

THE PENNSYLVANIA STATE UNIVERSITY
SCHREYER HONORS COLLEGE

DEPARTMENTS OF SUPPLY CHAIN & INFORMATION SYSTEMS AND PSYCHOLOGY

MAXIMIZING EXPATRIATE PERFORMANCE
A Study Examining the Most Effective Methods to Send Employees Abroad

KENNETH HARRISON COLEMAN
Spring 2011

A thesis
submitted in partial fulfillment
of the requirements
for baccalaureate degrees
in Supply Chain & Information Systems and Psychology
with interdisciplinary honors in Supply Chain & Information Systems and
Psychology

Reviewed and approved* by the following:

Dr. Robert A. Novack
Associate Professor of Supply Chain & Information Systems
Thesis Supervisor

Dr. James L. Farr
Professor of Psychology
Thesis Supervisor

Dr. John C. Spsychalski
Professor Emeritus of Supply Chain Management
Honors Advisor

Dr. Richard A. Carlson
Professor of Psychology
Honors Advisor

* Signatures are on file in the Schreyer Honors College

ABSTRACT

This thesis strives to delve into the specifics of long-term expatriation by: 1) examining how to select the best employees for international assignments; 2) how to properly prepare them for their new assignment; and 3) how to properly support the employee while abroad and prepare them for reintegration into the home organization and culture. This thesis will review current psychological and business journal articles and periodicals, reference current company policies surrounding expatriation, as well as make suggestions for companies looking to provide international assignments for their employees. The interviews conducted combine information and personal accounts provided by HR professionals and expatriates from three different multi-billion dollar companies in a diverse range of industries.

Table of Contents

Abstract.....	i
Table of Contents.....	ii
Acknowledgements	iii
Chapter 1. INTRODUCTION TO EXPATRIATION	1
Chapter 2. REVIEWING SELECTION	6
Choosing the Right Person	6
Beyond Personality.....	9
Chapter 3. PRE-DEPARTURE TRAINING AND PREPARATION	12
Cultural Training	12
Managing Expectations	16
Chapter 4. SUPPORTING AND REPATRIATING EMPLOYEES	19
Keeping In Touch	20
Career Counseling	23
A Domestic and International Resource	25
Going Home	28
Chapter 5. DISCUSSION	31
Limitations.....	31
Trends.....	34
Examining Corporate Practices	36
Future Research	36
Appendix A	38
Works Cited.....	40

ACKNOWLEDGEMENTS

This thesis would not be possible without the continuous support from my parents; my thesis advisors, Dr. Farr and Dr. Novack; my friends; and Adam Firely. You are all amazing people, and I will never forget your patience, knowledge and support. Also, I would like to thank Explosions in the Sky and their “The Earth Is Not a Cold, Dead Place” album for providing motivation, concentration and direction when I needed it.

Chapter One

Introduction to Expatriation

A common assumption in the business world is that the “world is shrinking” due to increased technology, better communication, an increased knowledge of cultural norms and an interest in expanding business outside of one’s own country into emerging markets. To businesses, this means not only that products can be sent from one’s country elsewhere, but also that retailers, plants, warehouses, manufacturers and entire business functions can also be exported to become part of a larger, international network of the business. With the growing popularity and relative ease to expand internationally, many companies that consider expansion (or those companies that have already expanded but are reflecting on their decisions) face many problems involved in the process of globalization.

Economist Dilip K. Das defines globalism as a network of connections spanning multi-continental distances, drawing them close together economically, socially, culturally and informationally (Das, 2009). Although globalization is not a new concept by any means, it has grown to a level previously unfathomable prior to the 1980s. Since then, advancing technologies, cooperating governments and inexpensive transportation have allowed globalization to become so widespread that it is now rare for a successful company to not have operations in multiple countries (Das, 2010). In fact, according to a Global Trends Survey conducted by Brookfield Global Relocation Services in 2010, the percentage of revenue generated outside a company’s headquarters country has climbed from the historical average of 44 percent to 58 percent (Brookfield GRS, 2010).

This increasingly complex network places not only a strain on the transportation of the company’s physical product, but also on the workers. Differences in language, cultural norms,

local laws, time zones, management practices/structure and ethical beliefs are just some of the problems individual workers may face when a company goes global. To account for these cultural differences, many companies are now sending managerial employees abroad in an effort to create a more global workforce and to implement best practices across the world. This practice is called expatriation, where the workers who leave their home country to complete an international assignment are called expatriates.

The act of expatriation is one that has been growing exponentially due to the increasingly global nature of business, as seen by the Global Relocation Trends Survey conducted by GMAC Global Relocation Services. According to the survey, 67 percent of companies are experiencing an increase of their international assignee population, compared to only 31 percent in their 2004 survey (GMAC GRS, 2008). Additionally, 68 percent of these companies are anticipating further growth in 2009. This growth is linked with global business concerns, according to PricewaterhouseCoopers’ (PwC) 10th Annual Global CEO Survey, which states that “managing diverse cultures” was one of the top concerns in 2007 about the future (PricewaterhouseCoopers, 2007). As shown in Figure 1, in PwC’s most recent 2011 survey, 59 percent of the 1,201 CEOs surveyed expected “some” to a “significant” amount of change in terms of the deployment of international assignments.



Figure 1: International Deployment a Priority for CEOs (PricewaterhouseCoopers, 2011)

Additionally, the number of international assignments among multinationals increased 25 percent since 2000, and the PwC authors further speculate that there will be an additional 50 percent growth over the next decade (PricewaterhouseCoopers, 2011). Expatriation is becoming so important that many companies are starting to view international experience as a requirement for higher level management (Suutari & Burch, 2001). Based on these figures, there is obviously a need for expatriation and, subsequently, an even larger need to understand how to deploy international employees properly and effectively.

Within the past forty years, hundreds of articles have surfaced discussing the benefits, challenges, and best practices surrounding expatriation. Surprisingly, though, many companies are still searching for the best methods to send an employee abroad and to successfully reintegrate them into the host organization. Expatriation is an incredibly meaningful and value-adding practice that is appropriate for most companies to engage in, but it is also costly and can be devastating for the company and employee if not conducted correctly. Unfortunately, many companies are not engaging in the best practices and it is costing them talent and money. In addition to the \$1-2 million investment per long-term international assignee (O'Conner, 2002; Klaff, 2002), 40 percent of employees are leaving their assignment prematurely (Black & Mendenhall, 1990), and an estimated 38 percent of employees leave the company within a year of repatriation (Brookfield GRS, 2010). The loss of talent can be additionally costly, according to a study featured in the *Journal of International Business Studies*, which found that the early termination of a single expatriate can cost the firm as much as \$1 million (Shaffer, Harrison, & Gilley, 1999). These are staggering numbers, considering that a recent Global Assignment Policies and Practice (GAPP) study produced by KPMG, which surveyed over 500 multinational

organizations, found that 48 percent of the organizations surveyed had at least 50 employees currently assigned abroad (KPMG, 2010).

Companies can also experience indirect costs resulting from poor expatriation experiences, such as reductions in productivity, damaged relationships, discredited reputations and competitive position (Black, Gregersen, & Mendenhall, 1992). The high turnover and inferred lack of satisfaction associated with engaging in an international assignment hints at a fundamental problem within the process of expatriation. This discrepancy is highlighted in a 2001 *Cigna* study, which showed that 53 percent of companies felt they were good at preparing expatriates and 64 percent good at meeting their needs on assignments, where only 32 percent of expatriates felt the company did a good job (CIGNA International Expatriate Benefits, NFTC, and World at Work, 2001).

This thesis strives to delve into the specifics of long-term expatriation (defined as relocation for at least one year (Cendant Mobility, 2004)) by: 1) examining how to select the best employees for international assignments; 2) how to properly prepare them for their new assignment and 3) how to properly support the employee while abroad and prepare them for reintegration into the home organization and culture. This thesis will review current psychological and business journal articles and periodicals, reference current company policies surrounding expatriation, as well as make suggestions for companies looking to provide international assignments for their employees. This thesis also includes summaries of interviews conducted with three HR professionals (Karen O, Karen G, and Robert) and three expatriates (John, Kevin and Linda) from three different companies (IBM, Dell Inc. and VWR International LLC). It should be noted that John's expatriate assignment was with Digital Equipment Corporation, although he now works for IBM. John no longer works for Digital Equipment

Corporation, and all information related to expatriation with IBM was received from interviews with Karen O. The company and employee profiles are listed on Appendix A.

Chapter Two

Reviewing Selection

Undoubtedly, one of the most important aspects of a successful expatriate experience is selecting the right individual. Typically, expatriate assignments are assigned in one of four roles to achieve specific goals: a structure reproducer (create a structure that replicates a structure successful in another location), a troubleshooter (analyze and solve a specific problem), an operational element (perform as an acting element in an existing operational structure) and the chief executive officer (an overseer of the entire foreign operation) (Hays, 1974). Based on the personal descriptions of their expatriate experience, Linda and John would be classified as structure reproducers and Kevin would be classified as an operational element. Although differing in function of assignment and the amount of human/technical interaction, all roles face a difficult challenge of performing in an unfamiliar environment with new coworkers, while simultaneously undergoing a personal and professional adaptation to life in a completely different culture. To determine the most effective employee traits/skills when assigning international assignments, many different theories have been proposed and many companies take different approaches in practice.

