations that are most frequently cited. Each seems to lead to a particular insight, or lesson, as described next (see Figure 3). Lessons of differences among people were cited most often and formed the only category of experience that was found to be statistically correlated to the host country boss ratings of

Figure 3. Early-life Experiences:
Lessons Learned from Most Frequently Cited Events

**EARLY-LIFE EXPERIENCES:
LESSONS OF DIFFERENCE**

- Early travel within or outside country
- Pilgrims/tourists visiting home town
- Immigrant parent
- Mutual home visits between people from different backgrounds
- Growing up near a border town
- Early life in cosmopolitan community
- Schooling in another country
- Learning a second language

**EARLY-LIFE EXPERIENCES:
LESSONS OF SELF-RELIANCE**

- Moving from one city to another
- Summer jobs
- Early family responsibilities
- Boarding school experience
- Positions of responsibility in school
- Parental expectations

**PERSONAL-LIFE EXPERIENCES:
LESSONS OF RELATIONSHIP LEARNING**

- Watching respected others ask for help when needed
- Watching a boss or parent ignore his or her own title/authority when talking to people
- Watching a boss listen to other people
- Being instructed to think for oneself and be assertive
- Knowing how to build and mend relationships and earn trust

overall job performance (see Appendix A). The number of events cited for each of the other two categories of experience was insufficient to make statistical analyses possible.

Lessons of difference.

When we were growing up, we read and traveled and mixed with different people. This must be considered because it made me ready to accept new situations and adjust myself.

Many different stories were told of contact with people from different cultures that occurred in a variety of ways. And these were not necessarily stories of fanciful trips to foreign lands. An American's recollection about the time his family began living in the urban Northeast after moving from the rural South created just as dramatic a memory as an Arab's recollection of the first time he ever saw a white person walking down the street in his small, remote rural community. Other stories described travel to unfamiliar locations and exposure to foreigners and immigrants in one's own community.

What our interviewees learned from these experiences was that *there were ways of behaving, talking, thinking, and feeling that were different from the ones with which they were familiar.* Perhaps this lesson leads an individual to later comfort with novelty and tolerance of difference, both of which are useful for expatriate work.

Lessons of self-reliance.

I grew up very independent. My parents depended on me for getting things done. I learned to make money and help my family. I always had confidence that I could get along with people.

Stories were also told of situations in which a child or adolescent assumed a position of real responsibility, for example by taking on a summer job, working to support the family, or living in boarding school for several years. In many cases parents encouraged or explicitly demanded such self-reliance.

We hypothesize that what was learned from these experiences was *an awareness that one must draw on one's own internal resources and develop the skills needed to deal with particular situations.* Perhaps this develops the autonomy and self-confidence needed later by the expatriate when located at a distance from the support of the home office.

Lessons of relationship learning.

My father taught me that everybody deserves respect, wants to be useful, and needs to be encouraged.

Lessons about relating to others and learning from them came from watching family members and mentors. There seem to be cultural differences, however—in our studies, the Middle Eastern managers reported learning from the behaviors of family members starting early in life; in contrast, U.S. managers reported learning from the behaviors of mentors and bosses. Across studies the behavior demonstrated by those in positions of authority was that of ignoring their own status or hierarchical position when relating to other people. As noted by one interviewee, "People who like their titles and like to be in control are not going to make it." Once learned, through observation of the behaviors of people in positions of authority, this respect for others then led to much additional learning.

We hypothesize that what is learned by watching the behavior of role models is *an attitude of respect toward others and oneself, and the awareness that there is much that can be learned from others*. Perhaps this develops a valuing of relationships per se and of the ability to learn from others— qualities that make expatriates comfortable with depending on others to learn what they need to know to be successful.

We recommend that potential expatriates be invited to talk about why they are seeking an expatriate assignment and also about the kinds of experiences they have had in their lives that they believe will help them to be successful in cross-cultural settings. Informal conversations can help to reveal —both to the human resources manager and to the prospective expatriate— whether or not there is likely to be a comfort with people different from oneself, a generally self-confident approach to new situations, and a regard for others and what can be learned from them. Provisionally, we think these data can be interpreted to indicate whether prospective expatriates have the ability to admit when they don't know what to do and to ask others for information, opinions, and guidance.

Long-term Consideration: Family Readiness

Many studies (including ours) have identified family support as a critical factor in determining whether an employee will accept an assignment,

adjust well to the assignment, and complete the assignment (Black, Gregerson, & Mendenhall, 1992; Haslberger & Stroh, 1992; Stroh, Dennis, & Cramer, 1994).

> *I can't tell you how important the adjustment issues of the wife are. The man gets very excited. He is moving to a demanding and compelling position where his capabilities are going to be recognized. He will have instant community. Meanwhile, the woman is leaving behind everything that has value for her and she will have less access to her husband's time at a point where she needs it more. She leaves her environment; he takes his with him.*

> *Catch people when it is possible for them to go. I couldn't go now because the kids are too involved in school. Cliques and friendships are so much a part of the high school experience, and my children are in high school right now.*

Companies must recognize that lack of family readiness inevitably limits the size of their pool of potential expatriates. Of course, addressing family readiness issues requires deliberate long-term career planning and development by the individual and the organization.

Using the information gathered in our study, we recommend that five screens be used to assess family readiness: lifestage of the family, role of the extended family in the home culture, previous life experiences and temperament of the spouse, compatibility of the spouse's role in home and host cultures, and adequacy of schooling and child-care arrangements in the host culture.

Lifestage of the Family

There are times in the life of a family when it is possible for family members to accept an expatriate assignment and times when they feel that they must say no. These times are highly family specific. Some individuals are more willing to accept an assignment when their children are small than when they are in grammar school or high school. Some see the benefits of living in another country to their adolescent children's lives. Some families have elderly or sick family members living with them and are unable or unwilling to leave them.

Helping families consider if and when they might be willing to consider an expatriate relocation is part of the human resources role. To help potential expatriates gain a realistic preview, international human resources staff in

some organizations dine with the family in the home to talk through the pros and cons of accepting an expatriate assignment in a particular location. Meeting repatriates and their families is also useful to the potential expatriate and his or her family.

As much as an organization may not want a potential expatriate to refuse an assignment, the consequences of acceptance under pressure are far worse. Decisions made by family members out of fear or without consideration of important information and issues can lead to distressed family life, including marital discord.

> *This kind of experience is a real partnership and you shouldn't take it if the marriage isn't strong. It will make it better or blow it apart.*

Role of the Extended Family

Individuals from non-U.S. countries may have a strong cultural preference for extended family life, and an expatriate's spouse can experience the assignment as isolating and lonely. The situation will be exacerbated as the expatriate becomes consumed by the task of mastering many different kinds of challenges, leaving the spouse to fend for himself or herself.

The role of the extended family is particularly important at some stages of life. If a family has very young children or elderly parents, the loss of family ties will be acutely felt. These emotion-laden conflicts between the demands of work and family life will predictably interfere with the expatriate's performance.

Previous Life Experiences and Temperament of Spouse

The generalizations that follow are based on what interviewees told us about their own spouse's ease or difficulty of adjustment. Spouses who adjust easily are described as educated, open, curious, gregarious, observant about other people and cultures, and flexible. They already know or are interested in learning a second language. Spouses who adjust well have had previous travel experiences. Eventually, they develop the autonomy and self-reliance needed to live in another country. Spouses who are not likely to adjust well are those who are so attached to their family and community that separation is a severe hardship.

Compatibility of the Spousal Roles in Home and Host Culture

Will the spouse's satisfaction with expatriate life be high, average, or low? For example, many modern women wish to pursue their own careers. Of

course, this is also true in those few cases where the so-called trailing spouse is a man. The host country may not offer a spouse many, or any, choices. Instead, the trailing spouse, especially if female, may end up with obligations related to the expatriate's career.

> *The social responsibilities for the wives are very demanding here. My wife got into the community very quickly and established friendships in both the expatriate and national social circles. She has helped me immensely in furthering the business interests for which I was sent. Did we recognize the importance of her fit with my job before coming here? I don't think so.*

Educational support or job placement for the trailing spouse and official company recognition for the spouse's role as a partner in the assignment—especially when extensive entertainment is expected—are two strategies for working with trailing spouses who have independent career aspirations.

