Crossing Cultures: A Qualitative Study of Expatriate Experiences with Mentors during International Assignments

A DISSERTATION
SUBMITTED TO THE FACULTY OF THE GRADUATE SCHOOL
OF THE UNIVERSITY OF MINNESOTA
BY

Diana C. Cooper

IN PARTIAL FULFILLMENT OF THE REQUIREMENTS
FOR THE DEGREE OF
DOCTOR OF PHILOSOPHY

Advisor: Rosemarie Park, Ed.D.

May 2011

Acknowledgements

Learning and knowledge generation does not take place in a vacuum. My interactions with professors, doctoral peers and professional colleagues over the years laid the foundation for my academic, personal and intellectual growth leading up to and throughout my doctoral program culminating in this dissertation.

There are many people, near and far, who have freely shared their knowledge and wisdom contributing to this doctoral study. First among them is my advisor, Rosemarie Park, Ed. D. who has kindly supported my passion for studying the expatriate experience while challenging my ideas, interpretations and conclusions to produce meaningful academic work. I am grateful for the engaging conversations and professional guidance that she has afforded me. Dr. Gerald Fry and Dr. Jean King introduced me to qualitative research, and Cynthia Peden-McAlpine, Ph.D., RN, guided the depth of my understanding of the methodology used in this study. I will cherish memories of many rich discussions shared at Bordertown with Dr. Fry and at Kafe 421 with Dr. Park. Our meetings propelled my doctoral work to completion without feeling a hint of drudgery but with continual enthusiasm for the field of human resource development and cross-cultural investigations.

I am grateful to each of my committee members for contributing in no small way to the quality of my education. Dr. Alexandre Ardichvili and Dr. R. Michael Paige served on my committee, providing encouragement and insightful comments during my coursework, preliminary examinations, and proposal review process. Their expertise in cross-cultural leadership fueled my interests in my research area. Dr. James Brown served as my committee chair. Dr. Judith Lambrecht, my original advisor, supported and guided me through the hoops of the doctoral program up to my proposal review. She was my mentor for my preliminary examinations, quantitative scholarship, and classroom instruction. I appreciate the guidance she offered in her role as Director of Undergraduates Studies while I instructed Business and Marketing Education undergraduate students. Professor Ross Azevedo, has been a sounding board and mentor as well. Professor Jean King, Director of Graduate Studies, was my first professor at the University, offering her continual support and perspective.

My earliest mentors are scholars from my MBA program at University of California, Irvine, who have supported me professionally for many years. Some were classmates who started their doctoral coursework with me in my Master's program in the mid 1980s. All of them have advanced the development and study of organizational development in an international context and took the time to consult with me on my doctoral progress while sharing their insights on international OD: Jone Pearce, Ph.D., Lyman Porter, Ph.D., P. Christopher Early, Ph.D., Judy B. Rosener, Ph.D., Gregory Stephens, Ph.D.,

For Hailey and Christopher

It's a very fine country on the whole—finer perhaps than what we give it credit for on the other side. There are several improvements I should like to see introduced; but the necessity of them does not seem to be generally felt as yet. When the necessity of a thing is generally felt they usually manage to accomplish it; but they seem to feel pretty comfortable about waiting till then. I certainly feel more at home among them that I expected to when I first came over; I suppose it's because I've had a considerable degree of success. When you're successful you naturally feel more at home.

Henry James, 1881, *The Portrait of a Lady*

Abstract

In response to the changing global business environment and to contribute to scholarly work in the areas of expatriate adjustment, mentoring, and organization and employee development, this study explores ways expatriates experience mentoring and social support while working for multinational enterprises in different cultural contexts. Extant research on cultural dimensions, leadership development, and international assignees indicates that cultural factors affect work behavior and, thus, organization performance. In the wake of conflicting findings from studies on expatriates with mentors, hermeneutic inquiry was used to interpret narratives collected from thirteen international assignees of four nationalities to gain new knowledge about mentors in an international context.