Choosing the Right Person

One method of selecting employees, which has been proven successful, is by self-assessment, or self-selection, which helps employees make informed and realistic decisions about global assignments regarding availability, flexibility, languages spoken, preferred locations, knowledge, skills and abilities (Caligiuri & Phillips, 2003). Self-selection allows the employee to “critically evaluate themselves on...personality and individual characteristics, career issues and family issues (including issues of spouses and children),” which helps the

organization provide a realistic preview of their new role (Caligiuri, Tarique, & Jacobs, 2009). Although none of the three companies highlighted had used a formal self-selection program, all of the employees interviewed emphasized that they had been vocal about their desire to work abroad and encouraged employees to pursue skills that would help them succeed abroad (such as taking language courses and pursuing roles that work directly with employees in other countries). To help recognize personal values, preferences and work styles, IBM offers an online self-assessment which even helps pinpoint which countries are best cultural fits for the employee.

Whether using self-assessment or not, one of the most overlooked, but important, aspects of selecting expatriates is not only to examine employees' technical skills, but also to take into account their personality traits and leadership ability. Although this task may seem simple enough, the cultural differences experienced by the expatriate and the employees in the new culture can cause problems that could potentially disrupt the whole assignment and cause the employee to return early or even quit. According to an article in the *European Journal of Personality*, human resource (HR) professionals should look to recruit employees who possess high levels of openness, emotional stability, social initiative and flexibility to become expatriates (Van der Zee & Van Oudenhoven, 2000).

Van der Zee & Van Oudenhoven defines openness as an ability to place oneself in another person's position, or an acceptance of different cultural norms, values, customs, and combines the characteristics of open-mindedness and cultural empathy. Open-mindedness refers to an "open and unprejudiced attitude towards outgroup members and towards different cultural norms and values" (Van der Zee & Van Oudenhoven, 2000). This personality trait is critical when working abroad, especially in cultures that are vastly different from one's home culture. Possessing prejudices can have catastrophic effects on the employee's acculturation into the host

culture, and can create rifts between the employee and the host workplace. Cultural empathy is one of the most commonly used dimensions of cultural effectiveness, and for good reason. Cultural empathy is defined as “the capacity to clearly project an interest in others, as well as to obtain and to reflect a reasonably complete and accurate sense of another’s thoughts, feelings, and/or experiences” (Ruben, 1976). This personality trait helps expatriates relate to employees in their new role by creating and maintaining relationships, which has been shown to greatly improve the expatriate’s ability to learn culturally appropriate social skills and behaviors, which eases the transition into the new job and culture (Searle & Ward, 1990).

Emotional stability refers to the “tendency to remain calm in stressful situations versus a tendency to show strong emotional reactions under stressful circumstances” (Ali, Van der Zee, & Sanders, 2003). As an expatriate, stressful events can come in all forms, including (but not limited to) frustration, anxiety, divergent political systems, pressure to conform, social alienation, financial problems and interpersonal conflict (Ali, Van der Zee, & Sanders, 2003). To deal with these psychological stressors, emotional stability emphasizes the ability to remain calm and refrain from showing strong emotional reactions when stressed. According to an article featured in *Journal of Applied Psychology* in 2006, emotional stability is negatively related to withdrawal cognitions and positively related to work adjustment and cultural flexibility (Shaffer, Harrison, Gregersen, Black, & Ferzandi, 2006). These findings show that employees who have a solid grasp on understanding and controlling their emotions will adjust to their new work role easier, will have an easier time transitioning into a new culture and will be less likely to form concrete decisions about prematurely quitting their assignment.

Social initiative serves as a combination between extraversion and orientation to action. Orientation to action is characterized by taking initiative, striving for results, and problem-

solving skills. Extraversion, defined as “a tendency to stand out in a different culture,” coupled with an orientation to action helps employees become proactive in their transition into a new culture (Van der Zee, 2000). It is best for an employee to take social initiative when acculturating because this will most likely expand the employee’s network, and thus, their support system.

The fourth trait that Van der Zee found useful in an expatriate’s transition abroad is flexibility. Flexibility describes the ability to easily switch from one task, strategy or behavior to another, which is essential when expectations don’t match up with reality. Many expatriates will have certain expectations, behaviors or customs that could prove problematic in a new culture, so the employee has to be agile and learn to adapt. In addition to changing oneself, the employee must also be able to learn from mistakes and adjust behavior when required.

Beyond Personality

In addition to personality traits, employees must also be professionally capable of succeeding in a new, different culture. Many researchers have found a positive relationship between language skills and expatriate success, where the local language ability is a positive predictor of success while abroad (Caligiuri, Tarique, & Jacobs, 2009). In addition to having the ability to speak the host’s language, having prior international work experience is positively related to interaction adjustment and work adjustment, therefore making the transition more manageable. Usually, the best candidates for expatriation are those who have had previous exposure to the host’s culture, due to the fact that the experience “provides an accurate and realistic representation of the host countries’ norms, customs and values” (Caligiuri, Tarique & Jacobs, 2009). This certainly seemed true at Dell, where Kevin emphasized that his background working with Asian nationals contributed to his selection as an expatriate.

Lastly, an incredibly important characteristic of an employee's experience abroad is their family. While it is illegal to select or discriminate against employees based on their family structures, it is important to speak with employees about the consequences of their decision to go abroad. There are many characteristics that affect the success of a family's cross-cultural adjustment (adaptability, family cohesion, interest in relocation), but all families must challenge themselves to restructure, develop and adapt to their new environment (Ali, Van der Zee, & Sanders, 2003). According to numerous articles, family situation has generally been found to be the most important factor when transitioning abroad, and spousal adjustment is a critical determinant of assignment completion, of expatriate adjustment, and successful expatriate performance, and a negative predictor of expatriate withdrawal thoughts (Arthur & Bennett, 1995). It has also been found that employees with more children tend to experience more work-family conflict while abroad, which is negatively related to job satisfaction (Netemeyer, Boles, & McMurrian, 1996). Since selection cannot be based on an employee's family situation or the family's cross-cultural abilities or characteristics, it is important that all family members are included during the training aspect of the transition abroad to help them develop the skills needed to adapt successfully. This means that the employee's family should be included in cross-cultural training, realistic job (and life) previews, and potentially job placement assistance for the spouse.

In addition to the spouse's struggles, children are also importantly affected by a transition to a new culture. This life-changing move has been found to seriously affect children of all ages in terms of social and psychological problems. In fact, a staggering 50 percent of 13 to 18-year olds who engaged in domestic or international relocation experienced problems relating to, but not limited to, an inability to make new friends, missing old friends and difficulties transitioning

into the new school (Brett & Werbel, 1978). Studies have found that three to five year olds may suffer from emotional difficulties caused by misinformation and misrepresentation, and 14 to 16 year olds may suffer from enhanced doubt and uncertainty regarding social issues (Gaylord, 1979). Additionally, teenage children may experience a sense of loss of control of their lives and can suffer from psychological problems related to this loss (Stuart, 1992). There are also positive aspects of bringing children abroad, where the presence of a child can help the expatriate's adjustment. Children have been found to facilitate involvement with the local community and culture, which improves the employee's non-work satisfaction and adjustment (Douthitt, Macdonald, & Mullis, 1991). All of these findings lend support to the idea that the employee must consider all factors when selected to go abroad, and should maintain a realistic job preview, where the employee's spouse and children's needs are fully considered.

As previously stated, family issues are incredibly important when an employee is considering an international assignment, but that is to be determined by the employee, not the selection committee. In the interviews conducted, both Kevin and Linda found their single status to be as an asset when preparing to move abroad. As Kevin stated, he "put [his] entire life in a suitcase," and didn't have to worry about school systems or spousal employment like other expatriates might. On the other hand, John's family decided to remain in Boston, primarily because of the children and the desire to continue their education without interruption.

The next section will focus on solutions to address while training the employee and the employee's family.

Chapter Three

Pre-Departure Training and Preparation

Once an organization has selected an employee to partake on an international assignment, preparing that individual to live and work in a new culture can be a daunting task. In addition to the employee's responsibility to prepare for a new position, the employee must prepare themselves and their family members to live in a new culture, attend new schools, find new jobs, speak a new language, and experience countless other changes. As a result of these arduous demands, it is no surprise that the frustration and uncertainty caused by poor cross-cultural adaptation are key reasons why expatriates return home before the official end of their foreign assignment (Jassawalla, Truglia, & Garvey, 2004). To better acquaint the employee and the employee's family with the new culture, HR professionals should provide extensive pre-departure cultural training, providing them with the skills they need to successfully adapt and helping the family form realistic expectations about their new life abroad.

Cross-Cultural Training

Cross-cultural training (CCT) is defined as “the educative processes used to improve intercultural learning via the development of the cognitive, affective, and behavioral competencies needed for successful interactions in diverse cultures” (Eastwood & Renard, 2008). In short, cross-cultural training is the training process an employee undergoes to help adapt to the norms and behaviors of a new culture. CCT has been offered in multi-national corporations for decades, and has grown from 32 percent of companies utilizing it in the early 1980s (Tung, 1981; Tung, 1982) to approximately 63 percent in 2010 (KPMG, 2010). As shown in Figure 2, of the 1,201 companies surveyed in KPMG's annual GAPP survey, 57 percent of them provided CCT to the employee and the employee's spouse, and 37 percent provided CCT

to all members of the household (KMPG, 2010). In the interviews conducted, some form of CCT was available in all three companies (usually provided through an online resource). When asked about the low rates of CCT for children, most companies felt that, since the employee’s children often attend American or International schools, CCT is less important for them. This assumption can be costly, since CCT deals not only with the work/school aspect of adjustment, but with social adjustment to the host culture, as well.

