HRD Strategies for Expatriate Development: Review of Current Strategies and Potentials of Expatriate Mentoring

Eunok Alice Kim
University of Illinois at Urbana-Champaign

Expatriates are critical human resources and means of global organizations. Through review of literature, this paper examines HRD strategies that have been utilized to develop expatriates for international assignments, identifies gaps in current HRD strategies, and investigates unique potentials of expatriate mentoring contributing expatriate development in all three stages of expatriation.

Keywords: International Human Resource Development, Mentoring, Expatriate Development

One of the most influential factors that are shaping the Human Resource Development (HRD) field is globalization. Globalization focuses on integration of business activities on a global basis and leads companies to locate important activities such as production, marketing, and R& D in those countries where opportunities are best (Adler, 2002; Evans, Pucik, & Barsoux,2002).

Expatriation and successfully managing expatriation have been important issues for many multinational corporations (MNCs). Sending home-country personnel to the local subsidiaries has been the main strategy MNCs have adopted to start global business, to transfer the knowledge and culture of the home organizations, and to make a connection between headquarters and local subsidiaries (Black, Gregersen, Mendenhall, & Stroh, 1999; Evans et al., 2002). Expatriation has recently been approached as a long-term global strategy rather than as a means of crisis management. While expatriation has mainly been adopted to solve the urgent challenges in international markets and the problems of subsidiaries on the past, it has recently been refocused on the areas of global leadership and managerial development, as well as organizational learning from international experiences (Adler, 2002).

Problem Statement

One of the challenges that HRD in MNCs faces is the lack of globally effective human resources. The experiences of MNCs and the research have shown that highly effective managers in the home country have not been as effective in international settings. Between 16 and 40 percent of all American expatriates fail to complete their assignment, while the domestic failure rate is only five percent. Even 30 to 50 percent of the American expatriates who do complete their assignments are considered by their companies to be ineffective or only marginally effective (Morris & Robie, 2002).

Thus, it has become imperative among MNCs to develop individuals who can work effectively and efficiently in an international environment. Expatriate development matters to organizations and expatriates. Organizations build their global competencies and strategic advantages in global perspectives through expatriates. Given the importance and high costs of expatriation, it is important what HRD strategies have been utilized and what can be done to help expatriate to develop and succeed in their international assignments.

The purpose of this paper is to identify gaps in the HRD strategies for expatriate training and development, and to discuss how expatriate mentoring could fill the gaps, and to explore future research ideas and directions through examining the literature on HRD strategies for expatriate mentoring. For this purpose, literature of theoretical framework and empirical evidences was reviewed.

This paper is organized into the following three main sections: The first part is an overview of HRD strategies for expatriate T & D. This part examines what have been known as well as unknown. The second part specifically concerns expatriate mentoring as an HRD strategy for expatriates. The literature from the domestic business area is examined as well as studies from international settings. The last part discusses future research directions on the topic of expatriate mentoring as a means of developing expatriates.

Research Questions

The following questions guided the development of the paper:
1) What kinds of HRD strategies have been utilized for the development of expatriates and what are the gaps in those strategies?
2) What are the potentials that expatriate mentoring could contribute to development of expatriates in addition to HRD strategies that have been utilized?
3) What are useful future directions of expatriate mentoring research considering its unique contexts?

Method

Integrative literature review was utilized for the study. Three major business, education and psychology database were searched: ABI INFO, ERIC, and Psyc INFO. Each database was searched with several keywords such as international human resources, expatriates, expatriate development for materials published in the past thirty years. The retrieved materials included journal articles, book sections, and reports. The abstracts of retrieved data were reviewed, and relevant materials to the research questions were selected for detailed review. Bibliographies in the reviewed articles also were looked up. This study is based on review of these available literature and reports. Empirical and theoretical literatures were included in the paper to capture the multi-faceted nature of the topic.

HRD Strategies for Expatriate Training and Development

The HRD strategies for expatriate training and development in the international HRD context is summarized in this section. To date, selection, pre-departure training, and cross-cultural adjustment have been among the most popular issues for the preparation and development of expatriates in international HR (Tung, 2000). Studies on cross-cultural training will be investigated first in this section. Secondly, the research on pre-departure and post-arrival training will be described.