The findings indicate that the construct of mentors is defined by the cultural background of the mentor and protégé, calling into question "traditional measures" (Mezias & Scandura, 2005) of mentoring developed in the US scholarly community to assess mentor outcomes. The expatriates in this study showed an eagerness to learn and sensitivity to cultural differences, evolving into mentor roles themselves, guiding host country colleagues and home country leaders to find intercultural solutions to accomplish the organizational development goals. Although the integration of expatriate knowledge gained on overseas operations is at the core of leadership development lessons for those who aspire to roles as future global managers in transnational organizations (Adler, 2008; Bartlett & Ghoshal, 2003; Dalton, 1998; Harvey et al., 1999; Kanter, 1995) the majority of organizations represented in this study failed to go "beyond skill formation and

competence creation, to embrace the diffusion and transmission of knowledge across

borders and cultures" (Kamoche, 2000, p.769). These findings from the rich description

of the expatriate experience reveal new knowledge, challenges and opportunities for

study of organizations striving to build talent suitable for transnational leadership

positions.

Table of Contents

List of Tables

Acronyms and Abbreviations

HCN   Host Country National

HRD   Human Resource Development

MNC   Multinational Corporation

MNE   Multinational Enterprise

OD   Organization Development

PCN   Parent Country National

TCN   Third Country National

Chapter 1

Introduction

...in the volatile world of transnational corporations, there is no such thing as a

universal global manager. Rather, there are three groups of specialists: business

managers, country managers, and functional managers….And there are

executives….leaders who can manage the complex interactions between the three

- and can identify and develop the talented executives a successful transnational

requires (Bartlett & Ghoshal, 2003).

The professional development of expatriate workers[1] has become increasingly

important to transnational organizations over the past few decades (for e.g., Adler, 2008;

Bartlett & Ghoshal, 2003; Javidan & House, 2001; Mendenhall, 2006; Mezias &

Scandura, 2005; Tung, 1987). Multinational organizations send their most talented

employees on international assignments to implement organizational culture change,

knowledge transfer and control systems overseas (Crocitto et al., 2005; Feldman &

Thomas, 1992; Kamoche, 2000). International work assignments have steadily increased

in the last half of the 20th Century (Black & Gregerson, 1997), with expatriates often

being put on the "fast track" for career advancement to become "global leaders" (Dalton,

1998; Feldman & Bolino, 1999). Multinational enterprises (MNEs) usually deploy

expatriates overseas on short notice, precluding expatriates from receiving pre-departure

training or the mentoring they need to adequately prepare for the work and culture shock

---

[1] Expatriate is an employee sent on an extended work assignment in another country.

ahead (Borstoff et al., 1997; Thomas & Inkson, 2003).   Once they arrive in the host

country of their assignment, expatriates are confronted with the "greatest number and

kind of professional and personal challenges" of their career (Crocitto et. al., 2005, p.

528), adding to the heightened level of uncertainty and stress in today's rapidly changing

business environment.

Although researchers report benefits of cultural assimilation training for

expatriate workers (for e.g., Black & Mendenhall, 1990; Earley, 1987; Tung 1981, 1998)

and theorize about the positive outcomes of mentoring for expatriates (Harvey, 1999;

Mezias & Scandura, 2005), in practice, lack of coaching on cultural differences and

limited attention to career development needs during expatriate assignments leaves

international assignees to struggle during their transition to the host country, scramble to

get up to speed in the new work environment, and flounder in their careers upon

repatriation (for e.g., Black & Gregersen, 1991; Caligiuri, 2000; Carraher et al., 2005;

Shay & Baack, 2002; Tung, 1981). As a result, there is a growing body of literature

exploring the role of mentors, formal and informal, in supporting the critical phases and

factors of expatriate socialization, adjustment and career development while working in

another culture (Chao, 1992; Harvey et al., 1999; Feldman & Bolino, 1999; Johnson et

al., 2003; Mezias & Scandura, 2005; Ragins et al., 2000; Sanchez et al., 2000; Shaffer et

al., 1999). The purpose of this study is to expand upon the extant research on mentors by

interpreting expatriate narrative reflections about their varied experiences with mentors

and social contacts in workplace socialization, professional development, and cultural

learning during their international assignments. This research will provide leaders of

transnational organizations with insight into professional development of future leaders and support in their role in global organization development.