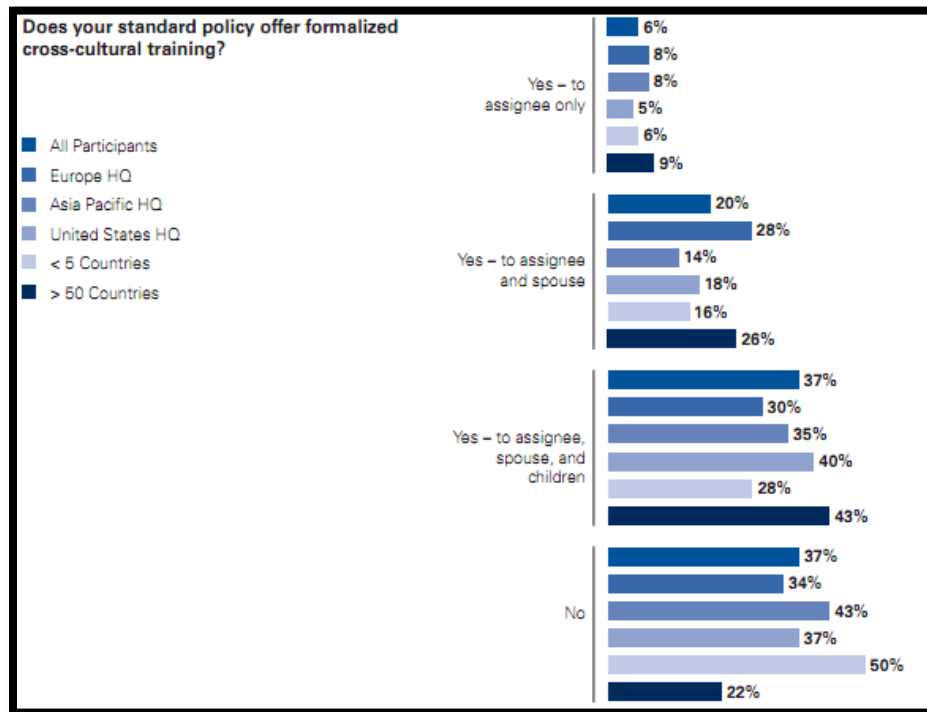


Figure 2: Companies’ Cross-Cultural Training Statistics (KPMG, 2010)

As described in an article featured in the *International Journal of Human Resource Management* in 2001, the objectives of CCT are split into three separate sections: determining appropriate cultural behaviors; coping with stress and reducing unexpected conflict; and creating realistic expectations (Caligiuri, Phillips, Lazarova, Tarique, & Burgi, 2001). Unfortunately, due to the lack of empirical articles surrounding CCT, there is no clear answer as to the best theories or best practices when administering CCT (Littrell, Salas, Hess, Paley, & Riedel, 2006). Four

proposed theoretical frameworks have received considerable attention regarding CCT, including social learning theory, the U curve of adjustment theory, culture shock theory and the sequential model of adjustment.

The social learning theory focuses on the employee's ability to observe and replicate actions from the host-country nationals (Black & Mendenhall, 1990). To administer a CCT program that uses social learning theory, HR professionals would create a structured environment in which the employee could observe and replicate behavior. According to the theory, after observing the culturally appropriate behavior, the employee would be able to replicate the behavior observed while they are abroad.

The U curve of adjustment theory focuses on adjustment as a function of time, where the employee's attitudes are heavily dependent on the amount of time spent in the new country (Littrell, Salas, Hess, Paley, & Riedel, 2006). This theory suggests that the individual would be excited and optimistic upon arrival, become confused and frustrated after the "honeymoon" period ends, only to recover and progress to near complete adjustment (Church, 1982). This theory, while seemingly logical, can be criticized for its lack of specificity regarding amount of time in each stage and its lack of clear direction.

Culture shock is defined as "a normal process of transition, adaptation and adjustment in which an individual who enters a foreign environment for an extended time period experiences cultural stress involving some degree of anxiety, confusion, disruption, helplessness, and irritability," and can relate to CCT in two different ways (Befus, 1988; Church, 1982). The first approach, as seen in an article featured in the *International Journal of Intercultural Relations* in 1998, suggests that the problems encountered while experiencing culture shock should closely match the treatments and trainings offered by CCT (Befus, 1988). The second approach, as seen

in an article featured in the *International Journal of Human Resource Management* in 2001, emphasizes the accuracy of the employee's expectations so that the individual is more likely to be satisfied, committed and adjusted while abroad (Caligiuri P, Phillips, Lazarova, Tarique, & Burgi, 2001).

Lastly, the sequential model is based on the mindset that that CCT is a process and cannot be completed in one day (which, unfortunately, was the norm throughout the 1990s), but should rather be conducted simultaneously during the employee's transition (Selmer, Torbiörn, & de Leon, 1998). This process would: 1) prepare employees for culture shock before they depart their home country, 2) reduce ethnocentrism by emphasizing cultural awareness upon arrival, 3) teach them how to learn from their new environment after feeling confident interacting in their new culture, and 4) increase their confidence by organizing social events with host nationals where the expatriate receives instant feedback. The enormous amount of involvement and employee support may suggest that the sequential model is the most effective theory, but it should be noted that parts of the sequential model have not been empirically tested, and therefore should be used with caution (Littrell, Salas, Hess, Paley, & Riedel, 2006).

In addition to a CCT program, companies should also provide basic language training. Teaching the employee and family how to speak the host language should be a relatively obvious concept, and most companies seem to have recognized this need. As shown in the KPMG study, 77 percent of companies surveyed offered language training to employees, with 70 percent of the companies also providing some language training for the families of the expatriates (KPMG, 2010). The interviews revealed that IBM and Dell offered specific language assistance, but Linda from VWR received no such training. According to VWR's long-term international assignment policy, upon approval from the host HR group, the host company can provide a maximum of 30

hours of training to the expatriate and the accompanying family. Linda stated that, at the time, language assistance would have been charged to her allowance (it was not a free service provided by the company), and Linda did not anticipate a need for language training, since business was going to be conducted primarily in English and “Mandarin is really hard to learn in two years.”

Managing Expectations

One common theme throughout the CCT programs highlighted is the emphasis on realistic expectations as to what the employee expects from their experience abroad. Employees often create inaccurate expectations surrounding their assignment, especially when provided with ambiguous information regarding their assignment (Littrell, Salas, Hess, Paley, & Riedel, 2006). One method that has proved successful in providing accurate information is the usage of a realistic job preview (RJP), which is the process of providing both favorable and unfavorable job-related information to employees prior to starting their assignment (Premack & Wanous, 1985). According to numerous studies, RJP promotes accurate initial expectations, helps employees develop coping mechanisms to handle workplace stress, increase perception of employer concern, and has reported lowered expectations, higher job satisfaction, higher job performance and lower employee turnover (Premack & Wanous, 1985). The RJP process can include videos, verbal presentations, job tours and brochures; all of which help the employee shape expectations by understanding the realities and demands of their new role.

When an employee is selected to complete an international assignment, there is an additional need to provide a realistic living conditions preview (RLCP) to the employee (Richardson, McBey, & McKenna, 2008). Similar to an RJP, the RLCP describes the favorable and unfavorable information based on the “general living environment in the host country”

(Templer, Tay, & Chandrasekar, 2006). According to an article featured in *Group & Organization Management* in 2006, employees who undergo RCLP are more likely to have a positive general adjustment and an accurate perception of their general living conditions (Templer, Tay, & Chandrasekar, 2006).

Although the theory of RLCP is a relatively new one (the 2006 Templer et al. study claimed to be the “first empirical study on...realistic [living condition] preview”), companies seem to be accepting and incorporating the theory into their HR practices (Templer, Tay, & Chandrasekar, 2006). To successfully form realistic expectations in the employee as well as the employee’s family, many companies sponsor pre-assignment visits to the host country, schooling assistance, job placement assistance for spouses, as well as housing assistance to assist the family’s transition. According to KPMG’s 2010 survey of global CEOs, approximately 85 percent of companies offer a pre-assignment visit to the employee and 65 percent of companies offer a pre-assignment visit to the spouse (KPMG, 2010). Linda engaged in a VWR sponsored pre-assignment visit to Shanghai, which she found helpful in her adjustment. When the employees (and potentially families) visit their new environment during their trip, it is important to emphasize that they explore the office, neighborhood, local religious institutions and schools while they are there to gain a realistic perspective of what their new life will be like (Jassawalla, Truglia, & Garvey, 2004). If families only visit tourist attractions and partake in leisurely activities, they will likely be disillusioned to the realities of life in the new culture.

Additionally, 97 percent of companies surveyed provide their employees with housing assistance in the new culture, and 78 percent provide temporary housing in the home country prior to departure to alleviate stress (KPMG, 2010). This support was especially evident for Kevin’s expatriation. According to Kevin, Dell not only provided temporary housing for five

weeks, but also took care of visas, permits and health screening tests. Dell even covered the closing cost on the sale of his two homes. As for family assistance, 92 percent of companies surveyed provide schooling benefits for school-aged children and 66 percent of companies provide assistance for spouses/partners whose careers are interrupted as a result of expatriation (KPMG, 2010). As evident by the figures featured in KPMG's GAAP survey, companies recognize the difficulties of transitioning to a new culture, and are increasingly providing support to expatriates and their families.

After the employee has received the proper training, companies must continue their communication with the expatriate while they are abroad. The next section will focus on some of the common issues employees encounter while adapting to their new surroundings and returning home after completion of their international assignment.