Cross cultural training

The difficulties that expatriates experienced in transplanting many practices abroad raise the question of national culture. Hofstede's (1980) groundbreaking research on cultural differences showed that national culture differences account for managerial styles more than position within the organization, profession, age, or gender. This theory implies that management and business operations are much more shaped by national culture differences even within a MNC; thus it is imperative to take national cultural differences seriously when MNCs expand internationally.

As cultural differences have been addressed as a key dimension of an international assignment, cross-cultural training (CCT) has become the main focus of T & D for expatriates. Cross-cultural training is "those educative processes that are designed to promote intercultural learning, by which the acquisition of behavioral, cognitive and affective competencies is associated with effective interaction across culture" (Landis & Brislin, 1983; Morris & Robie, 2001). CCT has long been advocated as a means of facilitating effective cross-cultural interactions (Black & Mendenhall, 1990). Topics of expatriate training include informational briefings, area studies, cultural assimilators, sensitivity training, field experiences, and language training (Downes, Thomas & Singley, 2002; Tung, 1981).

Black and Mendenhall's (1991) review article on CCT effectiveness is based on 29 empirical studies evaluating the effectiveness of CCT programs. From a review of those studies, three primary dependent factors were commonly used as indicators of training effectiveness: Cross-cultural skill development, Adjustment, and Performance. The researchers made a matrix of those factors and research results, and classified the CCT effects into positive, negative, non-significant, and not addressed. They concluded that in general, CCT is effective in all of those areas.

Morris and Robie's recent meta-analysis on CCT effectiveness (2001) examined 16 empirical studies for expatriate adjustment and 25 studies for expatriate performance. The study adopted more rigorous criteria that solely focused on CCT for expatriates and used a more systematic analysis method, meta-analysis in combining the results of multiple studies. In spite of the larger sample sizes (more than 1,500 for each dependent variable) than in the previous meta-analysis, the results showed that the mean effect sizes were lower: the effect size was $r=.26$ for performance and $r=.13$ for adjustment. These findings indicate that "the effectiveness of CCT is somewhat weaker than expected and can vary widely"(p.203). The researchers concluded that the prescription for CCT should be made cautiously considering moderators such as individual and international contextual differences, and training content and methods.

Pre-departure and post-arrival training

Scholars commonly divide expatriation into the following three stages: pre-expatriation, during expatriation (international assignment), and repatriation stages (Black et al., 1999; Harvey & Wiese, 1998). Pre-departure training is important because individuals make anticipatory adjustments before they actually encounter a new situation. Accurate expectation through proper information and training is known to facilitate the actual adjustment (Black, Mendenhall, & Oddou, 1991). According to a survey, about 62 percent of U.S. corporations provide some type of cross-cultural preparation before sending expatriates and typically that training lasts less than a day (Black et al., 1991). Similarly, Bolino and Feldman(2000) found that over 75 percent of the respondents received less than one day of training before their assignments, and over a third of these individuals received no pre-departure training from a survey of 268 expatriates.

In the research of Shim and Paprock (2002) of 70 American expatriates, a pre-departure training program was evaluated as a less effective factor facilitating adaptation to life in the host country than previous intercultural experience, language competency, personal research about the host culture, training programs, the host friends' help, peer guidance, and communication with other expatriates. This implies that other training and development interventions might be more effective than pre-departure training.

While pre-departure training is important, post-arrival training is suggested as more critical to expatriate productivity. Post-arrival or in-country training has the following advantages. The expatriates themselves are more motivated and have more "baseline experience with the local culture as a foundation for learning deeper cultural values, norms, and ideas" (Black et al., 1999, p.101). The in-country environment makes the training content real and expatriates can immediately test and apply what they learn. Post-arrival training can take advantage of these opportunities after the assignee has been in the country for at least a month, especially after two to six months (Black et al., 1999). While pre-departure training should focus on basic and day-to-day concerns, post-arrival training should include deeper aspects of culture, interaction and communication with local people (Black et al., 1999; Black and Mendenhall, 1990). Similar to the cases of pre-departure training, companies tend not to provide much follow-up training once employees are overseas. Runzheiment's study (1984) showed some statistics about follow-up training: no follow up training at all (49%), follow-up training in language skills only (36%), no training once employees are overseas though assigning the family a "counselor"(12%), and comprehensive training programs (3%) (Mendenhall, Dunbaar, & Oddou, 1987).