The Background of the Problem

Expatriate workers play a complex and vital leadership role in transnational organizational development. On international assignments, while tackling their mission as change agents, expatriates face distinct challenges ranging from socialization to their new work environment in the host country to concern over career path opportunities upon repatriation, meanwhile, struggling to understand regional cultural differences and the influence of local norms on leadership, teamwork and business processes encountered in their daily work (Adler, 2008; Brett, Befar, & Kern, 2006; Begley & Boyd, 2003; Caligiuri, 1999; Earley, 1987; Hofstede, 1999; 2005; Gomez, 2003; Javidan & House, 2001; Javidan et al., 2002; Marquardt et al., 2004; Osman-Gani & Zidan, 2001; Ramamoorthy & Carroll, 1998; Woodall, 2005; Thomas, 2004). Multinational corporations select expatriates primarily based on their technical and business expertise rather than their international experience, interpersonal skills, and cultural sensitivity (Bennett, 2004; Crocitto, 2005; Oddou, 2002; Tung, 1987). This confluence of challenges puts the international assignee in a position prone to making embarrassing mistakes in interactions with host country colleagues, damaging relationships with local managers, co-workers and business partners at a high personal and professional cost to both the employee and the organization (Adler, 2008; Shaffer, Harrison, & Gilley, 1999; Tung, 1998). Thus, multinational companies are faced with low rates of expatriate project completion and retention upon return from an overseas assignment (Black et al.,

1991; Carraher, Sullivan, & Crocitto, 2008; Mezias & Scandura, 2005).

The Imperative for Cultural Awareness of Transnational Leaders

The development of culturally competent human resources at all levels of the organization has become a strategic imperative for multinational corporations (Earley & Mosakowski, 2004). Yet, multinational enterprise (MNE) management in the home office frequently ask expatriates "to do things that are acceptable in the home culture but not the host culture" (Osland, 1995, p. 50) during their international assignments (Begley & Boyd, 2003). It has been asserted that there are few experienced expatriates available to ask for guidance with work decisions and relationships to accomplish business objectives in a way that is acceptable in specific regions (Begley & Boyd, 2003; Dalton, 1998). Leadership skills in the international context take years to develop and preferred leadership styles vary across cultures (House & Javidan, 2001; Mendenhall, 2006).

Expatriates are often high potential employees or experts in their field sent on high profile assignments requiring successful adaptation to another culture in order to perform their new job and fulfill the succession plan of the organization (Oddou, 2002). They face the paradox of executing the directives of the company leadership within the parameters of the local laws, organization policies, and economic environment, producing conflict when standard home office procedures simply do not work overseas. The expatriate's ability to recognize differing local, "culture specific" values requires an awareness of their own engrained cultural values and business norms in contrast to their host country culture's beliefs and customs (Bennett, 1995). The ability to adapt one's behavior to work in different cultural contexts has been labeled "cultural intelligence"

(Thomas, 2002) and has implications for mentors coaching future transnational leaders on their "mindfulness" of cultural sensitivity in international work.

The Organizational Cost of Failed Expatriate Assignments

Research has shown that expatriate workers often lack the necessary cultural awareness and realistic job previews for their assignments, contributing to the high failure rate of expatriate assignments (Caligiuri 2003; Early & Mosakowski, 2004; Tung, 1998). Failure is defined as the expatriate not completing the assigned work and returning to the home country prior to the agreed upon international assignment duration. US multinational enterprises (MNE's) report a 20 to 30 percent failure rate of US managers selected for an international assignment (Black, et al., 1991). Developing knowledge, skills, and attitudes that enable an employee to discern different cultural perceptions and behaviors to adapt to social and work situations in various cultural settings can significantly affect outcomes of international and domestic business operations (Black, Morrison, & Gregersen, 1999; Mendenhall, 2006). Personal qualities that aid in intercultural adaptation would include: tolerance for ambiguity, behavioral flexibility, being nonjudgmental, cultural empathy, openness to new experiences, self-efficacy, and strong interpersonal skills (Caligiuri, 2000; Ronen, 1989; Vroom, 1969) to name a few. These traits are rarely assessed during the expatriate selection process (Caligiuri, 2000; Caligiuri & Hippler, 2006), so expatriates often enter a challenging phase of their career without a development plan (Feldman & Thomas, 1992).