Chapter Four

Supporting and Repatriating Employees

After employees have been selected and trained to engage in an international assignment, it is crucial that the organization stay in contact with them and continue to support them in their transition and adaptation to the new culture. At this point, due to the cross-cultural training, language skills development and realistic job preview, employees should be relatively prepared to live and work in their new culture. With that being said, there is still a significant amount of attention and support that HR needs to communicate to expatriates so they can have an enjoyable, meaningful and worthwhile experience. HR also must account for the career development of employees and plan for their role upon return to ensure that employees find value in their international experience and personal sacrifice. When employees repatriate, they will return with more skills, higher expectations of career advancement, and more employment options elsewhere as well. HR must make sure that the company's investment into the employee is developed within the company and that the employee doesn't seek employment at a different firm. According to an article featured in *Human Resource Planning* in 2005, expatriates who perceive little career support seek employment elsewhere (McCaughey & Bruning, 2005).

Unfortunately, many companies seem to struggle when it comes to addressing these needs, thus contributing to the 40 percent of employees who leave their assignment prematurely (Black & Mendenhall, 1990) and the 38 percent of employees who leave their home company within a year of repatriation (Brookfield GRS, 2010). The process of supporting employees while abroad and repatriating them upon return is a large problem within the business community, and has been well-documented for years. As shown in a meta-analysis of over 70 studies featured in the *Journal of Applied Psychology* in 2002, perceived organizational support

is related to increased affective organizational commitment, increased performance and reduced withdrawal behaviors (Rhoades & Eisenberger, 2002). Following an investigation into the causes of this turnover, it is clear that employee dissatisfaction stems from four different sources: lack of communication while abroad, role ambiguity while abroad; lack of support while abroad; and insufficient repatriation training.

Keeping In Touch

When employees depart on a long-term international assignment, one of their largest sacrifices is the withdrawal from their friends, families and coworkers back home. One of the biggest issues faced by Linda in her repatriation process was the loss of her “underground/informal” network. Upon her return to the U.S., Linda reportedly struggled to re-assimilate herself into her home organization, stating that she no longer felt part of her home network and had to come back to a lot of new faces. This not only has personal implications, but being absent from the office can put large strains on one’s professional network, and can damage an employee’s career development. According to Harvard Business School’s Career Development website, 65 to 85 percent of jobs are found through networking, which means that expatriates are risking future employment by leaving their network for extended periods of time (Harvard Business School, 2011). Additionally, according to an article featured in *SAM Advanced Management Journal* in 2004, employees tend to adopt feelings of isolation and a loss of connection with events in the home office while engaging in international assignments (Jassawalla, Connolly, & Slojkowski, 2004). To help employees and employee families feel connected to life in their home country and help build networks abroad, companies should offer open, regular communication with employees, offer support groups abroad and enable employees and their families to visit home while abroad.

With the constant advancement of technology, communicating across borders is no longer a complicated, expensive process and can be performed easily using e-mail, inter-office communicator applications, social networking sites (LinkedIn, Facebook) and free video-conferencing programs such as Skype. The ease of communication also makes it easy for HR managers to maintain communication with employees abroad and give them the support that research has shown to be critical to the success of their assignments. A home office's frequent communication with employees abroad signals "a) the importance of the overseas assignment to the expatriate manager and the organization, significantly improving the manager's motivation and morale, b) the company's view that they are still part of the organization, and participating in its activities, and c) the firm's intention to keep them abreast of any changes in the organization in which they must assimilate upon return" (Jassawalla, Connolly, & Slojkowski, Issues of effective repatriation: A model and managerial implications, 2004). In summary, constant communication builds trust, increases loyalty, increases feelings of involvement and prevents employees from losing their professional network at home.

Companies who fail to communicate with employees not only miss an opportunity to build trust, loyalty and involvement, but also develop employee resentment towards the company. Employees who perceive a lack of support while abroad have been shown to have dramatically higher feelings of dissatisfaction, resentment and anxiety, as well as lowered feelings of loyalty and motivation (Jassawalla, Connolly, & Slojkowski, 2004). These feelings endure throughout the employee's assignment and can permeate into their repatriation, causing continued dissatisfaction, resentment and newfound defensiveness at home. The employee's resentment towards the organization and a lack of motivation are likely both common contributors to the high turnover figures commonly seen within the first year of repatriation.

In addition to providing communication with the employee across borders, HR should foster the employee's inclusion into the new culture by organizing networking events within the host country. As an article in *Human Resource Development Review* in 2006 pointed out, an employee's transition and effectiveness while abroad relies on support systems "including fellow expatriates as well as host nationals" (Littrell, Salas, Hess, Paley, & Riedel, 2006). Although there is little documented research regarding organized host support systems, an exploratory study interviewing multiple expatriates shows that many employees wish they had a support system where they could interact with fellow expatriates and host country nationals together (Jassawalla, Connolly, & Slojkowski, 2004). This type of informal interaction could help expatriates create support systems consisting of both host nationals and other expatriates to help cope with their culture shock; ask cultural questions in a safe, judgment-free environment; and find new business opportunities for collaboration while abroad. While this type of event might be hard for an organization to organize single-handedly, HR professionals could provide the resources and support to an individual or an organization abroad to take the lead and organize it themselves. In Linda's case, an informal network of expatriates and host nationals alike would have been very helpful in her transition abroad. Since Linda expatriated without any family, she felt isolated and lonely at times, and would have liked a support system to ensure that her work-life balance was in check. Unfortunately, since she was one of only two VWR expatriates in the whole region, VWR did not have the resources to provide a sufficient support system for her.

Lastly, to help employees and their families stay in contact with family and friends back home, many companies sponsor a "home leave" program, where employees have a chance to travel home as a vacation. According to KPMG's annual GAPP survey, 94% of companies provide a home leave for employees and their families, helping them reconnect with their

friends, family and coworkers in their home country (KPMG, 2010). Visits also have been shown to significantly contribute to the expatriate's feelings of connectedness and loyalty to the organization (Klaff, 2002; Poe, 2000).

Career Counseling

In addition to ensuring communication and trust across international borders, employees must feel confident in their international assignments and how they contribute to their overall career goals. When employees choose to accept international assignments, they are making a big sacrifice for the organization, so it is the organization's responsibility to make sure the employee returns to a new, fulfilling role that meets the employee's expectations. To ensure that expatriates are satisfied with their role abroad and how it aligns with their career goals, companies should offer career counseling to them and highlight how their newly acquired skills will help them advance within the company.

The beginning of this process should include an explanation to the employee addressing a) the explicit clarification of the reasons for sending the individual abroad, b) the benefits of the international assignment to the firm and the individual, and c) the individual's opportunities upon repatriation into the home country (Jassawalla, Connolly, & Slojkowski, 2004). This explanation would clearly define the employee's worth to the company and also help reduce the anxiety that is often developed by expatriates who are unsure about their repatriation process (Jassawalla, Connolly, & Slojkowski, 2004). Although it is often difficult for organizations to clearly define or predict employee roles so far in advance, the acknowledgment of their sacrifice and the act of planning ahead would help reinforce the employee trust in the company.

Concerning the issue of employment after the expatriate returns, employees often assume that they will be more valued within their organization, receive quicker promotions and obtain

positions easier due to their international experience (Brookfield GRS, 2010). According to many researchers, this mindset is justified. In an article featured in *Human Resource Planning* in 2005, expatriates are shown to acquire many desirable skills from their experiences abroad, such as market-specific knowledge, network skills, personal skills and job-related management skills, as well as general management skills (Fink, Meierwert, & Rohr, 2005). When employees return to their home organization, they expect more out of their next role, but rarely know exactly what their next assignment will be, or how it will affect their career development. According to the Global Relocation Trends survey sponsored by Windham International in 1997, 50 percent of expatriates are unsure of how their international experience will affect their careers (Windham International, 1997). One potential cause of this issue is the fact that companies don't seem to know either. As shown in Figure 3, only 50 percent of organizations plan international assignee returns over six months in advance of their repatriation, and 14 percent of organizations "don't have the opportunity to plan the assignee's repatriation" (KPMG, 2010). This lack of organizational planning is dangerous and can lead to the dreaded "out of sight, out of mind" syndrome (Hauser, 1999).

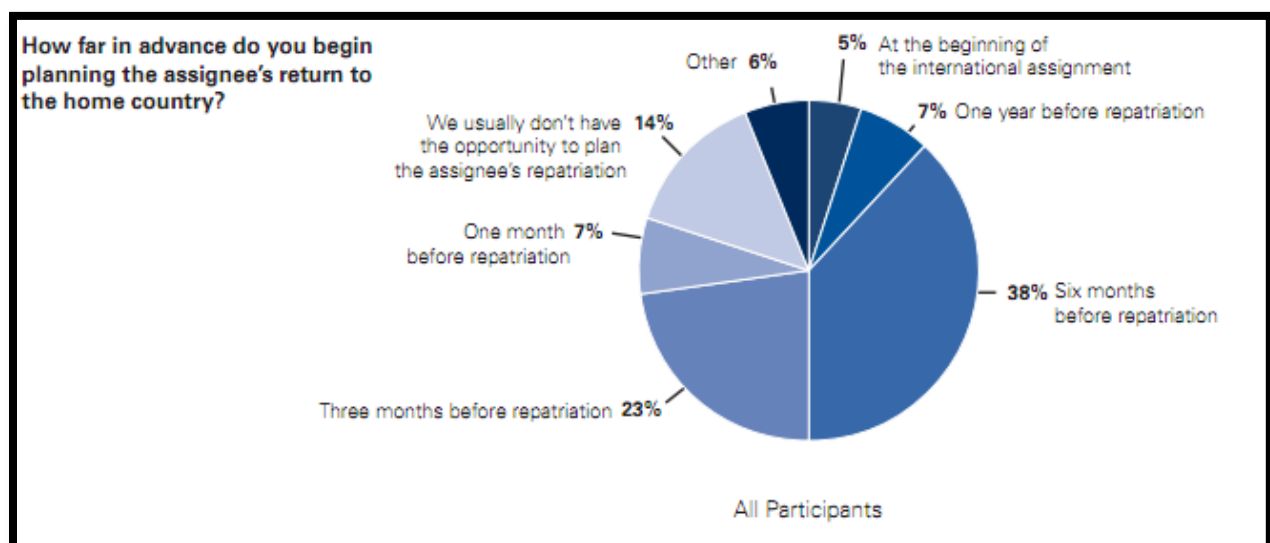


Figure 3: Repatriation Preparation (KPMG, 2010)