Reasons that international firms do not provide training are known: doubts about the effectiveness of such training programs, lack of time between selection and relocation, the perception that overseas assignments do not warrant expenses for training because of their short duration, and no perceived need for training on the part of top management (Mendenhall et al.,1987; Tung, 1991).

In conclusion, surveys have showed many MNCs have not offered as many training and development opportunities for expatriates as scholars call for. Also the majority of training efforts for expatriates have been devoted to the pre-departure stage among the three expatriation phases, while the post-arrival stage is a more critical and appropriate period for training expatriates.

Expatriate Mentoring

While mentoring has been widely researched in the domestic workplace, research attention on mentoring in the international setting has only recently been given in order for MNCs to assist expatriates to succeed in their international assignments (Adler, 2002). While formal training-whether it is pre-departure or CCT- has been a dominant strategy for preparing expatriates, little is known about expatriate mentoring, which often takes the form of an informal development relationship or on-the-job, one-on-one training. Expatriate mentoring has very valuable advantages and potential to fill the gaps CCT or pre-departure training leave out in training and to develop expatriates for the following reasons.

First of all, while formal training is often restricted in duration and conducted in a time-compressed way, mentoring can take place anytime over the three phases of expatriation in the workplace.

Secondly, mentoring is often less expensive than formal courses, can be used in a more cost-effective way, and decreases an employee's need for other forms of training (Harvey & Wiese, 1998; Hegstad, 2002). For these reasons, international non-profit, religious and charitable organizations have used global mentoring for a long time (Clutterbuck, 2001).

Thirdly, mentors are a key source of real-time learning for the employee, and mentoring is an important workplace learning strategy (Ellinger, 2002 in Hansman, 2002; Hegstad, 2002). Expatriates can be active learners and participants in their own adjustment in the expatriation and challenges caused by the international business environment (Feldman & Thomas, 1992). Considering that many organizations still do not equip expatriates with

enough T&D interventions for several reasons, mentoring strategy should be given more attention. In particular, expatriate mentoring would be a very appropriate intervention when expatriates are on international assignments

The mentoring literature is reviewed in two parts in this section. The first one is the literature on mentoring in general and the second is on expatriate mentoring. Considering that expatriate mentoring is in a very infant stage in research, the domestic mentoring literature is expected to provide foundational work in the theories and framework for expatriate mentoring.

Mentoring in the Domestic Setting

The classic definition of mentoring at work can be summarized as an intense one-on one relationship over an extended period of time with a more experienced senior person in the protégé's organization who assists a junior person with the protégé's personal and professional development (Higgins & Kram, 2001; Kram, 1985; Noe, 1988; Wanberg, Welsh, & Hezlett, 2003). A mentoring relationship in organizational settings has been known to have two functions: career functions and psychosocial functions. In her seminal work through in-depth biographical interviews with 18 managers, Kram (1985) found that mentoring provided those two functions. The career functions are those aspects of the mentoring relationships that enhance the protégé's advancement in the organization. Sponsorship, exposure and visibility, coaching, protection, and challenging assignments belong to the career functions. The psychosocial functions increase "an individual's sense of competence, identity, and effectiveness in a professional role" (Kram, 1985, p.32). They include the mentoring functions of role modeling, acceptance and confirmation, counseling, and friendship. Later, research on the dimensions of the mentoring function using the factor- analysis method has agreed on the two functional models. However, whether role modeling belongs to the psychological function or a separate construct showed mixed results in the research (Noe, 1988).

Mentoring in the workplace takes several forms depending on the formality, relationships and number of mentors or protégés, or dependence on technology etc. While the informal mentoring relationship is initiated and built through interpersonal dynamics without any intervention of an organization, formal mentoring is a type of mentoring that is sponsored, organized, or sanctioned by organization. While research has shown that informal mentoring is more effective than formal mentoring (Chao, Walz, & Gardner, 1992), formal mentoring programs are gaining more popularity in organizations. This is because the benefits of mentoring are crucial to employees and organizations, especially developmental interventions for minorities, who are known to have limited access to mentoring otherwise. (Noe, 1988; Noe, Greenberger, & Wang,2002; Ragins & Cotton, 1999).

