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AUTHOR	Beitler, Michael A.; Frady, D. Allen
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ABSTRACT

Expatriate managers, especially United States managers working in foreign countries, experience very high failure rates. Costs of these expatriate management failures are very high for the managers, who report personal relationship problems and a fear of career derailment, and for their companies, in terms of opportunity and hard costs. This four-phase training model for expatriate managers has been proposed: a self awareness phase to provide trainees with insight into their receptiveness and propensity for successful cross-cultural assignments; a general awareness of cultural differences phase to provide insight into how cultures differ on various dimensions; a specific knowledge acquisition phase (area studies, language studies, and host attitude awareness); and a specific skills training phase that emphasizes application and practice of skills necessary to succeed in the foreign culture. A model of expatriate manager assessment and development includes these seven steps: assessment; individualized learning agreement; pre-departure training and orientation; E-support during foreign assignment, a critical step that includes E-learning, E-mentoring, and E-counseling; periodic re-assessment; learning agreement revisions; and ongoing E-support. A comprehensive expatriate support system should include the manager, spouse, dependents, and host-country sponsor, with E-support provided for all four stakeholders. (Contains 20 references.) (YLB)

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E-LEARNING AND E-SUPPORT FOR EXPATRIATE MANAGERS

Michael A. Beitler
D. Allen Frady

THE PROBLEM

Expatriate managers, especially U.S. managers working in foreign countries, experience very high failure rates.

Black and Gregersen (1999) report the following alarming findings:

1. Nearly one-third of U.S. managers sent abroad do not perform up to the expectations of their superiors.
2. Up to 20% of all U.S. managers sent abroad return early because of job dissatisfaction or difficulties in adjusting to a foreign country.
3. One-fourth of U.S. managers completing a foreign assignment left their company within one year after repatriation (often joining a competitor).

Perhaps, what is even more disturbing than Black and Gregersen's findings is the fact that we have known about these appalling failure rates for many years. In January of 1990, a Training & Development Journal article stated, "Up to 40 percent of U.S. expatriate managers fail in their overseas assignments" (Hogan and Goodson, 1990).

In that same article, Hogan and Goodson described how the Japanese had achieved a dramatically better success rate with their expatriate managers. They discussed one survey that stated "86 percent of multinational corporations in Japan had failure rates below 10 percent for their expatriates."

Hogan and Goodson (1990) described the typical Japanese firm's expatriate support program as follows:

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1. One year before managers depart, they devote company time to studying the culture and language of the destination country.
2. In the foreign country, the expatriate managers work with mentors who are responsible directly to the head office for assisting the managers with cultural problems that arise.
3. The first-year performance appraisal form clearly indicates that the expatriate's primary job during year one is to learn about and adjust to the host country.

Hogan and Goodson (1990) recommended the following:

1. Training should aim at developing communication, leadership, conflict management, and other skills that fit the particular culture.
2. Predeparture training should be tailored to the individual manager's needs. A minimum requirement is a conversational knowledge of the host country's language.
3. The expatriate's family should receive predeparture training.
4. Sponsorship (a mentor) should provide ongoing support.

In a study involving survey responses of 72 human resource managers at MNCs, 35% of the HR managers said cultural adaptability was the most important success factor in a foreign assignment (Dallas, 1995).

The Costs of the Problem

The costs of these expatriate management failures are very high for the managers and their companies. Managers report personal relationship problems with family members who move to the foreign country with them, and a sense of "disconnect" with their families and friends in their home countries. Managers also report a fear of career de-railment resulting from foreign assignment failure.

The companies experience very high costs, in terms of opportunity costs and hard costs. Opportunity costs include the loss of future business and reputation in the community. The failure of a U.S. manager enforces the stereotype of the culturally inept American.

Hard costs of these failures for U.S. companies are staggering. One American expatriate manager we interviewed reported receiving a $10,000 per month housing allowance from

her multi-national corporation (MNC) while on a two-year assignment in Tokyo. She personally added a $1,000 per month to the allowance to rent an apartment. Add the cost of several trips home per year, and then multiply that by several hundred expatriate managers and one gets an idea of the hard costs involved.

A Four-Phase Training Model

Researchers (Harrison, 1994; Harris and Moran, 1991) have proposed a four-phase training model for expatriate managers:

1. Self-awareness
2. General awareness of cultural differences
3. Specific knowledge acquisition
4. Specific skills training

Self-directed learning is appropriate in some aspects of these programs; teacher-directed, classroom settings are more appropriate in others.

The self-awareness phase should be designed to provide the trainees with insight into their receptiveness and propensity for successful cross-cultural assignments. There are several psychological instruments available for managers and their family members; including the Cross-Cultural Adaptability Inventory (Kelley & Meyers, 1992) and the Intercultural Sensitivity Inventory (Bhawuk & Brislin, 1992).