Employees who suffer from the “out of sight, out of mind” syndrome are expatriates who return to a largely oblivious office to the status of their employment. As a result, employees often receive their old jobs, or fill current vacancies within the organization (which are normally lateral moves, if not demotions). Although this practice clearly shows disrespect towards the employee and exhibits a serious lack of talent management, it does happen (Poe, 2000). Unfortunately, Linda experienced this lack of talent management first-hand. Upon return to Pennsylvania, Linda was assigned to serve as a Director of Internal Audits, which involved work she had never performed before. In Linda’s words, “I came back to a job that I had no experience at...I’m not an auditor. I’ve never had that in my background [and] coming into that background was tough.” Linda received “absolutely no support” in her re-entry process and described the transition as very hard.

Unfortunately, this mishap is surprisingly common, as shown by the International Assignee Research Project, which finds that a staggering 77 percent of expatriates receive no career counseling from their employers upon repatriation, and only 6 percent of them are offered re-entry training (Jassawalla, Connolly, & Slojkowski, 2004). This large disparity between career expectations and lack of organizational pre-planning can be devastating for the employee’s feelings of self-worth and loyalty to the company, thus contributing to the high turnover rates within the first year of repatriation (Naumann, 1993).

A Domestic and International Resource

A complement to career counseling that has received a lot of positive support from research and case studies alike has been the adoption of a mentoring system for employees while they are abroad. Although this process has only been formally adopted by 10% of companies surveyed by KPMG in their 2010 study, a mentoring program improves expatriate adjustment,

knowledge assimilation, knowledge transfer, productivity (for the expatriate and the mentor) and repatriation success (KPMG, 2010; Mezias & Scandura, 2005). To provide an expatriate with the best support possible, HR professionals should assign two different mentors: a home-country mentor and a host-country mentor.

A home-country mentor is a person from the employee's home country who helps link the expatriate to the global organization and helps sort through expatriation issues (Jassawalla, Asgary, & Sashittal, 2006). Expatriates who report satisfactory repatriation processes often identify home-country mentors as an important contributor to their personal experience, which isn't surprising considering the amount of support that mentors provide (Jassawalla, Asgary, & Sashittal, 2006). Home-country mentors support employees vocationally and psychosocially; maintain contact during the pre-departure stage of the assignment; encourage learning and provide vital information during the expatriation and help expatriates reintegrate into their home culture during repatriation (Carragher, Sullivan, & Crocitto, 2008). The home-country mentoring program has also been shown to have a significant positive effect on the international employee's organizational knowledge, job performance and promotability (Carragher, Sullivan, & Crocitto, 2008).

The position of home-country mentor ideally should be filled by employees who are at a higher organizational level than the expatriates, due to their deeper understanding of the firm's global strategy and their ability to assess how to best utilize experience and knowledge gained from international experiences (Mezias & Scandura, 2005). Additionally, higher-status mentors have been found to provide more coaching, career advice and vocational support than peer mentors (Kram, 1985).

One of the most helpful aspects of home-country mentors is their ability to increase the visibility of expatriates into their home network, thus keeping them “in the loop” regarding structural changes and job openings (Kamoche, 1985). Since leaving an office can critically damage one’s personal and professional network, it is very important that employees maintain communication with their home office through their home-country mentor and stay informed about the office politics and job openings. A close expatriate-mentor relationship can lead to the mentor serving as a “confidante and advocate, [a] scout for opportunities that managers can pursue within the firm upon their return... [ensuring] the returning manager’s skills are used by the firm,” thus reducing the effects of the “out of sight, out of mind” syndrome (Jassawalla, Connolly, & Slojkowski, 2004).

Host-country mentors, on the other hand, are used primarily to assist employees with cross-cultural adaptation (Jassawalla, Asgary, & Sashittal, 2006). Although host-country mentors are usually utilized only during an employee’s assignment, they have been shown to provide significant support in the expatriate’s transition to the new culture and, as a result, help employees to grow professionally. According to an article in the *Journal of International Business Studies* in 2008, host-country mentors have a positive effect on the organizational knowledge, organizational knowledge-sharing, job performance and promotability of expatriates, and their perceptions of teamwork while abroad (Carraher, Sullivan, & Crocitto, 2008). Coupled with the employee’s extensive cross-cultural knowledge as a result of their CCT, a host-country mentor would help ease an employee into a new assignment by guiding the employee through the challenges of the local organizational and cultural differences.

Although providing two mentors might seem like a lot of investment into the employee, studies have shown that neither home nor host-country mentor are “able to meet all the needs of

the expatriate...and that both kinds of mentors are needed to increase the likelihood of a successful international assignment” (Carragher, Sullivan, & Crocitto, 2008). Additionally, since organizations are already investing millions of dollars into their expatriates, an additional investment which helps increase performance, promotability within the organization and eases the difficulties associated with repatriation seems well worth it (Stahl, Miller, & Tung, 2002).

One way to curb costs is to forego the formal mentoring process and utilize pre-existing mentors. Kevin had the option of adopting a formal mentor, but decided to rely on his pre-existing relationships to help support himself during his transition, and to search for future opportunities when his assignment ends.

Going Home

Lastly, companies must recognize the need for formal repatriation policies and not simply assume that the transition home will be easy compared to the expatriation process. According to a regional director of international assignment services for Deloitte & Touche, LLP, “repatriation is harder than expatriation. People don’t expect to have to adjust to home, but that is precisely what makes it so difficult. After being gone for several years, the assignee is facing a world of changes – personally, culturally and professionally. The culture shock is real” (Poe, 2000). This reverse culture shock of returning home is a serious problem, defined as the “process of readjusting, reacculturating and reassimilating into one’s own home culture after living in a different culture for a significant period of time,” which can be linked to cultural identity conflict, social withdrawal, depression, anxiety, interpersonal difficulties, as well as a host of other issues (Gaw, 2000). Reverse culture shock is a concept that must be addressed in the company’s repatriation process.

Luckily, companies have noticed the need for effective repatriation strategies and have made great strides in providing formal repatriation programs to their employees. The number of organizations that offer such programs has grown significantly; in 1998, only 31 percent of U.S. firms had formal repatriation programs, whereas 61 percent of organizations in KPMG’s 2010 GAPP survey offered some sort of formal repatriation assistance (Hauser, 1998; KPMG, 2010). As shown in Figure 4, while the number of firms that offer some formal repatriation assistance has improved, a full 39 percent of organizations still offer no such service (KPMG, 2010). Based on the research, the number of firms that offer formal repatriation assistance should consider investing in it, given the multiple risks involved with underutilizing talent, losing human capital and discouraging future overseas assignments (Gregersen & Black, 1995).

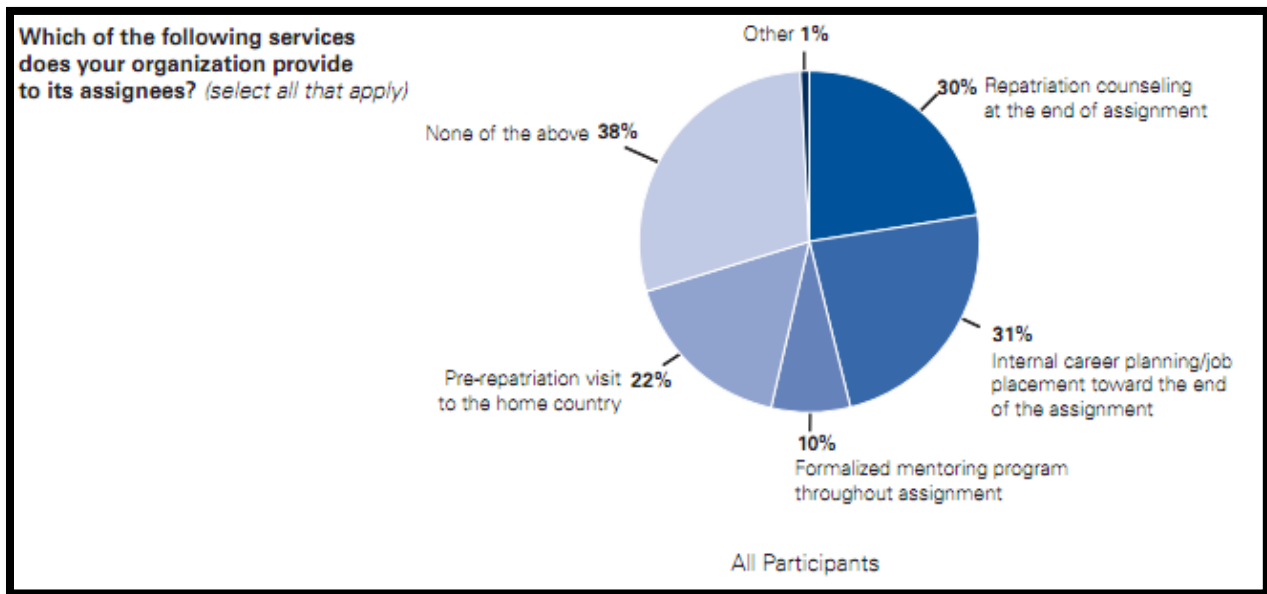


Figure 4: Repatriation Assistance (KPMG, 2010)

A bigger risk seems to be the amount of time that companies prepare for the repatriation of their employees. According to an HR representative from PricewaterhouseCoopers, “planning for repatriation should begin the day of selection,” meaning that companies should actively support and plan for the career development of their employees throughout the entire

expatriation process (Poe, 2000). As shown before in Figure 3, 50 percent of companies neglected to begin the repatriation process six months in advance of the employee's return, and a staggering 14 percent of companies didn't "have the opportunity to plan the assignee's repatriation" (KPMG, 2010). While all of the companies surveyed have a formal policy stating that repatriation preparation starts at least six months in advance, they do not specify the steps that should be taken during the preparation process. Although six months seems like a sufficient period of time to properly prepare for an expatriate's return, this length of time often is inadequate, especially if the only advanced preparation deals with administrative paperwork and delays the more important aspects of repatriation (such as job selection and reverse culture shock training).