Whereas the mentoring relationship is typically between a senior person and junior person in an organization, peer or lateral mentoring means when "two individuals of comparable pay, job level, or status enter into a mentoring relationships" (Eby, 1977; Kram & Isabella, 1985). When a mentor and a protégé are from different organizations, the relationship is referred to as external, compared to internal mentoring. Group mentoring or e-mentoring have been emerging as alternative forms of mentoring (Noe et al., 2002).

Expatriate Mentoring

Whereas mentoring has become prevalent in practice and research in the past two decades, there are few mentoring studies in international settings (Feldman & Bolino, 1999; Noe et al., 2002). Mentoring in international setting should be given more attention since organizations increasingly operate on a multinational basis. This section examines the characteristics particularly of expatriate mentoring and an expatriate mentoring model.

Characteristics of expatriate mentoring. Expatriate mentoring can be used for the following four purposes: global integration, local responsiveness strategy, social support mechanism, and developmental purpose. Global integration and local responsiveness are the two main dimensions of international HR strategies, and MNCs needs to achieve and balance both strategies in order to gain comparative advantage (Evans et al., 2002). For global integration, MNCs try to have highly coordinated connections and networks between headquarters and subsidiaries. Expatriation has been one of the most commonly used policies for global integration, and expatriate mentoring that enhance the development of expatriates can improve the expatriates' success and thus, contribute to global integration strategies. For effective localization, expatriates are expected to mentor and coach host-personnel (Potter, 1989). Firms can increase both global integration and local responsiveness through mentoring in international settings.

International settings often bring expatriates extreme stress and anxiety due to cultural distance and the lack of social support that is generally available from family and friend in the home country. Mentoring programs can offer this social support function for expatriates (Downes, Thomas, & Singley, 2002; Feldman & Thomas, 1992; Harvey & Wiese, 1998).

Expatriate mentoring can also be used to develop the expatriate's managerial ability. The ability to develop constructive relationships with host national colleagues is one of the criteria of effective expatriate assignments (Feldman & Thomas, 1992; Mendenhall & Oddous, 1986). Mentoring can develop an expatriate's ability "to direct

a culturally diverse workforce and interact successfully with foreign nations" (Feldman & Thomas, 1992, p.277, Tung, 1988).

In international business settings, mentors can be categorized in two ways. The first one is back-home versus on-site mentors, depending on the geographical distance of the mentors from the protégé's location. The second distinction lies in the nationality difference between mentors and protégés. Mentors in international settings can be the same-nationality as the protégé or host-country persons.

The literature has emphasized the importance of back-home mentors for continuing relationships and connections to the headquarters, and for a smooth repatriation process (Feldman et al., 1999; Harris, 1989; Mendenhall & Oddou, 1986). Having a mentor in the home office is suggested to be beneficial in terms of receiving social support, protecting the expatriate's interests while he/she is overseas, and exploring desirable repatriate assignment (Feldman & Thomas, 1992). For example, at Royal Dutch/Shell where about six percent of the total workforce is on expatriate assignments and where expatriate mentoring has long been a practice, all expatriates have a personnel advisor who acts as a formal mentor. This is an individual who comes from the expatriate's own line of work and is located at headquarters, and who will also host him or her whenever he/she comes back on a trip. The mentor is responsible for planning the expatriate's next assignment or repatriation process (Evans, Pucik, & Barsoux, 2002). The focus of back-home mentoring has largely been on easing returning expatriates' 're-entry' shock, helping repatriates adjust to the internal change in corporate culture and finding repatriates appropriate job assignments upon their return (Feldman & Bolino, 1999).

On-site mentors help the adjustment of expatriates to their new assignments and their socialization in the organizations (Feldman et al., 1999; Oddou, 1991; Tung, 1988). Either other expatriates or host-country personnel can serve as on-site mentors. Black and his colleagues assert that mentors not only play a role in helping expatriates learn their organizational roles, but are also crucial in helping them adjust to the new national cultures (Black, 1992; Black & Gregersen, 1991; Black et al., 1991).

Similarities and differences in nationalities and cultures between mentor and protégés are another important dimension to consider in expatriate mentoring. For example, how pervasive is cross-cultural mentoring among expatriates? Is mentoring perceived as an effective development means in other countries as it is in the U.S.? What are the unique opportunities and challenges in cross-cultural mentoring? These questions could benefit from theories in cross-cultural difference, theories of similarity, and diversity research in the mentoring literature.