The reverse situation also occurs. Women or men may wish to maintain a lifestyle emphasizing family and community life rather than to pursue a career. If the family relocates to a neighborhood populated by working couples, and if amenities enjoyed in the past—such as maids, gardeners, or other household help—are not available, this too poses difficulties that interfere with spousal adjustment.

Another indicator of how well a spouse will adjust is his or especially her willingness to cope with increased or restricted mobility. In some cases spouses may need to learn to drive; in other cases (especially assignments in countries where it is not customary for women to drive) they may need to use public transport or chauffeurs. Transportation facilities available in the host country may be quite different from what spouses were used to back home. Because mobility has an impact on how the trailing spouse will spend his or her time, differences between home and host situations need to be anticipated and addressed.

Adequacy of Schooling and Child-care Arrangements

In the adjustment of children and young adults there are both opportunities and problems, and these have to be handled on a case-by-case basis.

When children attend international or public schools, some of the benefits are that they learn English and/or the native language, meet young people from many parts of the world, make new friends, and learn to participate in many different school activities.

However, there are costs too. For instance, schools may not offer the courses or subjects taught in the child's own country, and upon return the child may have fallen behind his or her peers. If supplementary tutoring is necessary, it will take extra time and effort. Language barriers can lead to young people being misclassified and placed in lower grades or special education classes. Finally, in some parts of the world there are concerns about the quality of education offered and the safety of the institution and surrounding environment.

To summarize, early termination of the assignment or poor performance due to family adjustment issues is a costly consequence for the individual and the organization. Human resources managers must take time to converse informally with prospective expatriates and provide information as needed. Using the five screens described above to candidly explore issues will help determine whether the assignment is likely to work out. Even though spousal adjustment and schooling issues are outside the control of the company, a mutual investigation of potential problems can help families manage their expectations and face the challenges of life in a foreign country more realistically.

Additional recommendations concerning the support families will need in the host country are discussed below, in the section titled "Family Adjustment" (page 26).

References and Suggested Readings

Arthur, W., & Bennett, W. (1995); Barrick, M. R., & Mount, M. K. (1991); Bennett, J. M. (1993); Black, J. S., Gregerson, H. B., & Mendenhall, M. E. (1992); Church, T. A., & Lonner, W. J. (1998); Costa, P. T., Jr., & McCrae, R. R. (1992); Cui, G., & Awa, N. (1992); Deller, J. (1996); Haslberger, A., & Stroh, L. K. (1992); Markus, H. R., & Kitayama, S. (1998); McCrae, R. R., & Costa, P. T., Jr. (1997); Salgado, J. F. (1997); Stroh, L. K., Dennis, L. E., & Cramer, T. C. (1994, April).

Full citations for these works can be found in "References and Suggested Readings" on page 35.

DEVELOPMENT

Short-term Considerations: Language and Cultural Training

Earlier research by Black, Gregersen, and Mendenhall (1992) and our interviews with expatriates continue to confirm that both language and cultural training are critically important for both expatriates and their families. By *training,* we mean courses and programs that specifically teach the language, customs, and etiquette of another country.

Language Training

When an expatriate is not effective, it is because he or she is too lazy to learn the language.

What contributed to my success is learning the language. It is not the language per se that is important—it is the attitude represented by your learning the language—the mental attitude that you are trying to communicate with another person in their own language.

Locals hate it when you can't speak the language after one year.

I never tried to conduct business in Japanese, but trying to learn the language taught me a lot about the culture.

We send people but they don't become better managers because they don't learn the language.

In a study by Tung (1997) of 3,000 executives from twelve countries, only respondents from four English-speaking countries—Australia, Canada, the U.S., and the U.K.—deemed language skills unimportant. Data from respondents from other countries indicated it is simply not acceptable anymore for managers to be able to speak only English.

Although English has become the language of commerce and is the most commonly spoken second language, the language that people learn in their childhood and youth defines the ways in which they see the world. So to see the world through the eyes of people from a different culture, expatriates must try to learn the language of the country to which they are assigned. Even if an individual does not become proficient in the language, the attempt to learn another language represents a basic courtesy and does help provide a new perspective on the culture.

Cultural Training

> *The money that was spent on cultural training for me and my wife was money that was very well spent. I learned about the history, holidays, customs, politics, food, family structure, and values.*

> *We put managers into positions without getting them to the point where they understand the culture and what part of the culture will affect the business.*

> *The point I want to make is that living in another culture is really difficult. You are forced to accept things. I am not complaining. But you want to know ahead of time what are the difficulties.*

Training is required for practically every complex enterprise. Cross-cultural management is also a highly complex undertaking. Yet multinational companies continue to mistakenly assume that managers are bright people who will figure out what to do as they go along and that specialized training is not necessary.

First, even experienced internationalists agree that some form of culture shock is unavoidable. Culture shock is the stress experienced when a person feels a loss of control and mastery in a situation. Losing all the cues that help us orient ourselves to social and other situations—that tell us what to say when we meet people, how to interpret whether statements are serious or not, whether or not to express our preferences, how to gesture, and how to carry out many other simple acts of daily life—leads to anxiety. Nearly everyone experiences this type of disorientation, which is both physically and emotionally uncomfortable.

Though culture shock cannot be entirely avoided, its effects can be diminished. One way is to learn about the cultural adjustment process, which can take from three to nine months on an initial assignment.

Second, besides culture shock, other kinds of cultural adjustment must also be handled. Since the early years of the Peace Corps, many training models have been devised. They offer facts and information, sensitivity training, or immersion. A comprehensive list of various approaches and materials includes area briefings, cultural briefings, books and films, classroom language training, stress reduction techniques, critical incidents and cases, role plays, cultural-assimilator training, interactive language training, simulations, sensitivity training, and field trips.

However, despite clear evidence from empirical evaluation studies that language and cross-cultural training programs help adjustment and skill development and improve job performance, sixty-five percent of U.S. firms send their people overseas without any orientation (Mendenhall, Punnett, & Ricks, 1995, p. 440). When training is offered, it is usually not systematic. Spouses and children are seldom included. In our interviews we found that fewer than ten percent of the expatriates and their families had been provided with cultural training.

Language mastery and cultural understanding do not occur overnight or even in a few days, months, or in some cases, years. However, by learning basic expressions and conversational phrases, the assignee sets up a basis for interacting with others; language fluency can then improve slowly and steadily. Similarly, by learning factual information about the geography, history, demographics, politics, economics, sports, religion, and customs and rituals of the host country, the expatriate demonstrates an interest in and respect for the country and its people. This makes it easier to work productively with people in that culture.

Long-term Consideration: On-the-job Development

Preparing people to be effective as senior expatriate managers takes time. Developing effectiveness across a variety of activities is incremental. Development takes place over the course of a career, only eventually contributing to overall job performance at the senior levels.

> *I had a job where there were many problems. Any decision—personal or political—the buck stopped at my desk. I worked fourteen hours a day, seven days a week, but it gave me exposure and it gave me authority. I became prepared for the job I do here.*

> *If you start in the head office and get some experience before you go to different areas of the world, that is very important. You get to know people and procedures across the organization, in departments such as Planning, Finance, Human Resources, Sales and Marketing, and R&D. You establish networks and the understanding of organizational structures and politics that lets you get things done.*

By asking interviewees why they were chosen for an assignment, what they were learning on the assignment, and what they would look for if select-

ing somebody for an assignment, we were able to develop a picture of the complexity of expertise needed to become an effective expatriate manager. These data confirmed that worklife is a demanding teacher and that willing learners gradually build up tiers of expertise: technical, functional, and professional; managerial; business; and cross-cultural (see Figure 4).

Technical, functional, and professional expertise. Most expatriate managers have a high degree of technical, functional, or professional expertise that they take with them to the assignment. On the one hand, this is desirable, since it represents a skill set that contributes to the work at hand. It becomes a problem, however, since managerial tasks in cross-cultural settings additionally require individuals to be flexible in how they relate with others. Technical expertise is necessary but simply not sufficient for success on expatriate assignments. If managers are chosen based solely on their technical, professional, or functional history, it does not ensure that they will be competent managers.

Neither can these baseline skills be taken for granted in global organizations. Countries around the world are at various levels of economic progress, and a planned program of skill development is often necessary. To cover gaps in prior training, some companies enroll their employees in formal programs and subsidize tuition and other expenses. The individual's development plan is thus made to meet the strategic needs of the company.