Lastly, companies should strive to help their employees professionally upon return by giving employees new roles that utilize their newly acquired skills. According to the Global Relocation Trends survey in 1999, 76 percent of companies stated that the most effective way of safeguarding repatriate turnover is to provide opportunities that use the employees' foreign experience (Windham, 1999). This practice not only helps retain employees, but also helps firms maximize their investment into the growth of their former expatriates.

Chapter Five

Discussion

As discussed throughout this paper, expatriation is a vital capital intensive and risky process within the business world, and requires more research to fully understand its complexities. This paper should help HR professionals understand and begin to address the multitude of obstacles facing expatriates, and hopefully inform them about the best practices to implement within their respective companies. HR professionals should not rely solely on these findings, however, given that research is constantly evolving and numerous limitations existed while researching this topic.

Limitations

While the definition of expatriation is relatively universal, the implications, struggles and processes in individual cultures differ greatly, and generalizing across cultures can pose many problems. This paper focused on the most current and relevant articles that study expatriation, but did not make the effort of differentiating between findings based on the nationality of the expatriates. While many difficulties experienced by expatriates can be generalized across cultures (e.g. culture shock, reverse culture shock, family support), there are some cultural dimensions that have the potential of changing results, based on the country's attitudes. For example, countries that receive low scores on Hofstede's cultural dimensions for individualism (Venezuela, Taiwan, Indonesia) might require more mentoring support than countries that have high scores of individualism (U.S.A., Australia, U.K.) (Hofstede, 2009).

Additionally, a country's exposure and cultural similarities to other cultures may affect how detailed an expatriate's preparation needs to be. For example, if an American businessman is required to live and work in Canada for an expatriate assignment, it is assumed that the

cultural differences would be minimal. According to Hofstede, the cultural dimensions of Canada and the U.S. have a lot in common, so there wouldn't be too much of a culture shock (Hofstede, 2009). On the other hand, if an American businessman is required to live and work in China, there exists a great deal of cultural differences (according to Hofstede), which could potentially complicate the employee's transition.

This paper does not delve into the country-specific interactions simply because there is not enough time or space to provide such a broad amount of information. The dynamics of home/host country pairings are unique, and information regarding the specific differences between the two cultures requires a lot of research. As shown in Figures 5 and 6, the number of companies featured in KPMG's 2010 survey alone would have provided too many possibilities for one study to cover effectively.

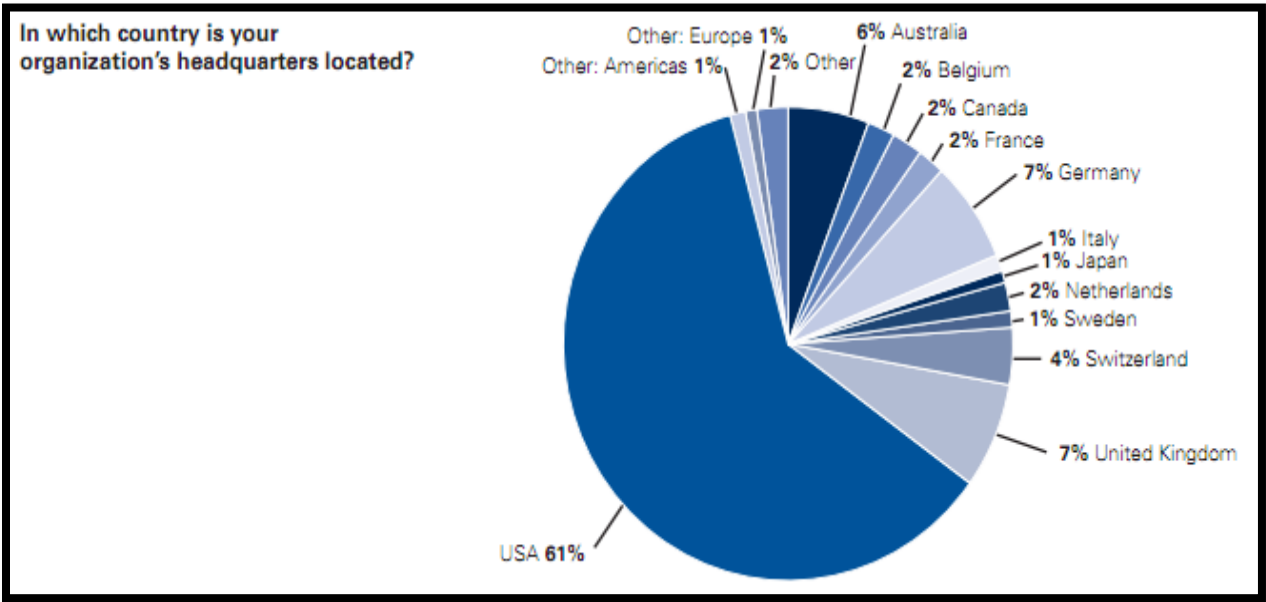


Figure 5: KPMG Countries Sampled (KPMG, 2010)

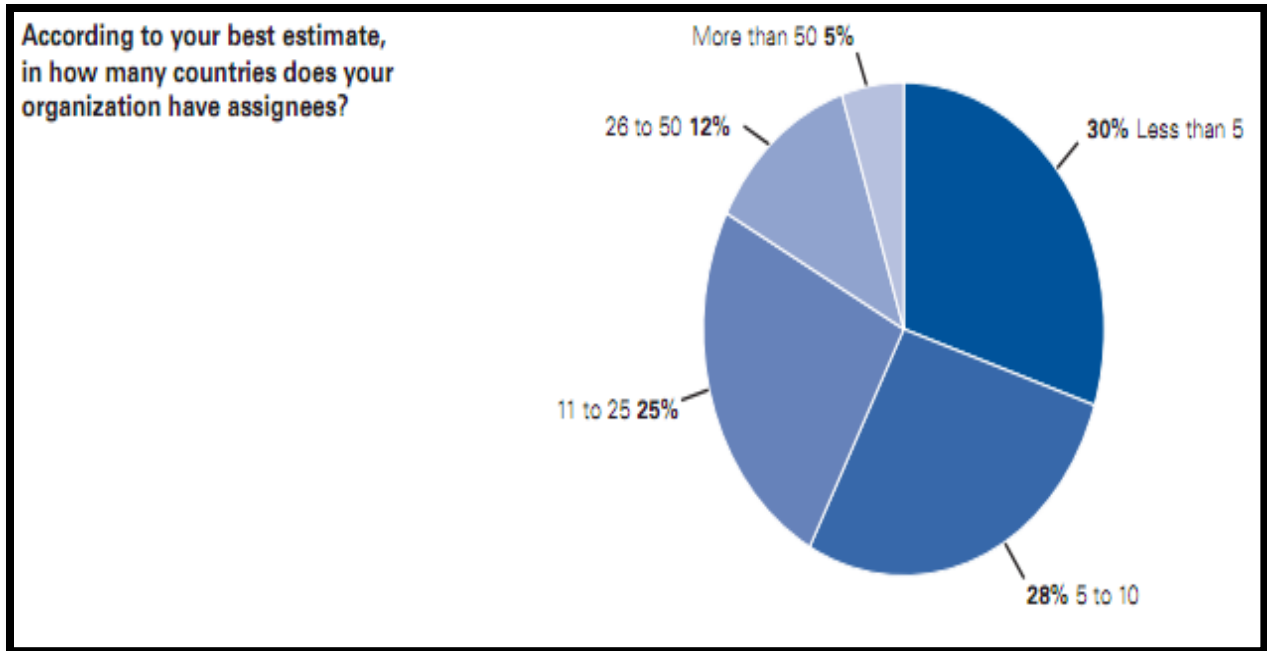


Figure 6: KPMG Number of Countries hosting Expatriates

A limitation similar to cultural differences is that of employee differences. As stated earlier, organizations typically send employees abroad to assume one of four different roles: a structure reproducer (to create a structure that replicates a structure successful in another location); a troubleshooter (to analyze and solve a specific problem); an operational element (to perform as an acting element in an existing operational structure) or the chief executive officer (to oversee the entire foreign operation) (Hofstede, 2009). Although obviously there is a difference in the requirements of a troubleshooter compared to a chief executive officer, there is no easy way of differentiating this information given the current literature.