In their study of 179 expatriates located in 19 countries, Feldman and Bolino (1999) investigated the extent to which expatriates are likely to receive mentoring from on-site mentors in the host country. They found the cultural aspects of the host country influence the amounts of the expatriate's mentoring as follows: expatriates were more likely to receive mentoring in the host-country of small power distance cultures, in weak uncertainty avoidance cultures, and in individualistic cultures.

In conclusion, although the importance of mentors in expatriate assignments has often been suggested, there are still "gaps in our knowledge about mentoring in an international context" (Feldman & Bolino, 1999 p.55). While the necessity and benefits of expatriate mentoring are frequently discussed in the literature, little research attention has been given to it and little is known about "the types of benefits and barriers that mentors and protégés experience" (Noe, 2002). It is necessary, therefore to examine whether expatriate mentoring is an appropriate and reliable approach for MNCs in achieving strategies of global integration and local responsiveness and in enhancing expatriates' performance and success. More research is needed to understand "the conditions necessary to facilitate expatriate mentoring" and "what kinds of match of the mentor and the protégé may be most beneficial" in expatriate mentoring (Noe, 2002).

Expatriate mentoring models. Harvey and Wiese (1998) proposed an expatriate mentoring model. Compared to other mentoring models in the domestic setting, the characteristics of this model are its alignment with the three expatriation phases and its focus on culture, level of change, and mentors' roles. In each of the three expatriation phases, the model has three levels of main components: national culture, organizational culture, and mentor characteristics. The mix and integration of those three components influence expatriate mentoring in each phase. Downes, Thomas, and Singley (2002) summarized the appropriate mentor and mentor's roles in each expatriation stage from Harvey and Wiese's (1998) expatriate mode as follows.

Harvey and Wiese's model is very helpful in conceptualizing expatriate mentoring in terms of providing expatriation-specific points of consideration such as expatriation phases, national and organizational culture and their level of change. It also specifies the mentor's nationality and the roles to which mentors can contribute to. Though the model provides a conceptual framework to better understand expatriate mentoring in the whole process, it does not explain much about the nature, antecedents, and outcomes in each stage of the expatriate mentoring.

Table 1. *Mentoring of Expatriate*

	Mentor	Mentor's Role
Before Expatriation	Repatriated company managers	Establish a bond by providing information Establish a mechanism for communication Define role of mentor Discuss repatriation
During Expatriation	Continued communication with original mentors or their replacements Host country mentors-either host country nationals or experienced expatriates	Inculcate expatriate in new culture Inculcate expatriate in new organization
Upon Repatriation	Original mentors or their replacements Mentors familiar with the community	Facilitate finding a new position in the organization Provide updates on organizational changes Provide updates on changes in the work/home communities Encourage participation in mentoring program

Downes et al., 2002; Harvey & Wiese, 1998

Conclusions

The researcher sought to understand what HRD strategies have been used for expatriate training and development, and to explore potentials expatriate mentoring could provide through reviewing literature. The findings will be summarized and discussed in this section.

First of all, even though severe indicators of expatriates' poor preparation for international assignments and performance have been reported, many organization have not offered as many T & D opportunities for expatriates as scholars call for. The reason for not providing T& D for expatriates includes doubts about the effectiveness of training program and lack of time between selection and expatriation.

Second, cross-cultural training has been most utilized and researched HRD strategies for expatriates. It is consistent with research findings that show that expatriates are usually selected from highly effective managers and the problem of poor performance is not to the general managerial abilities of expatriates but to poor international adjustment.

Thirdly, pre-departure training strategies have mostly been utilized for expatriates among three distinct stages of expatriation. On the other hand, in-country (during expatriation) and repatriation stages are ignored in practice and research. It is very problematic because: 1) The in-country stage is left out although it provides ample learning opportunities in terms of training readiness and learning time compared to the pre-departure stage. 2) Repatriation causes another back adjustment problems that cause international organizations to lose valuable human resources with international experiences.