Managerial expertise. Our research confirms earlier CCL research findings that broad-based experience, including cross-cultural assignments, improves the manager's ability to handle jobs and people.

> *You come up one notch at a time. You learn to manage people, institute performance measures, determine performance, revamp the overall facility that needs care and attention. I was put in the spotlight. I made it happen. This made all the difference on this expatriate experience.*

Figure 4. Tiers of Expertise

EXPATRIATE EFFECTIVENESS =
　　Technical/Functional/Professional Expertise
　　+ Managerial Expertise
　　+ Business Expertise
　　+ Cross-cultural Expertise

Of particular importance on an expatriate assignment is the ability to work with others. Managers with a history of working well with others were more likely to be able to establish trust and build the relationships necessary to be effective.

> *I have been in many offices. You learn that everywhere there are normal people, real people, with real-life problems, and so forth. There are certain issues, certain fears. Everybody has to give a little bit to try and understand one another.*

> *I observe, I reject, I adopt what is valuable for me, without losing my own personality and values, approaches, beliefs. When you are working with other people, all of this is a challenge all by itself.*

Business expertise. Expatriate managers need to understand their own business and how to conduct their business. This expertise is often acquired through staff assignments, master's level education, or profit-and-loss responsibilities. For example, it is not unusual to find that engineers who are becoming expatriate managers need coursework in finance and business strategy.

Previous assignments at the head office can be particularly relevant, teaching prospective expatriates "how corporate thinks and how the organization works." Such assignments also are an opportunity to get to know people —on assignments to other countries later, the value of these relationships becomes evident.

> *If somebody is going outside, and if he doesn't understand his own company, then he can't build his organization up.*

Without a stint at the head office (and sometimes despite such an assignment) the expatriate can feel isolated and out of touch with the organization's priorities.

> *When a corporation sends a person to a faraway place, there is always noise in the communication channel. It is frustrating for guys who are sent to faraway places. They feel that they are all alone and they feel that they are never understood. They feel they are second-guessed. This creates tremendous pressure. I took that pressure and learned to live with it. I learned about communication channel noise. You say something, and it doesn't come across like it would face-to-face. So, that's a problem you learn to understand and you live with it.*

A broad-based business background also prepares the expatriate manager for the decisions he or she will have to make in the field and on his own.

> *Out of country, you can't walk down the hall and ask. You do things on your own. It is great. You can screw up fifteen times a day, and solve 14.9 of those things before the folks at corporate are even getting out of bed.*

The expatriate who has a big picture view of the practices, policies, and strategic direction of the business is much more qualified to become a boundary-spanner. Spanning boundaries—hierarchical, functional, inter-organizational, and cultural—is usually the essence of the expatriate manager's role.

Cross-cultural expertise. There is growing recognition among multi-national companies that the ability to work with people from different cultures is critical. Not only expatriates but all managers who are part of a cross-cultural team must learn to work productively with people whose cultural background is very different from their own. Yet few know how to do so.

One tactic recommended by interviewees is that managers be exposed to other cultures early in their career so that they can learn important lessons and avoid mistakes later. Naturally, mistakes made when they are senior managers will be more costly to the company. For example, a major lesson—usually learned the hard way by many senior U.S. expatriates—is that what works in the U.S. doesn't necessarily work in other parts of the world.

> *Experience other countries as early in career as possible. This may not be an expatriate assignment. But it lets a person know that he doesn't know everything.*

> *You can't just go into a country and fix the problems. You have to be willing to put your own culture aside and prepare yourself to accept what you are going to be confronted with . . . you have to give things time and be willing to step out of it and let others go ahead and do what needs to be done.*

As these comments indicate, cultural expertise is gained slowly and by slowing down. Paying attention and listening gives expatriates the chance to see things from others' perspectives, without losing their own.

Going over there to make money is fine. But you should also be going over there to learn as much as you can. Learn and teach—this is how you can make the most of being an expatriate.

Although cross-cultural expertise is presented as the fourth tier in our developmental model, we suggest that the sooner foreign elements are introduced into the manager's life and work experiences, the greater the odds that the manager will be effective and successful in today's global world.

The fortunate few are those who have had cross-cultural experiences in tandem with the opportunity to master the demands of challenging managerial assignments. This is illustrated by the following story.

Harry had worked for a major oil company for seventeen years. He was initially trained as a mechanical engineer. During the first ten years of his career, he worked for two small companies in the U.S.—first an architectural engineering firm and then a consulting service. He learned about design and sales, information systems, and acquisitions. His technical and professional expertise evolved. On most of his jobs his primary clients were businesses related to the oil industry.

On his last assignment prior to joining the oil company, Harry became assistant to the president of his organization. In this role, he served as a specialist, advising his own company about business acquisitions. Subsequently, he was recruited to the oil company, a customer, to help with a reorganization.

Harry's contribution to the reorganization was so well received that he became a prime candidate for other challenging managerial assignments. Several of these involved reorganization. His managerial and business expertise increased considerably.

In his fourteenth year with the oil company, he was assigned to work as a liaison to an office in Southeast Asia. This role required considerable travel between the corporate office and the Southeast Asian field location. The company enrolled him in formal coursework to learn about the business culture and social customs of the country to which he would travel. He began to appreciate how business is conducted very differently in other parts of the world, took an interest in political events and economic trends in Asia, and started to develop his cross-cultural expertise. During this assignment he reported to a person who had a long and successful international career. This mentor encour-

aged Harry, providing him with lots of stories, support, feedback, and suggestions.

For the last two years, Harry has served as an expatriate general manager in a Pacific Rim country. To this role he brought technical expertise and broad knowledge of managerial and business issues. He brought his understanding of jobs across locations, functions, and companies. He brought his understanding of the perspective of head-quarters. And he brought along a family excited about the opportunity to live abroad for three years.

What are the implications of this story for developing a talent pool of expatriate managers? Start early and identify those employees who show an interest in an international career. Provide them with successively more challenging opportunities—business trips abroad, individual contributor roles on geographically dispersed cross-cultural teams, troubleshooting trips to international locations, a stint at headquarters in the international group, and so forth. Weave an international thread of experience into a variety of intense managerial and business challenges, building on a solid grounding in technical, functional, or professional expertise.

References and Suggested Readings

Althen, G. (1988); Black, J. S., Gregersen, H. B., & Mendenhall, M. E. (1992); Dalton, M. A. (1998); Gudykunst, W. B. (1994); Hickson, D. J. (1993); Lewis, R. D. (1996); McCall, M. W., Jr. (1998); McCall, M. W., Jr., Lombardo, M. M., & Morrison, A. M. (1988); McCauley, C. D., Ruderman, M. N., Ohlott, P. J., & Morrow, J. (1994); Mendenhall, M. E., Punnett, B. J., & Ricks, D. A. (1995); Morrison, T., Conaway, W. A., & Borden, G. A. (1994); Ronen, S., & Shenkar, O. (1985); Seibert, K. W., Hall, D. T., & Kram, K. (1995); Spreitzer, G. M., McCall, M. W., & Mahoney, J. D. (1997); Stewart, E. C., & Bennett, M. J. (1991); Tung, R. L. (1997).

Full citations for these works can be found in "References and Suggested Readings" on page 35.

SUPPORT

Short-term Considerations:
Outbound Transition and Family Adjustment

Proactively facilitating the manager's outbound transition and the family's adjustment can alleviate much of the confusing uncertainty associated with relocation and make the expatriate more productive more quickly. By *facilitating outbound transition* we mean orienting the manager to the role demands of his or her next position. By *facilitating family adjustment* we mean helping the family to establish new routines and settle in.

Outbound Transition

> *I was never told what I was expected to achieve. I think that they just thought that I was a good person who could learn to do the job quickly.*
>
> *The reasons for the assignment were not shared with me.*
>
> *The company should send managers out on an internship before they go out on assignment, so they know what the move will involve.*

Surprisingly, managers sent out on an expatriate assignment are often unclear about what they are expected to accomplish. They lack information about the business objectives that drive the assignment and how their role as an expatriate fits into the overall global strategy of their company. Time taken up front to prepare managers for their new roles could easily reduce how long it takes for them to become productive upon reaching the host country.