The intercultural adaptation process is an on-going challenge confronting managers in transnational corporations. Productivity suffers when employees from

diverse cultural backgrounds and management styles encounter conflicts produced by differing norms, languages, hierarchical relationships, and styles of communication among employees (Brett et al., 2006). Thus workers' ability to adapt to other cultures is essential when they work in the multicultural teams common in conducting business today (Brett et al., 2006; Vodosek, 2005). The compelling need for cultural awareness has escalated in the recent decade, with the emergence of the BRIC countries (Brazil, Russia, India and China) to become significant players in the world economy (Carnegie Report, 2009; International Monetary Fund, 2010).

Training and Development Needs of the International Assignee

Specific cultural training has been shown to prepare employees for the adaptation required to live in another country but studies indicate that few expatriates receive this training prior to their international assignment even when it is available (Caligiuri, 1999, 2001a, 2001b, 2001, 2003; Early, 1987, 2003; Tung, 1987, 1998). According to Windham International and National Foreign Trade Council's survey (1998), 70% of the 177 multinational corporations surveyed invest in at least one day of training and development of expatriates to introduce employees to basic cultural differences before they leave their native country. Yet research indicates that these statistics on availability of even limited training do not reflect actual training delivered to expatriates (Mezias & Scandura, 2005). The expatriate deployment typically occurs too quickly to schedule training prior to overseas departure, and, when there is time for the training, it is inadequate or irrelevant to the specific host country or work assignment (for e.g. Jassawalla et al., 2004).

Absent education or coaching on cultural differences, international assignees are likely to have insufficient or inaccurate information about the values and customs of people from other cultures to make the transition to work and life in another country. The worker who has not learned about the range of cultural dimensions runs the risk of developing stereotypes to deal with cognitively unfamiliar worldviews and behaviors of diverse co-workers and clients encountered in different countries (Caligiuri et al., 2001; Thomas, 2002). Relying on stereotypes on an international assignment proves to be an "ineffective, and harmful guide" to cross-cultural working relationships (Adler, 1986). Researchers have developed several frameworks for dimensions of culture to aid in understanding national or regional behavioral tendencies and social norms, thus offering an avenue for expatriates to develop cultural awareness and potentially reduce committing cultural *faux pas*, as will be discussed in the literature review following in chapter two (Trompenaars & Hampden-Turner, 1998; Hofstede, 1980; Javidan & House, 2001; Kluckholn & Strodtbeck, 1961).

The high stakes of expatriate assignments are incentive for organization development (OD) professionals and researchers to seek development interventions to smooth expatriate adjustment and enhance leadership development of international assignees. Although intercultural preparation and job orientation prior to deployment on expatriate assignment is "quite helpful, it doesn't appear to be the distinctive factor separating firms that have extremely successful expatriate programs from those that do not; however, the reasons for this are not yet clear" (Oddou, 2003, p. 308). Thus mentoring has recently been the focus of research as mentors offer a means to shape the

knowledge, skills and attitudes specific to expatriate needs (Harvey et al., 1999; Mezias & Scandura, 2005). The theoretical underpinnings of this study will explore the need for a deeper understanding of the role of mentors for international assignees.

The Theoretical Context of the Problem

Mentoring presents one potentially viable intervention to ameliorate expatriate challenges and improve international organization development. Until the last decade, mentor theory focused primarily on the quality of the mentoring relationships and effects in the domestic operation (Ragins, Cotton, & Miller, 2000). Kram (1985) defined mentors as individuals with experience and knowledge who are committed to providing career support and advancement to their protégés. Potential benefits of mentoring include worker satisfaction, productivity, organization commitment, and reduced intent to leave the company (Amba-Rao, 2000; Harvey, 1999; Feldman & Bolino, 1999; Kram, 1985). Mentor theory suggests that mentoring results in positive job and career perceptions of the protégé regarding job attributes such as satisfaction with opportunities for promotion and higher salaries than unmentored peers (Ragins, Cotton, & Miller, 2000). Mentors engage in sponsoring, coaching, counseling and advocacy for protégés with less experience with a profession, culture, or specific work tasks (Harvey & Wiese, 1998).