Another limitation that exists in this paper is the issue of cost. The adoption of such amenities as home leaves, career support for spouses and pre-departure living assistance can add to an already large investment. It should be noted, however, that an unsuccessful expatriate experience will cost a company a dramatic amount of opportunities costs. Additionally, there are many simple, inexpensive methods highlighted throughout this paper that can assist HR

departments that are on tight budgets. For example, a home-country mentoring program can be implemented with little or no additional cost, and has been shown to have a significant positive effect on the international employee's organizational knowledge, job performance and promotability. The key of this paper is not to reformat a company's entire expatriation strategy, but to provide companies with best practices that HR professionals can consider for adoption.

A limitation regarding the interviews conducted of employees was a lack of family involvement. While John had a wife and children, his family decided to stay in Boston while he spent the majority of his time in Scotland. Conversations with employees who moved abroad with their families, or possibly with the family members as well, might have provided some helpful insight into a very complicated expatriate issue.

Lastly, one large caution that should be noted is the fact that many of these theories need more research. This does not mean that these are untested theories, but it does mean that, to be universally accepted, some of these theories require further empirical testing. Due to the difficulty in conducting expatriate experiments with large sample sizes, some of the articles featured were qualitative studies. Data from these studies should be used with caution due to their low sample sizes and, thus, low external validity. Additionally, since many of these theories are relatively new (e.g., the Templer et al., 2006 study claimed to be the "first empirical study on...realistic [living condition] preview"), further research should be conducted and consulted.

Trends

One major trend in expatriation, as seen in John's case, is the replacement of long-term expatriation with "commuter" visits. Robert stated that he "can count the number of full-time expatriates [VWR has] had in the past five years on one hand" and claims that this new kind of expatriation "is the new trend." This type of international work is characterized by an employee

essentially leading two lives. Employees have offices in both the home and host country, have permanent or semi-permanent places to stay in both countries, and thus feel no pressure to move their families abroad. This phenomenon can eliminate many problems associated with expatriation, but it also can have the potential to develop deeper issues of mistrust by host-country nationals, job burnout for employees, and family conflict. John's "commuter" expatriate experience with Digital Equipment Corporation placed a heavy strain on his communication with his family in Boston, and was one of his largest challenges while abroad. Additionally, John initially felt like an outsider to the Scottish employees, but "the importance of a long-term assignment is that you can overcome that barrier." Through his commitment to the role and open communication with the employees, he established professional working relationships with his Scottish coworkers.

Another trend is the shift from employees leaving developed countries (U.S.A., U.K.) and going to less developed countries (Asia-Pacific), to employees leaving developing countries to partake in an international assignment in a developed country. According to PwC's Global CEO Survey, finding and developing local talent in high growth markets is a large issue that many companies face (PwC, 2011). As seen in a Manpower survey in 2010 of 35,000 employers worldwide, 41 percent of employers had difficulty filling positions in Asia-Pacific, which is 10 percentage points higher than the global average (Manpower, 2010). To solve this issue, many organizations are sending employees from their global offices to the company's home office, in hopes that the company will increase their global knowledge, and that the international employees will take their newly acquired skills home with them.

Examining Corporate Practices

After analyzing the expatriate policies and employee feedback from Dell, IBM and VWR, certain patterns were discovered that highlight some of the largest difficulties facing companies who engage in expatriation. One common complaint was that of support while abroad. While John didn't feel that his transition from the U.S. to Scotland required much HR support, Kevin and Linda both expressed difficulty in transitioning to the Chinese culture, and wished that more had been done to support them while abroad. Linda emphasized increased communication and social networking programs, while some of Kevin's bigger problems came from small oversights on Dell's part (like registering for an international credit card).

Another problem that seemed to arise was the lack of consistency between formal HR policies and the policies that were actually implemented. Many employee assistance programs that were highlighted in VWR's long-term international assignment policy were not utilized for Linda, simply because she did not know they existed. Unfortunately, Linda was transferred abroad before Karen G produced the formal guide, so many of the benefits highlighted in the policy were unavailable to her. Karen's completion of the guide and its acceptance across VWR should help ensure consistency in practice in the future, and ensures that employees are offered appropriate assistance.

Future Research

Many questions surrounding best practices remain unanswered or have not been demonstrated definitively. The possibilities for further research of expatriation are endless. In particular, there seems to be a lack of consensus regarding the best methods of administering cross-cultural training (CCT) and a lack of research regarding realistic living condition preview (RLCP), international networking events, the sequential method of CCT and outcomes dual-

mentor outcomes. Additionally, as stated before, there is a need for empirical tests for many of these theories to be proven successful. Given the growth and widespread acceptance of expatriation, researchers should continue to examine expatriate trends and best practices regarding international business. Partaking in an international assignment is a large personal and professional sacrifice that should be treated with special attention, should be rewarded properly, but should also prove beneficial to the company who sent the employee. Without the continuance of empirical research and the drive to provide a better expatriate experience, companies face a risky and costly future.

Appendix A

All information was collected from employee interviews, company websites, Finance.Yahoo.Com and Forbes.com.

Company 1: IBM

IBM is a public company that provides information technology and consulting services worldwide. IBM is based in Armonk, NY. In 2010, IBM's revenue equaled \$95.8 billion. Between 2010 and 2011, IBM has received recognition as the 33rd largest company in the world by *Forbes*, the 2nd best global brand by *Interbrand* and the 15th most admired company by *Fortune*.

IBM Employee #1: John Dischinger

John Dischinger is a Program Director at IBM, and completed a two year expatriate assignment as a Supply Chain Manager for Digital Equipment Corporation in Scotland in 1998. John's experience is unique in that he primarily worked in Scotland, but returned to his home office in Boston for about one week out of each month. Because of this continued connection home, John's family did not relocate and he spent a lot of time traveling between the two countries.

Although John's experience does not fit into the classic definition of a "long-term expatriate assignment," his experience provides insight into a trend that has appeared in expatriation.

IBM Employee #2: Karen Orenstein

Karen Orenstein is Workforce/Talent Management Partner at IBM, and works with sending and receiving expatriates.

Company 2: Dell Inc.

Dell Inc. is a public company that designs, develops, manufactures, markets, sells and supports mobility products across the world. Dell is based in Round Rock, TX. In 2010, Dell's revenue equaled \$52.9 billion. Dell is the 38th largest company in the United States, and has been recognized as 183rd in *Forbes*' "Global 2000" list.

Dell Employee #1: Kevin Callanan

Kevin Callanan is the Director of Procurement at Dell, and is currently working in Shanghai, China. His assignment started in May 2010.

Company 3: VWR International LLC

VWR International LLC is a private company that supplies and distributes laboratory equipment worldwide. VWR is based in Radnor, PA. In 2009, VWR's revenue equaled \$3.56 billion. In 2009, VWR ranked #106 in *Forbes*' list of America's largest private companies.

VWR Employee #1: Robert Gabe

Robert Gabe is a Director of Employee & Labor Relations at VWR.

VWR Employee #2: Karen Grafje

Karen Grafje is a Director of Compensation at VWR and constructed VWR's long-term international assignment policy.

VWR Employee #3: "Linda"

"Linda" is a Director of Internal Audit at VWR and worked in Shanghai, China as a Senior Finance Director for two years with VWR from 2008 to 2010.

Works Cited

- "Linda". (2011, April 12). VWR Expatriate Conversation. (K. Coleman, Interviewer)
- Ali, A., Van der Zee, K., & Sanders, G. (2003). Determinants of intercultural adjustment among expatriate spouses. *International Journal of Intercultural Relations*, 563-580.
- Arthur, W. J., & Bennett, W. J. (1995). The international assignee: The relative importance of factors. *Personnel Psychology*, 99-114.
- Befus, C. (1988). A multilevel treatment approach for culture shock experience by sojourners. *International Journal of Intercultural Relations*, 381-400.
- Black, J. S., Gregersen, H. B., & Mendenhall, M. E. (1992). Toward a theoretical framework of repatriation adjustment. *Journal of International Business Studies*.
- Black, J., & Mendenhall, M. (1990). Cross-cultural training effectiveness: A review and a theoretical framework for future research. *Academy of Management Review*.
- Brett, J., & Werbel, J. (1978). *The effect of job transfers on employees and their families*. Washington, D.C.: Technical Report to the Employee Relocation Council.
- Brookfield GRS. (2010). *Global Relocation Trends Survey*. Woodridge, IL: Brookfield GRS.
- Caligiuri, P. M., & Phillips, J. M. (2003). An application of self-assessment realistic job previews to expatriate assignments. *International Journal of Human Resource Management*, 1102-1116.
- Caligiuri, P., Phillips, J., Lazarova, M., Tarique, I., & Burgi, P. (2001). The theory of met expectations applied to expatriate adjustment: The role of cross-cultural training. *International Journal of Human Resource Management*, 357-372.
- Caligiuri, P., Tarique, I., & Jacobs, R. (2009). Selection for international assignments. *Human Resource Management Review*, 251-262.
- Callanan, K. (2011, April 8). Dell Expat conversation. (K. Coleman, Interviewer)
- Carraher, S. M., Sullivan, S. E., & Crocitto, M. M. (2008). Mentoring across global boundaries: An empirical examination of home- and host-country mentors on expatriate career outcomes. *Journal of International Business Studies*, 1310-1326.
- Cendant Mobility. (2004). *Emerging trends in global mobility: Policy and practices survey*. Danbury, CT: Cendant Mobility.
- Church, A. T. (1982). Sojourner adjustment. *Psychological Bulletin*, 540-572.
- CIGNA International Expatriate Benefits, NFTC, and World at Work. (2001). *Expatriate Employee Benefits Survey*. New York, NY: CIGNA International Expatriate Benefits.
- Das, D. K. (2009). *Two faces of globalization: munificent and malevolent*. Northampton, MA: Edward Elgar Publishing, Inc.
- Das, D. K. (2010). Globalisation: past and present. *Economic Affairs*, 66.
- Dell. (2011). *Dell*. Retrieved April 14, 2011, from Dell: <http://www.dell.com/>
- Dischinger, J. (2011, March 1). IBM Expat Conversation. (K. Coleman, Interviewer)
- Dischinger, J. (2011, April 15). IBM Expat Conversation 2. (K. Coleman, Interviewer)
- Douthitt, R. A., Macdonald, M., & Mullis, R. (1991). The relationship between measures of subjectivity and economic well-being: A new look. *Social Indicators Research*, 407-422.
- Eastwood, K., & Renard, M. (2008). Training the trainers: Parlate italiano? An experiential exercise in international human resources. *International Business & Economics Research Journal*, 1-10.
- Fink, G., Meierwert, S., & Rohr, U. (2005). The use of repatriate knowledge in organizations. *Human Resource Planning*, 30-36.
- Forbes.com LLC. (2011). *Forbes*. Retrieved April 14, 2011, from Forbes: www.forbes.com
- Gabe, R. (2011, April 7). VWR Director Conversation. (K. Coleman, Interviewer)
- Gaw, K. F. (2000). Reverse culture shock in students returning from overseas. *International Journal of Intercultural Relations*, 83-104.
- Gaylord, M. (1979). Relocation and the corporate family: Unexplored issues. *Social Work*, 186-191.
- GMAC GRS. (2008). *The 2008 Global Relocation Trends Survey Report*. GMAC Global Relocation Services LLC.
- Grafje, K. (2011, April 11). Director, Compensation. (K. Coleman, Interviewer)
- Grafje, K. (2011, April 12). VWR HR Conversation. (K. Coleman, Interviewer)
- Gregersen, H., & Black, J. (1995). Keeping high performers after international assignments: A key to global executive development. *Journal of International Management*, 3-21.
- Harvard Business School. (2011). *Career Development*. Retrieved 4 14, 2011, from Harvard Business School Alumni: <http://www.alumni.hbs.edu/careers/networking.html>