While we are mainly concerned in this article with training, this phase also raises some selection issues. After completing several psychological instruments, it may become clear to the manager (or to his/her supervisor) that overseas assignment may not be appropriate.

Jordan and Cartwright (1998) believe successful expatriate managers have the following attributes:

1. Emotional stability
2. Self-confidence

3. Intellectual capacity
4. Openness to new experiences
5. Relational ability
6. Linguistic skill
7. Cultural sensitivity
8. Ability to handle stress

The general awareness of cultural differences phase of training is now supported by an impressive body of literature. Kluckhohn and Strodtbeck (1961), Hofstede (1980, 1993), and Trompenaars (1998) provide insight into how cultures differ on various dimensions.

Kluckhohn and Strodtbeck (1961) describe six different cultural dimensions:

1. How people view humanity (good, evil, mixed)
2. How people see nature (domination, harmony, subjugation)
3. How people approach interpersonal relationships (individualistic, group, hierarchical)
4. How people view activity and achievement (being, controlling, doing)
5. How people view time (past, present, future)
6. How people view space (private, public, mixed)

Hofstede (1980, 1993) reports five dimensions of cultural differences that affect work-related attitudes:

1. Individualism vs. collectivism
2. Power distance
3. Uncertainty avoidance
4. Masculinity vs. femininity
5. Long-term vs. short-term orientation

Trompenaars' (1998) database of 50,000 respondents supports a set of value differences he found in various cultures:

1. Universalism vs. particularism
2. Individualism vs. communitarianism
3. Expressive vs. controlled emotions
4. Personal vs. strictly business relationships
5. Status based on ascription or achievement
6. High vs. low time-consciousness
7. Internal vs. external locus of control

Bennett (1986) believes by educating individuals to recognize their own values, they can better identify contrasts with

other cultures and then apply these insights gained to improving cross-cultural interactions. Harrison (1994) adds, "To appreciate the differences in other cultures, trainees must understand their own culture."

The specific knowledge acquisition phase includes area studies, language studies, and host attitude awareness. Area studies, covering history, political system, economy, demographics, and climate are assumed to increase empathy, which will modify behavior in cross-cultural interactions (Tung, 1981).

Researchers (Copeland & Griggs, 1985; Harris & Moran, 1991) have found knowledge of the host country's language to be essential. Interestingly, an individual's level of confidence and willingness to use the host language is a greater influence on success than his or her actual level of fluency (Mendenhall & Oddou, 1985). Therefore, building the trainee's confidence and willingness is critical.

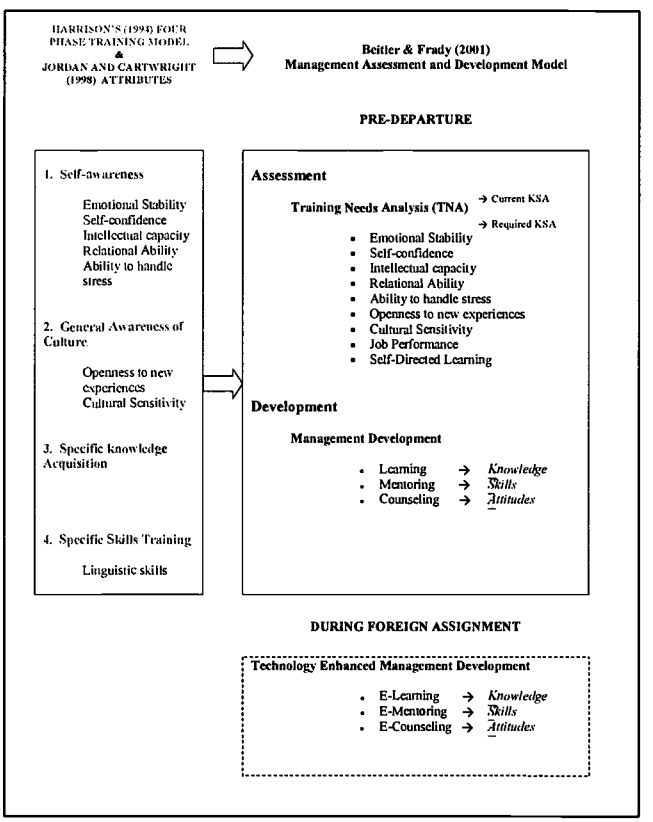
In this phase, it is important for the trainee to become aware of the attitudes he or she will face in the host country. Work-related attitudes such as productivity, dependability, pace, frequency of breaks, meeting interruptions, and deadlines vary greatly from culture to culture. Trainees must also be alerted to possible negative attitudes toward nationality, race, or gender.

The specific skills training phase emphasizes the application and practice of the skills necessary to succeed in the foreign culture. In this phase, "trainees analyze the problem situation, diagnose the underlying cultural issues, and respond accordingly (Harrison, 1994). Case studies, simulations, and behavior modeling allow for the application and practice of previously acquired knowledge.