Previous research indicates that mentoring relationships in the international context are under-examined (Mezias & Scandura, 2005) and provide inconsistent findings (Carraher, Sullivan, & Crocitto, 2008; Feldman & Thomas, 1992; Feldman & Bolino, 1999; Johnson et al., 2003). According to Jassawalla et al. (2006), a major

obstacle in enlisting mentors for expatriate career development is that MNEs "largely failed to define mentors as a key managerial function, and failed to utilize the concept to its potential" (p. 131). Divergent findings regarding job satisfaction and organizational commitment among mentored expatriates (Carraher et al., 2008; Feldman & Bolino, 1999) may be specific to corporate culture, factors associated with the countries of the assignment or individual expat differences in specific studies. Shaffer et al. (1999) tested multiple hypotheses about adjustment to the expatriate job and non-work environment, measuring the effects of language and hierarchy in expatriate adjustment. In this extensive study, surveying 452 expatriates from a US company, higher level expatriates with prior expatriate experience tended to have difficulty adapting on assignment. Assignees with language proficiency experienced more stress, except third country nationals, who seemed to adapt better than expatriates from the US. Findings concluded that role clarity and decision-making authority contribute to expatriate adaptation. This study illustrates the wide range of factors involved in expatriate research.

The Theory of Multiple Mentors

Adelman (1988 in Johnson et al., 2003) asserts that expatriates receive support from a variety of sources, pointing out that communication with fellow expatriates for social support is critical to processing feelings of uncertainty and navigating the intricacies of a new culture. Johnson et al. (2003) and Caliguiri and Lazarova (2001) found that depth and breadth of relationships with other expatriates and host country nationals (co-workers and town locals) aid in degree of adjustment, influencing the ability of expatriates to effectively perform their duties in a cross-cultural setting.

Crocitto et al., (2005) theorized that mentoring relationships reinforce expatriate efforts to build social capital and develop the host country talent, contributing to organizational knowledge transfer while field research has shown this knowledge transfer in practice often is a low priority for organizations (Dalton, 1998).

Mezias and Scandura (2005) proposed a theory that multiple, formally assigned mentors in the home and host country could best provide support for the multifaceted professional development needs of international assignees. Building on mentoring literature in the domestic arena, potential areas for mentors to aid protégé career development are: interpersonal and communication skills (such as cross-cultural skills, conflict management, listening skills, and presentations), leadership skills (such as delegating and motivating others), cognitive skills, (such as prioritizing, decision-making and strategic thinking), and personal management (time management, anger management, and work-life balance) (Peterson, 2000). Furthermore, based on the theory of "met expectations," a mentor could provide a realistic job preview, assist in the decision to embark upon an overseas assignment (Harvey et al., 1999), and offer support as expatriates undergo socialization into the new job and work group on international assignment (Caligiuri & Lazarova, 2001).

Cultural Intelligence and Expatriate Experience Helps Adjustment

Coaching expatriate workers presents a unique opportunity for mentors with knowledge of cultural, legal, and economic differences in the host country critical to success on an international assignment (Harvey et al., 1999). Research findings on international assignees indicate there are three main aspects to the adjustment process:

psychological adjustment, interaction adjustment (with social contacts in the host country), and work adjustment (Black et al., 1991). The cultural aspect of the international assignment permeates each aspect of the adjustment process and is referred to as acculturation or intercultural adaptation. Research on cultural adaptation has shown that managers who are effective in running domestic operations do not always perform so well in the international context (Osman-Gani & Zidan, 2001). While investigating this phenomenon, several researchers have developed a construct of "cultural intelligence," defined as a person's conscious motivation to understand one's own engrained cultural values and norms in contrast to other beliefs and customs, and adjust behavior to an increased "fit" with new cultural norms (Early & Ang, 2003; Thomas, 2002). Inherent in cultural intelligence is the "mindfulness" to acknowledge the legitimacy of other cultures and value systems around the world (Hofstede, 1980; House el al., 2002). The literature suggests that expatriate success is influenced by their cultural intelligence (Earley et al., 2003; Thomas, 2002; Black et al., 1999), self-efficacy (Caligiuri, 2000; Vroom, 1976), self-perception (Bem, 1972), and awareness of different cultural dimensions (Bond, 1988; Hofstede, 1980; Hall, 1977; Den Hartog et al., 1999; House et al., 2002; 2004; Triandis, 1995; Tung, 1987, 1998). Traditional training in developing these skills and abilities is supported by social learning theory (Bandura, 1986), often including interactive training, such as role-plays of different scenarios, which facilitates learning to behave appropriately in another culture.