Lead time preceding the assignment, however, is variable.

> *I knew for a year that I was supposed to go. But the decision didn't come until the last minute.*
>
> *I didn't have enough time to prepare myself or my family adequately for the move.*

On the assignment expatriates are often isolated from others and find that they have to handle huge challenges by themselves. In such situations they may report that "everything about this job is bigger than I thought it would be" and that "nothing in my career prepared me for the magnitude of

these responsibilities." They also acknowledge that "there is no one to ask. You have to do everything yourself."

Meeting the business objectives of the assignment thus creates an immense opportunity for personal development that could prepare individuals for future leadership roles; but often, neither the business objectives nor personal development goals are made explicit. This unnecessarily complicates the outbound transition.

Family Adjustment

Moving one's family and base of operation from one country to another is similarly very difficult. Families usually need assistance to locate housing, purchase an automobile, determine whether a public or private school is most desirable, and accomplish much else. A decision about whether to maintain a primary residence in one's home country also has to be made. Lack of prior information makes the logistics of relocation even more difficult than they need to be.

We recommend that information about living conditions be made available ahead of time so expatriates and their families can adjust more quickly upon arrival. Detailed information on the following is usually welcome: desirable neighborhoods; housing costs; desirability of renting versus buying; crime rates; public, private, and specialized schools; medical facilities; transportation; availability and costs of amenities such as maids and drivers; jobs and social opportunities for trailing spouses; and anything else that can positively or adversely affect family adjustment.

Of course preassignment trips are ideal, especially when the spouse can be included, but they may not always be possible. We recommend that the "hygiene" factors just listed be investigated on the same trips used to explore the feasibility of the business venture.

Note that in this report we have addressed the family adjustment issues solely of married men. This is because study participants included only three women, of whom two were married. However, the adjustment process for women and for single rather than married expatriates of either sex was not strikingly different. (Please see the References and Suggested Readings at the end of this section, which include information about the issues of expatriate women.) What we did find was that married men who left their families behind due to poor quality of schools, high cost of living, fear of crime, or other factors in the host country regarded this as a hardship that could lead to their not completing the assignment.

Long-term Considerations:
Equitable Compensation and Repatriation

When compensation policies are inequitable and repatriation is poorly handled, fewer managers are interested in foreign assignments. Admittedly based on anecdotal evidence and popular literature, our sense is that in a majority of U.S.-based companies, international assignments are often treated superficially and there is no ownership and responsibility for the overall arena. Hence compensation policies and repatriation issues are not addressed in depth.

Equitable Compensation

> *At home I had a beautiful house, a car, a driver, a safe neighborhood. Here I have to take money out of my own pocket just to afford a crowded two-bedroom apartment and I have to send my children to private school.*

> *I don't expect to make money on this assignment, but I should be kept whole.*

There is so much disparity between cost-of-living and wage levels in different parts of the world that developing a fair system of remuneration requires a great deal of careful thinking. Added to this is the complexity of labor force distinctions. A foreign office can be staffed by a home country, host country, or third-country national. Should the remuneration be home or host country based?

There are also related issues. Which currency should be used to pay expatriates, or should some formula be applied to split the pay between home and host country currencies? Should there be hardship and danger premiums? What data should be used to determine cost-of-living allowances (COLAs)? When there is a high differential between home and host country for housing, transport, educational, and medical expenses, should additional costs be covered by the expatriate or the organization? Should special policies for home leave, vacations, and holidays be instituted for international assignees? Does the company have a tax-reimbursement policy, because the expatriate's salary may be subject to tax in both the home and host countries? Will expatriates contribute to government and other pension plans in both countries, or will there be a gap in payments that jeopardizes their seniority in a particular system? Will it be easy to reinstate medical coverage upon return? In case of

early termination of an assignment due to personal or family contingencies, who covers the relocation costs to the home country?

Compensation issues are the backdrop against which the drama of expatriation and repatriation is played out. Recognizing the complexity of these matters, we do not wish to make glib recommendations. International accounting firms compile compensation-related information for their databases and can report comparative country data to their clients; these data are a useful basis for developing compensation policies. In any event, company policies need to be explained thoroughly to the newly assigned employee. This is not always the case, and so misunderstanding and friction result.

Repatriation: The Difficulties of Coming Home

> *Repatriation was the worst experience ever. It is orders of magnitude harder than expatriation. When you go out, the adrenaline is pumping. When you come back, nothing.*

> *We need to attract people who want to go and treat them right when they get back. When people who return are not treated fairly, then others do not want to go.*

Why is coming home so problematic? The manager looks forward to returning home and expects to be able to adjust easily, but readjustment to life in one's home country is far more difficult than assumed. This is because the loss when leaving the host culture and the acuteness of the value conflicts experienced upon re-entry are surprising and discomfiting.

Also, the tremendous personal effort required to adjust and operate successfully in another culture and country is seldom recognized or rewarded upon return. Instead, expatriate assignments take managers out of the mainstream of corporate life, and their subsequent career moves are not well thought out, particularly in U.S.-based organizations. For example, companies are increasingly refusing to guarantee expatriates a position upon return (M. H. Peak in *Management Review*, January 1997, p. 9). Even with today's business globalization, a foreign assignment can have more negative than positive career consequences.

> *I think that I, my wife, and our family sacrificed a lot for the company. They all did it for my career with the company. I was hoping the company would recognize what I gave, and I am sure that there are many like me.*

Another common indignity of repatriation is that the manager's hard-won expertise and experience is ignored. The competitive business insights gained from an expatriate assignment are usually not debriefed. The organization loses valuable strategic information about globalization. "Nobody has ever asked me what I learned" is an unfortunate but all too typical comment.

I had built this knowledge base and network, and it was not used.

Nobody has ever asked me, "What did you learn, and how can the company take advantage of what you learned?"

All of our repatriate interviewees concurred that their organization did not take advantage of their experiences except indirectly. We found that in the organizations in which we conducted this research, our interview with the repatriate was more often than not the first opportunity he or she had had to talk about expatriate experiences and insights. Yet, in some cases these people had been home for two or three years. Perhaps this is one reason why expatriate managers leave their companies at twice the rate of domestic managers, particularly in U.S. organizations (Gates, 1996).

Average expatriate expenses can run one million dollars per year over a typical four-year posting, so poor repatriation practices only exacerbate the problem of a low return on investment due to the high opportunity costs of lost experience. This is regrettable, particularly for organizations wishing to develop global managers.

References and Suggested Readings

Adler, N. J. (1997); Black, J. S., Mendenhall, M. E., & Oddou, G. R. (1991); Gates, S. (1996); Harvey, M. (1997); Osland, J. A. (1995); Peak, M. H. (1997, January); Shames, G. W. (1997); Tung, R. L. (1998).

Full citations for these works can be found in "References and Suggested Readings" on page 35.

Recommendations for Developing a
Talent Pool of Expatriate Managers

	SELECTION	DEVELOPMENT	SUPPORT
Short Term	*Personality* • Use personality measures to help prospective expatriates assess their own strengths and limitations. • Assume that managers can override personality, because those with high motivation to succeed will adopt behaviors that are effective in cross-cultural business settings. • Sponsor research to investigate how personality helps or hinders expatriate effectiveness. *Early-life Experiences* • Converse with prospective expatriates to determine their comfort level with people who are different from them and with novel situations. • Encourage prospective expatriates to review their personal history of listening to and learning from others. • Sponsor research to investigate the influence of early-life experiences on expatriate effectiveness.	*Language Training* • Encourage and subsidize some type of language training for prospective expatriates and their families. *Cultural Training* • Familiarize first-time expatriates with culture shock and with techniques that can help them adjust emotionally to life away from their home culture. • Provide training and experiences to increase cross-cultural knowledge and sophistication prior to departure. • Include the prospective expatriate's family in as much of the training as possible.	*Outbound Transition* • Clarify the objectives of the assignment with the prospective expatriate (as far in advance as feasible) by discussing business and personal goals. *Family Adjustment* • Gather information about the practical details of relocation in advance and communicate to the family. • Study current policies and procedures that affect the logistics of relocation and determine how they can be improved. • Provide lead time for the expatriate and the family to prepare for the move.

Long Term

Family Readiness

- Visit the family and talk through the pros and cons of the assignment: At what lifestage is the family? Are its members part of a close-knit extended family? What are the previous life experiences and temperament of the spouse?