An effective skills training method is the simulated cocktail party (Earley, 1987). The interactions in this simulation require the use of greetings and introductions, etiquette, and appropriate topics for conversation. Mendenhall and Oddou (1998) believe this type of simulation forces the trainees to deal with emotions resulting from cross-cultural misunderstandings. Obviously, this aspect of learning cannot be adequately addressed in a book.

Harrison (1992) describes the use of behavior modeling as an effective cross-cultural training tool. Managers watch live or videotaped models demonstrating effective behaviors; then the managers rehearse the demonstrated behaviors. Trainers should be available to provide feedback.

THE SOLUTION



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When Harrison's Four Phase Training Model (1994) and Jordan and Cartwright's (1998) Attributes are combined (see the left side of the model above) weaknesses appear in the areas of Specific Knowledge Acquisition and Specific Skills Training.

Our model of Expatriate Manager Assessment and Development builds upon aspects of Harrison's (1994) and Jordan and Cartwright's (1998) work. Our model includes the following steps:

1. Assessment
2. Individualized Learning Agreement (see Beitler, 2000, 1999)
3. Pre-Departure Training/Orientation
4. E-Support During the Foreign Assignment
5. Periodic Re-Assessment
6. Learning Agreement Revisions
7. On-Going E-Support

1. Assessment

Any management development program should begin with assessment. The assessment phase should be especially comprehensive because of the unique KSAs required for foreign assignment. The typical management assessment instruments are helpful, but they should be supplemented with instruments such as the Cross-Cultural Adaptability Instrument (CCAI) and the Self-Directed Learning Readiness Scale (SDLRS).

2. Individualized Learning Agreement

The learning agreement, as detailed in Beitler (2000, 1999), should include the following:

a. What will be learned.
b. How will it be learned.
c. How will the learning be documented.
d. How will the learning be evaluated.

3. Pre-Departure Training/Orientation

At a minimum, this should include general awareness of the culture and basic language skills. It is important to include spouses and dependents, as well as the expatriate managers, in this phase.

4. E-Support During Foreign Assignment

This step is critical in our model. Training and development for the expatriate manager only begins in the pre-departure phase. On-going support is necessary for success. The expatriate manager will need to acquire additional KSAs after arriving in the host country.

In the pre-departure phase, managers can acquire knowledge (K) through classroom learning, skills (S) through daily mentoring, and proper attitudes (A) through face-to-face counseling sessions.

During foreign assignment, classroom learning must become E-learning, daily mentoring must become E-mentoring, and face-to-face counseling must become E-counseling. The technology is now available to support E-learning, E-mentoring, and E-counseling. Today's global organizations must utilize that technology.

5. Periodic Re-Assessment

This is very important for the success of the foreign assignment. The expatriate manager should receive as must feedback as possible. Guidance from a host country supervisor or sponsor would be ideal, but is not always possible. But, peers and subordinates can be surveyed for input.

6. Learning Agreement Revisions

New learning agreements should immediately follow the periodic assessment. Plans to strengthening strengths and ameliorating weaknesses should be clearly written.

7. On-Going E-Support

On-going support in the forms of E-learning, E-mentoring, and E-counseling is an "investment" that will yield substantial returns for the organization. This support should be well-planned and monitored for continuous improvement.

WHO'S INVOLVED

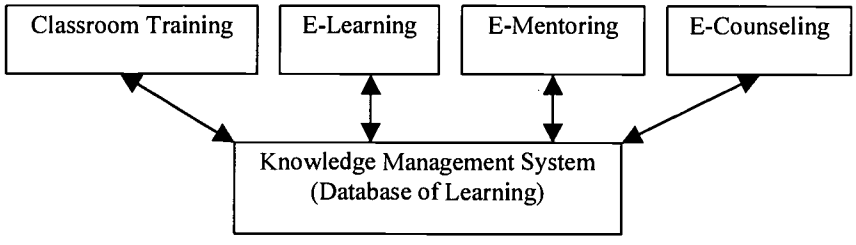
A comprehensive expatriate support system should include all four of the following:

1. Manager
2. Spouse
3. Dependents
4. Host-country sponsor

E-learning, E-mentoring, and E-counseling can be provided for all four stakeholders.

KNOWLEDGE MANAGEMENT (KM)

KM applications (the technical side of organizational learning) should be fully utilized in the expatriate management support system. This technology provides for the "capturing" and dissemination of knowledge to organizational members around the world. On-going, new learning can easily be fed in to the KM system. Each part of the expatriate support system should be linked to the KM system, as illustrated below:



SUMMARY

The current failure rate of expatriate managers is unacceptable. New technology is now available for global organizations to provide expatriate managers with the E-learning and E-support they need to succeed!

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