Based on the intercultural context of expatriate work, expatriate mentors must have qualifications that go beyond work experience and business expertise to guide the

career development of the international assignee. Expatriate mentors have the added responsibility of understanding and demonstrating an appreciation for other worldviews and specifically adapting to the host country of assignment (Harvey et al., 1999). Experience and knowledge with a host country culture enables mentors to coach expatriates in the nuances of culture while cautioning against stereotyping or over generalizing behavior and values to apply to all individuals of a given nationality (Hofstede, 1991; Triandis, 1989).

Research dealing with cultural intricacies of international business and organizational change lends itself to the "rich, thick contextual description of culture" as it affects people in organizations (Von Glinow, Drost, & Teagarden, 2002). Thus, an interpretive methodology is appropriate to research questions about the expatriate experience with mentors while overseas.

The Need for the Study

Multinational enterprises need to develop leaders to manage global business operations (Bartlett & Ghoshal, 2002; Dalton, 1998; House & Javidan, 2001; Mendenhall, 2006). Expatriate employees are relied upon to perform high profile projects, often on the fast track to move into senior management positions (Black, Mendenhall, & Oddou, 1990). Developing these professionals to become transnational managers is increasingly a strategic organizational initiative but the majority of expatriates do not receive formal training prior to or sufficient support during their international assignment (Early & Mosakowski, 2004). The expatriate literature shows that, without appropriate training and development, expatriates are inclined to experience

negative professional outcomes, producing adverse consequences for their organization (Adler, 2008; Earley et al., 2003; Jassawalla et al., 2004; Thomas, 2002; Tung, 1998). Meanwhile, the body of scholarly work on mentoring has shown positive outcomes for career development in domestic operations (Kram, 1985; Ragins et al., 2000). So scholars theorize that implementing the US concept of mentoring for expatriates could assist them in the cultural adaptation and work socialization necessary for success on international assignments (Harvey et al., 1999; Mezias & Scandura, 2005). Expatriate mentoring is under researched and the extant research has produced inconclusive findings, thus deserving further study (Carraher et al., 2008; Shaffer et al., 1999). A qualitative study will produce thick description to gain a deeper understanding about how expatriates experience mentoring in an international context.

The Purpose of the Study

The purpose of this study is to examine and find deeper understanding of the experience of expatriates with their formal and informal mentors including social ties made on international assignment. Up until now, the extant literature has taken the domestic mentoring construct, indicators, and outcomes, developed in primarily US organization studies, and applied them to the realm of expatriate development. The current study enlists expatriates to share descriptions of their personal and professional development during an international assignment, and interprets these experiences with mentors in the intercultural context. Findings from this study will contribute to the body of knowledge on international assignees, transnational leadership development, and organization development theory and practice.

The Research Questions

This study aims to interpret the expatriate experience with mentors on international assignment for a multinational enterprise. The following research questions frame this hermeneutic study:

1. How do expatriate workers experience mentoring during an international assignment for a multinational organization?

2. What resources do expatriates seek out and/or rely on to support their professional development and adjustment to life in another culture?

The Methodology

Expatriate research, and specifically the expatriate mentoring process, requires analysis of the subtleties of human interaction. Expatriate workers may view the world through different cultural lenses than their host country co-workers and communicate across long distances and national boundaries to potential mentors in the home office, while working on high visibility projects in a multicultural context. Taking into account the complexity involved in intercultural adjustment and organizational responsibilities for the international assignee, investigating expatriate experiences with mentors lends itself to qualitative methods, "to hone in on the right issues and do it in a way to add knowledge to our field" (VonGlinow, Drost, & Teagarden, 2002). The research questions elicited an understanding of how expatriates engage with mentors and what kind of information, relationships, and behaviors contribute to expatriate development and success in an intercultural context (van Manen, 2007).