- Arrange meetings between the family and repatriate families in the same assignment location to discuss how home and host cultures are similar and different, particularly in terms of spousal roles, career opportunities for trailing spouses, transportation, and schooling and child-care arrangements.

On-the-job Development

- Identify and eliminate gaps in technical, functional, and professional expertise. Don't choose solely on technical expertise.

- Create development plans that combine challenging managerial assignments with opportunities to learn the business.

- Expand capacity to work with others, by using international relocation and project team assignments to meet explicitly stated personal development goals.

- Assign potential expatriates to rotational assignments in corporate headquarters so they acquire broad-based business knowledge.

- Integrate cross-cultural and international experiences into the managers' job assignments early in their careers.

Equitable Compensation

- Use international accounting firms to develop your organization's database of information about compensation policies and practices, taxation, and so forth in other countries.

Repatriation

- Debrief repatriates when they return to build country-specific knowledge bases about business, legal, political, and social practices, particularly as they affect your industry and organization.

- Carve out a new role for repatriates, including some responsibility for managing your organization's expatriation-repatriation system.

- Interview repatriates to study and address expatriation-repatriation issues in your organization.

- Introduce repatriates to prospective expatriates.

- Value the cumulative knowledge and wisdom of repatriates, and make repatriates a central resource for globalizing your company.

CAN GLOBAL PERSPECTIVES BE LEARNED?

The ten factors identified by our SDS framework work in concert with and inevitably affect expatriate effectiveness. But what is learned by the expatriates who have been effective in their assignments?

We think that learning to think and act globally and locally at the same time—that is, to adopt multiple perspectives when responding to any situation—is a key capacity that expatriate assignments make possible. Through direct and sometimes difficult experiences, expatriates learn how relationships are the bridge from their own point of view to many points of view. Having achieved the ability to adopt different perspectives—that is, to see situations through the eyes of others—effective expatriates are often humbled by their profound learning about themselves and their own culture.

> *The expatriate assignment is just a crash course in perspective-taking.*

> *You learn as much about yourself and your own culture as you do about other people and their culture.*

> *I learned depth, I learned breadth, I learned about my own country. It was painful to look back and see what our society was all about. When I looked back, I saw violence, I saw greed. I saw a lack of appreciation for the day-to-day details of our lives.*

This capacity for perspective-taking emerges because expatriate assignments provide ideal conditions for adult development. The profound sensory and communication differences experienced by expatriates in the foreign country compel their attention. Simultaneously, they find themselves in a situation demanding business success. Expatriates are thus stimulated to reconfigure what they already know.

Dixon (1994) states that one way in which adult development occurs is through the reorganization of what individuals already know into a new pattern. This reorganization of cognitive maps typically occurs when individuals encounter their own hidden assumptions about who they are and how the world works. Of course, expatriate assignments are just such a trigger for development. Foreign experiences upset some of their most dearly held tacit mental models—ideas about the world as they know it, how it should function, and their place in it. The assignment makes explicit the beliefs, assumptions, and values that guide their own behaviors and attitudes in the workplace.

But this development is not automatic—it seems to take place only for those expatriates who are willing to listen, admit to not having all the answers when situations are uncertain and complex, value the contributions of others, and work collaboratively to see how else the job can get done. Only such individuals seem to be able to establish the relationships that lead to trust.

One way to capitalize on expatriate assignments is to reframe the relationship between the business needs of the organization and the developmental needs of the individual. Simply because an expatriate is chosen to solve a business problem doesn't mean that the assignment cannot also be used as an intentional learning experience. Because the greatest adult learning occurs from on-the-job experiences—working with others, struggling with hardships, and enduring experiences powerful enough to compel attention and challenge personal assumptions—organizations must begin to prepare individuals to address the business problem *and* extract the greatest amount of learning and development for themselves.

The summary on pages 30-31 contains our recommendations on how to develop a talent pool of managers for international work. Our final recommendation is that international human resources managers help the individual and the organization to mine the greatest amount of learning possible from expatriate experiences. The expatriate experience is simply one of the most powerful tools available for preparing managers for complex roles at the senior levels of the organization; invaluable opportunities are opened up for developing global perspectives within individuals and organizations.

To conclude, we offer you an observation from the writings of H. S. Richardson (1933), whose vision founded the Center for Creative Leadership:

> *From a corporate standpoint, the danger is that managers gradually and insensibly lose the ability to recognize and adjust to new and changing business conditions.*

We submit that effective expatriates are uniquely qualified to help their organization recognize and adjust to new and changing business conditions.

References and Suggested Readings

Dixon, N. M. (1994); Mezirow, J. (1991); Richardson, H. S. (1933).

<center>**REFERENCES AND SUGGESTED READINGS**</center>

Adler, N. J. (1997). Global leadership: Women leaders. *Management International Review, 37,* 171-196.

Adler, N. J., & Bartholomew, S. (1992). Managing globally competent people. *Academy of Management Executive, 6*(3), 52-65.

Allerton, H. E. (1997, July). Expatriate gaps. *Training & Development, 51*(7), 7-8.

Althen, G. (1988). *American ways: A guide for foreigners in the United States.* Yarmouth, ME: Intercultural Press.

Arthur, W., & Bennett, W. (1995). The international assignee: The relative importance of factors perceived to contribute to success. *Personnel Psychology, 48,* 99-114.

Barlett, C., & Ghoshal, S. (1989). *Managing across borders: The transnational solution.* Boston, MA: Harvard Business School Press.

Barrick, M. R., & Mount, M. K. (1991). The Big Five personality dimensions and job performance. *Personnel Psychology, 44,* 1-26.

Bennett, J. M. (1993). Cultural marginality: Identity issues in intercultural training. In R. M. Paige (Ed.), *Education for the intercultural experience* (pp. 109-135). Yarmouth, ME: Intercultural Press.

Black, J. S., Gregersen, H. B., & Mendenhall, M. E. (1992). *Global assignments: Successfully expatriating and repatriating international managers.* San Francisco: Jossey-Bass.

Black, J. S., Mendenhall, M. E., & Oddou, G. R. (1991). Toward a comprehensive model of international adjustment: An integration of multiple theoretical perspectives. *Academy of Management Review, 16,* 291-317.

Carey, P. M. (1998, June). Coming home. *CFO, The Magazine for Senior Financial Executives, 14*(6), 77-80.

Church, T. A., & Lonner, W. J. (1998). The cross-cultural perspective in the study of personality: Rationale and current research. *Journal of Cross Cultural Psychology, 29*(1), 32-62.

Costa, P. T., Jr., & McCrae, R. R. (1985). *The NEO Personality Inventory manual.* Odessa, FL: Psychological Assessment Resources.

Costa, P. T., Jr., & McCrae, R. R. (1992). *Revised NEO Personality Inventory and NEO Five Factor Inventory: Professional manual.* Odessa, FL: Psychological Assessment Resources.

Cui, G., & Awa, N. (1992). Measuring intercultural effectiveness: An integrative approach. *International Journal of Intercultural Relations, 16*(3), 311-328.

Dalton, M. A. (1998). Developing leaders for global roles. In C. D. McCauley, R. S. Moxley, & E. Van Velsor (Eds.), *The Center for Creative Leadership handbook of leadership development.* San Francisco: Jossey-Bass.

Deller, J. (1996). *Possibilities and limitations of using personality scales in intercultural selection.* Paper presented at the meeting of the Society of Industrial and Organizational Psychology, San Diego, CA.

Dixon, N. M. (1994). *The organizational learning cycle: How we can learn collectively.* New York: McGraw-Hill.

Fitzgerald-Turner, B. (1997, June). Myths of expatriate life. *HR Magazine, 42*(6), 65-67.

Gates, S. (1996). *Managing expatriates return: A research report*. New York: The Conference Board, Inc.

Gregersen, H., Morrison, A., & Black, S. (1990). *Global explorers: The next generation of leaders*. New York: Routledge.

Gudykunst, W. B. (1994). *Bridging differences: Effective intergroup communication*. Thousand Oaks, CA: Sage.

Harvey, M. (1997). Dual-career expatriates: Expectations, adjustments and satisfaction with international relocation. *Journal of International Business Studies,* third quarter, pp. 627-658.