- Hauser, J. (1998). Making the most of your investment. *HR Focus*.
- Hauser, J. (1999). Managing expatriates' careers. *HR Focus*, 11-12.
- Hays, R. D. (1974). Expatriate selection: Insuring success and avoiding failure. *Journal of International Business*, 25-37.
- Hofstede, G. (2009). *Geert Hofstede Cultural Dimensions*. Retrieved 4 14, 2011, from itim International: <http://www.geert-hofstede.com/>
- IBM. (2011). *IBM*. Retrieved April 14, 2011, from IBM: <http://www.ibm.com/us/en/sandbox/ver1/>
- Jassawalla, A., Asgary, N., & Sashittal, H. (2006). Managing expatriates: The role of mentors. *International Journal of Commerce and Management*, 130-140.
- Jassawalla, A., Connolly, T., & Slojkowski, L. (2004). Issues of effective repatriation: A model and managerial implications. *SAM Advanced Management Journal*.
- Jassawalla, A., Truglia, C., & Garvey, J. (2004). Cross-cultural conflict and expatriate manager adjustment: An exploratory study. *Journal of Management History*.
- Kamoche, K. (1985). Developing managers: The functional, the symbolic, the sacred and the profane. *Organization Studies*, 747-774.
- Klaff, L. (2002). The right way to bring expats home. *Workforce*, 40-44.
- KPMG. (2010). *Global assignment policies and practices*. KPMG International.
- Kram, K. (1985). *Mentoring at work: Developmental relationships in organizational life*. Glenview, IL: Scott, Foresman and Co.
- Littrell, L. N., Salas, E., Hess, K. P., Paley, M., & Riedel, S. (2006). Expatriate preparation: A critical analysis of 25 years of cross-cultural training research. *Human Resource Development Review*, 355-388.
- McCaughey, D., & Bruning, N. (2005). Enhancing opportunities for expatriate job satisfaction: HR strategies for foreign assignment success. *Human Resource Planning*, 21-29.
- Mezias, J. M., & Scandura, T. A. (2005). A needs-driven approach to expatriate adjustment and career development: A multiple mentoring perspective. *Journal of International Business Studies*, 519-538.
- Naumann, E. (1993). Antecedents and consequences of satisfaction and commitment among expatriate managers. *Group Organization Management*, 153-187.
- Netemeyer, R. G., Boles, J. S., & McMurrin, R. (1996). Development and validation of work-family conflict and family-work conflict scales. *Journal of Applied Psychology*, 400-410.
- O'Conner, R. (2002). Plug the expatriate knowledge drain. *HR Magazine*, 101-107.
- Orenstein, K. (2011, March 18). IBM HR Conversation. (K. Coleman, Interviewer)
- Poe, A. (2000). Welcome back. *HR Magazine*, 94-105.
- Premack, S. L., & Wanous, J. P. (1985). A meta-analysis of realistic job preview experiments. *Journal of Applied Psychology*, 706-719.
- PricewaterhouseCoopers. (2007). *10th Annual Global CEO Survey*. PricewaterhouseCoopers.
- PricewaterhouseCoopers. (2011). *14th Annual Global CEO Survey*. PricewaterhouseCoopers.
- Rhoades, L., & Eisenberger, R. (2002). Perceived organizational support: A review of the literature. *Journal of Applied Psychology*, 698-714.
- Richardson, J., McBey, K., & McKenna, S. (2008). Integrating realistic job previews and realistic living conditions previews: Realistic recruitment for internationally mobile knowledge workers. *Personnel Review*.
- Ruben, B. (1976). Assessing communication competence for intercultural adaptation. *Group and Organization Studies*, 334-354.
- Searle, W., & Ward, C. (1990). The prediction of psychological and sociocultural adjustment during cross-cultural transitions. *International Journal of Intercultural Relations*, 449-464.
- Selmer, J., Torbiörn, I., & de Leon, C. (1998). Sequential cross-cultural training for expatriate business managers: Pre-departure and post-arrival. *International Journal of Human Resource Management*, 831-840.
- Shaffer, M. A., Harrison, D. A., & Gilley, K. M. (1999). Dimensions, determinants and differences in the expatriate adjustment process. *Journal of International Business Studies*.
- Shaffer, M. A., Harrison, D. A., Gregersen, H., Black, J. S., & Ferzandi, L. A. (2006). You can take it with you: Individual differences and expatriate effectiveness. *Journal of Applied Psychology*, 109-125.
- Stahl, G. K., Miller, E. L., & Tung, R. L. (2002). Toward the boundaryless career: A closer look at the expatriate career concept and the perceived implications of an international assignment. *Journal of World Business*, 216-227.
- Stuart, K. (1992). Teens play a role in moves overseas. *Personnel Journal*, 71-73.
- Suutari, V., & Burch, D. (2001). The role of on-site training and support in expatriation: Existing and necessary host-company practices. *Career Development International*, 298.

- Templer, K. J., Tay, C., & Chandrasekar, N. A. (2006). Motivational cultural intelligence, realistic job preview, realistic living conditions preview, and cross-cultural adjustment. *Group & Organizational Management*, 154-173.
- Tung, R. (1981). Selecting and training of personnel for overseas assignments. *Columbia Journal of World Business*.
- Tung, R. (1982). Selecting and training procedures of U.S., European, and Japanese multinational corporations. *California Management Review*.
- Van der Zee, K., & Van Oudenhoven, J. (2000). Psychometric qualities of the multicultural personality questionnaire: A multidimensional instrument of multicultural effectiveness. *European Journal of Personality*, 291-309.
- VWR International LLC. (2011). VWR. Retrieved April 14, 2011, from VWR: <https://www.vwrsp.com/>
- Windham International. (1997). *Global relocation trends 1997 survey report*. New York, NY: Windham International.
- Windham International. (1999). *Global relocations trends 1999 survey report*. New York, NY: Windham International.
- Yahoo! (2011). *Yahoo! Finance*. Retrieved April 14, 2011, from Yahoo! Finance: finance.yahoo.com

ACADEMIC VITA of Kenneth H. Coleman

Kenneth H. Coleman
245 S. Atherton Street #103
State College, PA 16801
kennethcpsu@gmail.com

Education: Bachelor of Science in Supply Chain & Information Systems
Bachelor of Science in Psychology, Honors Option
Honors in Supply Chain & Information Systems
Honors in Psychology
Thesis Title: Maximizing Expatriate Performance: A Study Examining the Most Effective Methods to Send Employees Abroad
Thesis Supervisors: Dr. Robert A. Novack and Dr. James L. Farr

Related Experience:

Internship with Kraft Foods Co. (exposure to global supply chain roles)
Summer 2009 and 2010

Studied for one semester in Barcelona, Spain (first-hand experience of the struggles and training methods of sending someone into a new culture)
Spring 2010

Awards:

Winner of the 2009 START Diversity Award Competition within the Smeal College of Business
Runner-up for the 2009 Forum on Black Affairs' Fannie Lou Hamer – W.E.B. DuBois Scholarship Contest
Nominated for the 2009 Jackson Lethbridge Tolerance Award
Academic Excellence Scholarship (2007-2011)
Dean's List (2007-2011)

Activities

Political Action Chair for the Penn State chapter of the National Association for the Advancement of Colored People (NAACP) (2008-2010)
Secretary for the Schreyer Honors College Student Council (2008-2009)
THON Morale Team Member (2008-2011)
Scholar Advancement Team Member (2009-2011)
Scholar Liaison (2009-2011)