A hermeneutic methodology was employed to interpret the narrative data collected through first-hand accounts from expatriates who experienced the phenomenon of mentoring on international assignments (Eberhart & Pieper, 1994). In this study, I conducted interviews with thirteen expatriates and interpreted the transcribed narratives to elicit themes relevant to mentoring and development of international assignees as they adapted to their new work role and host country. Lincoln (1990) asserts that authenticity of findings from qualitative research often "express multiple, socially constructed, and often conflicting realities" from inquiries when individual perspectives and cultural differences are present in the field of inquiry. These fundamental assumptions inherent in the research questions provide the rationale for using interpretive methodology for the study. The analysis of interview texts revealed the three major themes in this study. The findings show variations in expatriate experiences reflecting both the uniqueness of each expatriate assignment as well as individual differences of expatriates, while showing the commonalities to the collective expatriate experience, providing a insight into the meaning of mentors in the intercultural contexts of international assignments.

The Significance of the Study

In this era of globalization, Bartlett and Ghoshal (2003) propose a shift in the conventional notion of the "global manager." They argue that a true "transnational" organization "integrates assets, resources, and diverse people in operating units around the world" and relies on, not one, but "three groups of specialists: business managers, country managers, and functional managers…and…leaders who can manage the complex interactions between the three - and can identify and develop the talented executives a

successful transnational requires" (Bartlett & Ghoshal, 2003, p. 102). According to Shay and Baack (2004) organizations with CEOs with international experience perform better, and these CEOs receive higher compensation for their success at the helm of their organizations. Research focusing on the development of the requisite knowledge, skills, and attitudes for transnational leaders and organization development is evolving with changes in the global economy. Expatriates gain exposure to a complex network of systems and cultures preparing them for careers with transnational organizations. Thus, this study seeks to contribute to the body of literature on expatriate, leadership and organization development by developing a deeper understanding of mentors in expatriate career development, as expatriates prepare to fill management roles in the new transnational organization (Bartlett & Ghoshal, 2003).

The Qualifications of the Researcher

This dissertation builds on earlier research from a pilot study conducted while completing my doctoral coursework, *Expatriates as Cross-Cultural Bridge Builders: An Ethnographic Study,* presented as a working paper at the 10th International Conference of Human Resource Development Across Europe, 2009 (Cooper, unpublished manuscript, 2008). I interviewed eleven expatriate workers and content analyzed and interpreted the narrative data in spring of 2008. The inspiration for this line of inquiry was precipitated by living in Europe as an undergraduate student in Italy and England, working on intercultural teams early in my career as a systems consultant, and bringing MBA students on international seminars in Belgium and China while managing leadership development programs at University of California, Irvine. These experiences sparked my

skepticism about whether management education was adequately addressing the cultural component of leadership development and teambuilding training to prepare workers for an increasingly intercultural business environment. Through teaching a course on Diversity and Organizational Change for five years at University of Minnesota, I learned from cases in the literature, guest speakers, and students' experiences, that, indeed, US companies often were muddling through managing intercultural teams and global operations without the preparation and awareness to adapt to cultural differences. This study has provided a deeper understanding and validation of the importance of cultural understanding among businesspeople as they engage in international projects for multinational companies.

Overview

In the following chapter, a review of the literature will include conceptual and theoretical research on dimensions of culture, international assignments, and mentoring in organizations. The body of research on the construct of culture, dimensions of culture, and the geographic regions associated with different cultural dimensions provides a framework for understanding the real significance of culture for international assignees. The literature illuminates the relevance of cultural differences in the workplace and the corresponding potential challenges presented by transition to work in another culture. Research on international assignees examines factors influencing pitfalls and success of expatriate workers. The conceptual and theoretical background of mentoring in a domestic work context will be reviewed as well as preliminary research on expatriate mentoring to support adjustment to work and life in another country.

Chapter three provides an explanation of hermeneutics as the appropriate methodology used in the study. Implementation of research methods in sample selection, developing interview questions, content coding, and interpreting narratives to reach findings consistent with qualitative epistemology are discussed.

Chapter four contains the findings from the interpretive analysis of thirteen expatriate interview narratives conducted in 2009-2010 representing international assignees from eight companies. The nationalities of the participants are: India (3), United States (8), United Kingdom (1), and France (1). The host countries of assignment included China, France, India, Japan, US, UK, and Venezuela.

Chapter five discusses the findings of the study. The themes which emerged from the analysis are compared to the findings of the extant literature.