Haslberger, A., & Stroh, L. K. (1992). Be prepared: Development and selection of expatriates. *Human Resources Development Quarterly, 3,* 287-292.

Hawes, F., & Kealy, D. (1981). An empirical study of Canadian technical assistance. *International Journal of Intercultural Relations, 5,* 239-258.

Hickson, D. J. (Ed.). (1993). *Management in Western Europe: Society, culture and organization in twelve nations*. New York: Walter de Gruyter.

Kealy, D. J. (1990). *Cross-cultural effectiveness: A study of Canadian advisors overseas*. Quebec: Canadian International Development.

Leslie, J. B., & Van Velsor, E. (1997). *A cross-national comparison of effective leadership teamwork: Toward a global workforce*. Greensboro, NC: Center for Creative Leadership.

Lewis, R. D. (1996). *When cultures collide: Managing successfully across cultures*. London: Nicholas Brealey.

Lombardo, M. M., & McCauley, C. D. (1989). *Benchmarks: Developmental reference points for managers and executives*. Greensboro, NC: Center for Creative Leadership.

Markus, H. R., & Kitayama, S. (1998). The cultural psychology of personality. *Journal of Cross Cultural Psychology, 29*(1), 63-87.

McCall, M. W., Jr. (1998). *High flyers: Developing the next generation of leaders*. Boston, MA: Harvard Business School Press.

McCall, M. W., Jr., Lombardo, M. M., & Morrison, A. M. (1988). *The lessons of experience: How successful executives develop on the job*. Lexington, MA: Lexington Books.

McCall, M. W., Jr., Spreitzer, G. M., & Mahoney, J. (1997). *Prospector*. Greensboro, NC: Center for Creative Leadership.

McCauley, C. D., Ruderman, M. N., Ohlott, P. J., & Morrow, J. (1994). Assessing the developmental components of managerial jobs. *Journal of Applied Psychology, 79*(4), 544-560.

McCrae, R. R., & Costa, P. T., Jr. (1997). Personality trait structure as a human universal. *American Psychologist, 52*(2), 509-516.

Mendenhall, M. E., Punnett, B. J., & Ricks, D. A. (1995). *Global management*. Cambridge, MA: Blackwell Publishers.

Mezirow, J. (1991). *Transformative dimensions of adult learning*. San Francisco: Jossey-Bass.

Morrison, T., Conaway, W. A., & Borden, G. A. (1994). *Kiss, bow, or shake hands*. Holbrook, MA: Adams Media.

North American Survey of International Assignment Policies and Procedures. (1996). New York: Organization Resources Counselors.

Ohmae, K. (1990). *The borderless world: Power and strategy in the interlinked economy*. London: Collins.

Ones, D. S., & Viswesvaran, C. (1997). Personality determinants in the prediction of aspects of expatriate job success. *New Approaches to Employee Management (4*, pp. 63-92). JAI Press Inc.

Osland, J. A. (1995). *The adventure of working abroad: Hero tales from the global frontier*. San Francisco: Jossey-Bass.

Peak, M. H. (1997, January). Darned expensive to take for granted. *Management Review, 86*(1), 89.

Richardson, H. S. (1933). First special report to stockholders, The Vick Chemical Company, Greensboro, NC.

Ronen, S., & Shenkar, O. (1985). Clustering countries on attitudinal dimensions: A review and synthesis. *Academy of Management Review, 10*(3), 435-455.

Ruderman, M. N., McCauley, C. D., Ohlott, P. J., & McCall, M. W., Jr. (1993). *Developmental Challenge Profile: Learning from Job Experiences* (Questionnaire Booklet). Greensboro, NC: Center for Creative Leadership.

Runzheimer International. (1998). www.runzheimer.com/052698.htm

Salgado, J. F. (1997). The five factor model of personality and job performance in the European community. *Journal of Applied Psychology, 82*(1), 30-43.

Seibert, K. W., Hall, D. T., & Kram, K. (1995). Strengthening the weak link in strategic executive development: Integrating individual development and global business strategy. *Human Resources Management, 34,* 529-547.

Shames, G. W. (1997). *Transcultural odysseys: The evolving global consciousness*. Yarmouth, ME: Intercultural Press.

Spreitzer, G. M., McCall, M. W., & Mahoney, J. D. (1997). Early identification of international executive potential. *Journal of Applied Psychology, 82*(1), 6-29.

Stewart, E. C., & Bennett, M. J. (1991). *American cultural patterns: A cross-cultural perspective*. Yarmouth, ME: Intercultural Press.

Stroh, L. K., Dennis, L. E., & Cramer, T. C. (1994, April). Predictors of expatriate adjustment. *The International Journal of Organizational Analysis, 2*(2), 176-192.

Tung, R. (1988). *The new expatriate*. Cambridge, MA: Ballinger.

Tung, R. L. (1997). International and intranational diversity. In C. S. Granrose & S. Oskamp (Eds.), *Cross-cultural work groups* (pp. 163-185). Thousand Oaks, CA: Sage.

Tung, R. L. (1998). A contingency framework of selection and training of expatriates revisited. *Human Resource Management Review (8*, 1, pp. 23-37). JAI Press Inc.

Wederspahn, G. M. (1992). Costing failures in expatriate human resources management. *Human Resources Planning, 15,* 27-35.

Weeks, D. A. (1992). *Recruiting and selecting international managers*. New York: Conference Board.

APPENDIX A: DESCRIPTION OF RESEARCH

Overview

This report is based on an integration of the literature and the results of three research studies conducted by the Center for Creative Leadership between October 1994 and May 1997. Each study was guided by the same motive—to understand more about the antecedent conditions of expatriate effectiveness so as to inform selection and development practices in organizations. Our plan was to begin with the literature, then to conduct in-depth interviews with expatriates and repatriates to increase our understanding of the issues, and finally to develop and test our hypotheses using both qualitative and quantitative methods.

The series of studies offers several unique contributions. We were able to interview eighty-nine expatriate managers working for three major organizations who were deployed across more than twenty countries; and we compared and contrasted their responses to the same set of questions. We were able to talk with individuals at fairly senior levels in these organizations and gain insight into how the expatriate experience had affected them.

In the third study we were also able to gather effectiveness data from the home and host country bosses and colleagues of the expatriates. It is rare to have effectiveness data from multiple points of view, especially from the host country point of view.

There were also limitations to this series of studies. In spite of our perception that the themes that evolved from this group of expatriates were more similar than different, our samples had very few individuals of European or South American origin and virtually no expatriates originating from Asia or Africa. The sample sizes were small, and this limited the nature and scope of the statistical analysis. Also, the participants were from only three organizations, all involved in manufacturing or the exploitation of natural resources. Therefore, there may be differences in how some of the themes we have identified would play out in high-technology or service organizations.

We are nonetheless encouraged that we were able to corroborate the work of others and extend our own understanding of the complexity of living and working in another culture.

What follows is an account of the participants, methodology, findings, and outcomes from each of the three studies. Quantitative findings are detailed where appropriate. The results of the qualitative work (interviews and informal discussion)—although briefly summarized here—make up the basis

of the Selection-Development-Support framework and are found throughout the report itself. We have attempted to be thorough but not redundant to material found in the main body of the report.

Study 1

Participants

There were fourteen expatriates in study 1. They were selected by human resources practitioners and senior line managers as individuals who were effective in the expatriate role. According to one manager, the company's tacit definition for an effective expatriate was someone "able to conduct the core business in the chosen markets and able to make a profit, keep costs down, assess the investment without legal, political, or environmental trouble."

There were twelve men in the sample and two women. Average tenure with the company was twenty-three years. Seven were on their first expatriate assignment, and six had been on previous assignments. One had international responsibilities but had not relocated. Eleven were U.S. citizens, and three were native to other countries. Six were located in Latin America or West Africa, four were located in Europe, and four were located in the Middle East or Far East. Thirteen of the fourteen were married. Eleven of these participants spoke the language of the host country.