The review of literature has also shown that expatriate mentoring might fill the gaps in the lack of training in in-country and repatriataion stages. Some components of mentoring for expatriates such as back-home and on-site mentors and similarities and differences in nationalities and cultures have been identified. It is needed for HRD professionals to provide guidelines that help organizations design, develop, and implement mentoring programs for expatriates. Research in the areas of business, education, and psychology has shown ample evidences of benefit of mentoring in domestic setting. More studies to examine expatriate mentoring cases and its advantages are called for.

Limitations of the Research

There are several limitations associated with this literature review. First of all, there is limitation of the extent of the literature reviewed. Although literature in the last thirty years was searched through the three major database of ABI INFO, ERIC, and Psyc INFO, these databases include articles of limited scope that is more academic than practical in its nature and contains articles written only in English. The limited scope may have excluded some HRD strategies that have been used in practice and in other countries where the primary language is not English.

Secondly, although one of the main focus of the study was to explore potentials of expatriate mentoring, discussion on expatriate mentoring has largely been drawn from mentoring literature in general and its unique characteristics in the international context have not been covered extensively due to the limited literature on expatriate mentoring.

Implications for Future Research and HRD practice on Expatriate Mentoring

Despite the imperative of research in expatriate mentoring, it should be approached with close consideration of the global and expatriation contexts. Rather than asking the exact same research questions addressed in the domestic mentoring literature, researchers might find more appropriate research approaches to the expatriate mentoring. Three potentially beneficial future research directions that may lead to fruitful questions in the expatriate mentoring area are suggested here.

First, alternative forms of mentoring, rather than 'classical' mentoring, are perhaps more applicable lenses for looking at expatriate mentoring. Given the common practice of short-term (usually 2-5 years) expatriation and cross-cultural issues, it might not be likely for expatriates during their international assignments to develop a traditional mentoring relationship that is an intense developmental one-on-one relationship of relatively long duration with a mentor who has superior status in the organization. It is rather likely to be shorter, less intense, and looser than in typical mentoring.

Broader concepts of mentoring such as peer-mentoring, the 'developmental network' approach, co-mentoring, or secondary mentoring forms would be proper frames for studying expatriate mentoring (Higgins & Kram, 2001; Kram & Isabella, 1985). Peer relationships can serve as mentoring alternatives that provide similar functions, with two-way exchange and reciprocity being emphasized rather than one-way help (Kram & Isabella, 1985). 'Developmental network' is based on the assertion that people often receive developmental assistance not from a mentor but from diverse mentor-like people. An expatriate can be provided with mentoring functions from her colleagues or diverse 'developers,' including expatriates working for other organizations in the same host-country, and host-country colleagues from her developmental network.

Secondly, examining formal mentoring programs for expatriates would be very practical and beneficial to international organizations and MNCs. Research has suggested that formal mentoring programs are advantageous to employees and organizations, though they might not be as effective as informal mentoring relationships (Chao et al., 1992; Ragins & Cotton, 1999). Research that studies designing issues and the implementation process of successful formal expatriate training would open a door for an organization to help expatriates adopt mentoring as one of their developmental strategies so as to increase their employees' global management skills and performance. Along with that, training expatriates in mentorship roles would be helpful.

Thirdly, research on cross-cultural issues or the impact of cultural differences on expatriate mentoring needs to be done in order for companies to better understand expatriate mentoring. Feldman and Bolino's (1999) study found that expatriates working in countries with large cultural distances received less mentoring than expatriates in countries with small cultural distances. The study suggested an interesting point that the host-country's culture has an influence on how much mentoring expatriates receive, and expatriate mentoring from the host-nationals is perhaps available in some countries and but not in other countries. Along with that, Noe (2002) mentioned that while having the host-country person as a mentor for an expatriate is intuitive for MNCs, it is likely that both mentor and protégé are expatriates of the same nationality. It is consistent with the theory of similarity or fit in the general mentoring literature that people build mentoring relationships with others similar to themselves (Noe et al., 2002; Wanberg et al., 2003). It would be very interesting to study whether mentoring is universally an appropriate development approach for all expatriates, or just for expatriates and mentors from certain cultures. Differences in benefits and barriers in same-country and cross-national mentoring relationships would be an intriguing research topic. In conclusion, expatriate mentoring has so much potential as an HRD strategy for expatriate development. In particular, mentoring during expatriation/ in the host-country might fill the gaps that current cross-cultural training does not fill when expatriate training and when development are left to the expatriates' personal efforts.

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