Methodology

Each participant was interviewed by one of four interviewers by phone for one hour. The interview format is included in Appendix B. Eleven of the fourteen completed the NEO PI-R (Costa & McCrae, 1985), a personality instrument that measures five major facets of personality, as described earlier. Eight of the fourteen completed Benchmarks® (Lombardo & McCauley, 1989), a multi-rater survey instrument that assesses managerial skills and perspectives conceptualized as lessons learned from experience. Eleven of the fourteen managers completed the Developmental Challenge Profile® (Ruderman, McCauley, Ohlott, & McCall, 1993), a survey that measures the amount and kind of challenge experienced by managers in their current assignments. Each individual was assured of the confidentiality of the individual data and the company was assured of anonymity and privacy.

Outcomes

In this study we conducted our first set of interviews, and the results were primarily qualitative. Conclusions from this study included an appreciation for the complexity of the expatriate manager's role, a vivid and concrete understanding of the power of the experience to teach managers about working across cultures far from the constraints and supports of the home office, and the failure of the organization to leverage this developmental opportunity to the benefit of the individual and the organization. We also were struck by the importance of the role of the spouse and family to the success of the assignment.

Organizing the data from this study led us to create the first iteration of the Selection-Development-Support model. The results of this study also informed the hypotheses for study 3 and helped guide our choice of instrumentation for study 3.

Study 2

Participants

The participants in study 2 included fourteen repatriates selected because of their level (senior within the organization), their reputation as having been effective on their expatriate assignments, and their availability and willingness to participate. There were thirteen men and one woman in the sample. Average tenure with the company was twenty-five years. Six were reporting on their first expatriate assignment, seven had had multiple assignments, and one had international responsibilities but had not relocated. Ten were citizens of the U.S., and four were native to other countries. All fourteen were married. They had been located in Asia, North America, South America, and Europe.

Methodology

Each participant was interviewed by one of two interviewers by phone or in person for an hour and a half to two hours. The interview format is included in Appendix B. Six of the fourteen managers completed the NEO PI-R, described previously. Each individual was assured of the confidentiality of the individual data, and the company was assured of anonymity.

Outcomes

This study was also primarily qualitative. It differed from the first study in point of view in that its participants were repatriates. It was from this group that we learned of the profound change in perspective that can occur on an expatriate assignment. Simply put, these individuals described the expatriate assignment as the most powerful developmental experience of their career. At the same time, they felt strongly that the organization did not appreciate or take advantage of what they had learned. It was this study that led us to understand that if repatriates are not treated well, then the pool of people willing to take the next set of expatriate assignments is likely to be limited to the less talented or those who believe that they have no choice but to accept an expatriate assignment.

Study 3

Participants

The participants in study 3 were thirty-eight individuals on expatriate assignment and twenty-three repatriates. The subject pool was all male. The average tenure with the company was seventeen years. All these participants were citizens of a Middle Eastern country. Twenty-three of these participants had had only one expatriate assignment, and thirty-seven had had more than one assignment. These participants worked or had worked in eleven different countries around the world. Forty-eight of the participants spoke the language of the host country.

Methodology

Each participant was interviewed in person or by phone by one of four interviewers for an hour to an hour and a half. The interview format is included in Appendix B. Forty-six of the participants completed an instrument measuring the five factors of personality previously described (NEO PI-R). Forty-eight of the participants completed Prospector™ (McCall, Spreitzer, & Mahoney, 1997), a multi-rater instrument that measures learning ability and managerial capabilities (described in detail on page 45). The bosses and peers of these managers were asked to respond anonymously to a questionnaire measuring overall job performance and relationship effectiveness (the ability to get along with a variety of constituency groups; see Table A1). Each individual was assured of the confidentiality of the individual data, and the company was assured that its identity would be protected.

Table A1. Criterion Measure for Study 3
(Rated on a 5-point scale)

Overall Job Performance

1. This person is effective in the expatriate role.
2. This person has done what was expected of him on this expatriate assignment.
3. This person is achieving the company's goals during his expatriate assignment.

Relationship Effectiveness

1. This person has very good relationships with subordinates in the host country.
2. This person has very good relationships with his peers in the host country.
3. This person has very good relationships with his boss in the host country.
4. This person has developed good business and political relationships in the host country.
5. This person has maintained very good relationships with headquarters during this assignment.

Outcomes

The interview data from this group helped us understand the incremental experiences that contribute to expatriate job performance. Because this group was Middle Eastern in origin, we had a dramatic picture of the influence of culture on family adjustment. We also had more extensive quantitative data from this group, and they are discussed below.

Personality

Table A2 illustrates the relationship between personality and one aspect of effectiveness—overall job performance as evaluated by the home and host country bosses. From the point of view of the home country boss, from the same country as the expatriate but not co-located with the expatriate

Table A2. NEO PI-R Scales: Zero Order Correlations

	M	SD	N	E	O	A	C	LD	HBOJP	HSBOH
N	69.07 (45)	14.33	1.0							
E	122.73	15.24	-.37	1.0						
O	114.64	16.36	-.10	.63	1.0					
A	121.67	12.29	-.17	.22	.25	1.0				
C	134.11	15.30	-.63	.51	.23	.44	1.0			
LD	1.96 (52)	1.36	.07 (38)	.18	.25	.21	.19	1.0		
HBOJP	16.23	2.12	.14 (21)	-.19	-.19	.48*	.49*	.30 (22)	**.89**	
HSBOH	15.66	2.62	.07 (27)	.15	-.28	-.0004	.11	.43* (27)	-.08 (11)	**.93**

Note. N = Emotional Stability; E = Extraversion; O = Openness to Experience; A = Agreeableness; C = Conscientiousness; LD = lessons of difference; HBOJP and HSBOH = criterion measures for home and host country bosses, respectively. *N* for analyses in parentheses for each grouping of variables. Sample size for each analysis in parentheses in cells. Cronbach's alphas for criterion measures in the diagonals.

* Alpha *p* < .05.

(HBOJP), there was a significant statistical relationship between the personality factors Agreeableness and Conscientiousness and overall job performance. In other words, home country bosses associated overall job performance with individuals who were friendly, concerned with the welfare of others, hardworking, conscientious, dutiful, and motivated to succeed. In contrast, there were no statistically significant correlations between the overall job performance ratings of the host country boss (HSBOH) and any of the personality factors. This is attributed to the fact that the host country bosses are located across many countries and so issues relating to culture, to the use of instruments and ratings scales, and to trust in the process of confidential data collection create too much error in the ratings. An ideal study would have multiple raters selected from all the countries surveyed so that measures could be standardized and therefore made comparable.

Additionally, there were no significant relationships between peer ratings of effectiveness and personality; again this finding is attributed to the reasons listed above, because the peers too were scattered across many cultures.

The ability and willingness to learn

In addition to asking the bosses and colleagues of the expatriates to fill out the effectiveness measure, we also asked the bosses to fill out Prospector, a questionnaire with eleven scales, four measuring the ability and willingness to learn and seven measuring various aspects of managerial effectiveness. (See Table A3 for scales.) Prospector was developed to depict the skills and attributes associated with success in international roles. We found only one significant relationship between host country peer ratings of effectiveness and the criterion variable relationship effectiveness and that was for the scale "Is committed to making a difference." This finding corroborates other studies in the literature in which host country locals are most satisfied with expatriate managers when they demonstrate true interest in the work, the country, and the local employees. In other words the manager is not there "just to have his ticket punched."

All eleven of the Prospector scales were significantly related to all of the home and host country boss measures of overall job performance and relationship effectiveness; but because these ratings reflect rater bias, they are hard to interpret and will not be reported out individually.

Table A3: Prospector™ Scales

Seeks opportunities to learn
Seeks and uses feedback
Learns from mistakes
Is open to criticism
Is committed to making a difference
Is insightful
Has the courage to take risks
Brings out the best in people
Acts with integrity
Has broad business knowledge
Adapts to cultural difference

Career variety and intensity, previous expatriate experience, college education out of country

We found no statistically significant relationships between the criterion variables and previous career history (coded for variety and intensity), previous expatriate experience, or college education outside or within the home country. Again, in an ideal study sample size would be large enough to test these variables in tandem with other variables.

Personal learning

Based on the interview results of studies 1 and 2, we hypothesized in study 3 that individuals who in early childhood and adolescence (but before college) had learned self-reliance, had acquired the habit of learning from others, or had been exposed to difference (for example, through meeting people from other cultures, traveling, or learning to speak another language) were more likely to be effective in expatriate roles than were individuals who had not had these experiences. To obtain these data we simply asked participants if there were experiences in their early life or outside their worklife that had prepared them to be effective as expatriates. We coded the stories they told us as stories of self-reliance, stories of relationship learning, or stories illustrating lessons of difference (LD). We found a statistically significant relationship between the number of stories of difference an individual told

and overall job performance as rated by the host country boss (HSBOH) (see Table A2). An insufficient number of individuals in this sample told stories of relationship learning or self-reliance to test our hypotheses quantitatively, and so we hold these hypotheses for future studies: (1) Expatriate effectiveness requires both the ability to stand alone and the willingness to learn from others; (2) Individuals who come to the assignment with a history of experiences teaching self-reliance and learning from others are more likely to be effective than are individuals who cannot work well at some distance from support and authority structures and who are unable to admit when they don't know what to do and unable to ask others for information, opinions, and guidance.

<center>A<small>PPENDIX</small> B: I<small>NTERVIEW</small> P<small>ROTOCOLS</small></center>

<center>**Interview Protocol: Study 1**</center>

The purpose of this interview is to help us understand what your overseas assignment is like, what helped you get ready for it, what you are learning from it. We want to use this information to help other managers be successful on such assignments and to help organizations capitalize on what their expatriates have learned.

Background Information

How long have you been a country manager? What is the scope of people and activities that you manage?

About your career: How long have you been with (*company name*)? How did you become a country manager? Is this your first international assignment? What was your assignment prior to this one?

Do you speak any language in addition to English?

Current Assignment

What did you know about this assignment before you accepted it? What were some of your reasons for accepting this assignment?

What are your responsibilities in your current job? What are the business challenges you are facing? What are some of the people challenges? How is it different to lead people who are culturally different from you rather than leading people who are culturally similar to you?

How would you describe (*company name*'s) global strategy? What role do you see yourself playing vis-à-vis (*company name*) corporate?

If first overseas assignment:

When you look back over your time in this assignment, can you recall when you first began to feel effective as a manager in this country? Was there an event or series of events that stands out in your mind as the beginning of a sense of satisfaction with yourself as a manager in this setting?

Prior to that, what was it like? What were some experiences that you had that did not go so well?

If not first overseas assignment:

How was your first assignment different from subsequent assignments? What have you learned about being successful in a foreign assignment?

What did it mean to you to be effective in the job when you first started working abroad? Have you changed your mind about what it takes to be effective?

Self-assessment

What are some of your key achievements in this assignment? To what do you attribute your success?

What do you see as your key strengths (either that you had already or that you have developed) that have led you to be successful?

Were there experiences or assignments you had prior to taking this job that helped you develop those strengths?

Company Role

What did the company do to help you get ready for the assignment? What was most helpful? What was not helpful? What else could the company have done?

In addition to helping you be effective in the assignment, what did the company do to help you adjust to the culture? How did it help your family?

The Expatriate Experience in General

Do you manage any expatriates? What do you think it takes for an expatriate to work effectively with people from a different culture?

How many country managers are expatriates as opposed to country managers who work in their own country? Do you know how (*company name*) decides whether to use expatriates rather than local managers?

What contact do you have with other country managers? Do you have occasions to work together on any projects or activities? What are the cross-cultural issues that have to be addressed when you work together?

Summary of Insights

If you were selecting senior managers who you thought would be effective in an international company like (*company name*), what would you look for?

What would you do to prepare future managers for this assignment? What are the most important things a person needs to know? What are the most important skills and capacities a person needs to have?

How might your organization capitalize on what you have learned abroad?

Repatriation

If assignment has been completed:

When did you return from this assignment? What was reentry like?

When you reflect on your assignment from the perspective of today, what did you learn that you have used in your work since? How might your organization have capitalized on what you learned abroad?

<div align="center">

Interview Protocol: Study 2 (Repatriates)

</div>

Background

1. Please tell me about your background.

    What is your background?
    What are the kinds of assignments you have had?
    What is your current assignment, its scope and responsibilities?
    Do you currently have international responsibilities?
    Could you sketch out for me where you fit in the organization?

International Assignments

2. I would like to talk more specifically about the assignments where you had international responsibility, especially expatriate assignments.

   • What were the responsibilities and challenges in this assignment (these assignments)?
   • How successful were you in meeting your objectives in this assignment (these assignments)?
   • How effective were you as a manager and leader in this assignment (these assignments)?

3. Are there events or situations in your background (personal or work related) that you believe contributed to your ability to work internationally?

4. What knowledge, skills, and attitudes did you take with you that contributed to your effectiveness as an expatiate/international manager? What are the most important things a manager needs to know; the most important skills and capacities?

5. What would you do to prepare future managers for such an assignment?

In Retrospect

6. What did you learn from your international assignment(s)?

7. Has your learning affected how you manage, the way you think about the business, your career direction? Anything else?

8. How has this learning benefited the company?

9. Are there ways the company could/should be building on your learning, both for your own continued growth and for the benefit of the company?

10. Do you think it is possible for an individual to manage and lead effectively across geographic and cultural boundaries if he or she has not had an expatriate assignment? Can you give me some examples to illustrate your answer?

Interview Protocol: Study 3

1. Please tell me about your current expatriate (most recent) assignment. Is (Was) this your first expatriate assignment? How long have you had (did you have) this position? What are (were) the responsibilities of this job? What are (were) you expected to accomplish? How much longer do you expect to have this assignment?

2. Why were you chosen for this (that) assignment?

3. Do you feel you are being (were) effective in this job? How long did it take before you started to feel effective?

4. We would like to understand a little about your history before you took this expatriate assignment:

    • Your career history is listed for us on your company résumé. Is it complete?
    • Which of these assignments were expatriate assignments?
    • Were any of these assignments at headquarters?
    • Were any of these assignments helpful to you in your expatriate assignment?
    • Were any of these assignments particularly challenging or difficult, requiring you to learn a great deal? Tell me about those. What did you learn?

5. Were there any experiences in your life outside of work or in early life that helped you be effective in your expatriate experience? Are there any other experiences that come to mind?

6. What are you learning (did you learn) on this expatriate assignment?

7. How do you think you will (How did you) use this learning after you return(ed) to a domestic assignment? How do you think (did) *(company name)* could use (use) what you are learning (learned) after you return(ed) to a domestic assignment?

8. What impact will (did) this assignment have on your career?

9. How has (was) this assignment been for your family?

10. Were they involved in your decision to take the assignment?

11.   What did *(company name)* do for you and your family to help you prepare for this assignment? What else could the company have done that would have been helpful? What languages do you speak?

12.   If you were selecting someone for an expatriate assignment, what would you look for?

13.   Is there anything else you would like to tell us?

Ordering Information

For more information, to order additional **CCL Press** publications, or to find out about bulk-order discounts, please contact us by phone at **336-545-2810** or visit our online bookstore at **www.ccl.org/publications**.

INTERNATIONAL SUCCESS
Selecting, Developing, and Supporting Expatriate Managers

When managers in multinational companies are not properly prepared for assignments in foreign countries, the costs are great—for the managers themselves, for their organizations, and for their home countries. But how can expatriates prepare for such assignments? The selection-development-support framework described in this report not only identifies the important factors to consider when working overseas but also specifies ways to develop a talent pool of effective expatriates. Such factors as personality, early-life experiences, role of the spouse, language and cultural training, and repatriation are discussed in detail and recommendations for expatriate success are provided.

The Authors

Meena S. Wilson is a Center associate with the Global Initiatives group at CCL and has responsibilities for exploring strategic alliances with international partners. She has coauthored *Managing Across Cultures: A Learning Framework* (CCL, 1996) and "Understanding the Demands of Leading in a Global Environment: A First Step" (*Issues & Observations*, CCL, 1997). A native of Jamshedpur, India, she holds a Ph.D. in adult education from the University of North Carolina at Chapel Hill.

Maxine A. Dalton is a research scientist and leader of the Global Leadership group at CCL. With primary research interests in adult development and in learning in domestic and international organizations, she has coauthored *How to Design an Effective System for Developing Managers and Executives* (CCL, 1996) and authored "Developing Leaders for Global Roles" (in *The Center for Creative Leadership Handbook of Leadership Development*, Jossey-Bass, 1998). She holds a Ph.D. in industrial/organizational psychology from the University of South Florida.

Center for
Creative Leadership
leadership. learning. life.