The conclusion of the study is presented in chapter six. In which I highlight the salient findings from this study for the field of organization development as well as the limitations of the study, recommendations for future research, and the reflections of the research process.

Definition of Terms

The following terms are used frequently in research on expatriates, mentoring, and cultural matters in business. To ensure a shared understanding of the meaning of these terms, the following definitions were selected as appropriate in the context of this research project.

Culture. Culture is defined as shared values, attitudes, beliefs, and norms developed over time in relationship to a group's environment (Hofstede, 1999; House & Javidan, 2001).

Mentoring. The construct of mentoring has developed over the past thirty years of research. The most concise definition of mentoring in organizations is found in Ragins (1997):

> Traditionally, mentors are defined as individuals with advanced experience and knowledge who are committed to providing upward mobility and support to their protégés' careers (Hunt & Michael, 1983; Kram, 1985). According to Kram (1985), mentors provide two primary types of functions or behavioral roles. First, they provide career development behaviors, which involve coaching, sponsoring advancement, providing challenging assignments, protecting protégés from adverse forces, and fostering positive visibility. Second, mentors provide psychosocial roles, which include such functions as personal support, friendship, acceptance, counseling, and role modeling. Scandura (1992) found role modeling to represent a third factor that is distinct from psychosocial support.   Mentoring is not an all-or-nothing relationship. Mentors may provide some or all of these roles. (pp. 484-485).

Research has indicated that various factors affect the quality and outcomes of the mentoring relationship, which will be discussed in the review of the literature.

Coaching. For the purposes of this study, coaching refers to as an informal component of mentoring as specified in the mentoring literature. It is not to be confused

with formal coaching, which addresses specific goals for professional development in a one-on-one relationship between a certified personal coach and a manager.

Cultural Distance. The term cultural distance was first introduced by Church (1982), who identified that the difficulty of expatriate adjustment to work in the cultures of some countries is more difficult than others. Black et al. (1990) referred to this phenomenon as cultural distance and noted that "empirical studies have generally supported" the view that the more culturally distant or different a host culture is from a person's own, the more difficult to adjust to life and work on international assignment (p. 295). Mendenhall and Oddou (1985) reached the same conclusion calling the phenomenon "cultural toughness." Cultural novelty "has its largest impact on expatriates during the first two years of their assignments; after that, the impact of cultural novelty diminishes somewhat" (Torbiorn, 1982 in Black et al., 1990). Transnational Corporations. International business operations are often referred to as multinational corporations (MNCs) and "global" enterprises. To be more precise, Bartlett and Ghoshal (1992 reprinted 2003) argued that the complexity of organizations in recent decades called for a new definition of enterprises operating across national borders: "This kind of organization characterizes a *transnational* rather than an old-line multinational, international, or global company. Transnationals integrate assets, resources, and diverse people in operating units around the world" (p. 102).

The Global Manager. In tandem with the definition of the flexible transnational organization, Bartlett and Ghoshal (2003) asserted, rather than one definition of a "global manager," that today's organizations demand several kinds of managers: "highly

specialized yet closely linked groups of global business managers, country or regional

managers, and worldwide functional managers" (1992 reprinted 2003, p. 102). They go

on to say that "the greatest constraint in creating [a transnational] organization is a severe

shortage of executives with the skills, knowledge, and sophistication to operate in a more

tightly linked and less classically hierarchical network. In fact, in the volatile world of

transnational corporations, there is no such thing as a universal global manager. Rather

there are three groups of specialists: business managers, country managers and functional

managers" (p. 102). These managers require different skills to succeed.

Self-efficacy. The concept of self-efficacy was originally introduced by Vroom (1976)

and incorporated into research on Social Learning Theory by Bandura (1977). Shaffer et

al. (1999) define the concept as an individual's confidence in achievement of a goal and

interpersonal relationships developed for goal attainment but recent research has

suggested there is a strong component of the desire to learn in this behavior (Phillips &

Gully, 1997):

> Initially conceptualized as a belief in a person's ability to succeed in the
>
> enactment of a specific task (Bandura, 1977), researchers have recently explored
>
> the concept of general self-efficacy, defined as 'an individual's past experiences
>
> with success and failure in a variety of situations which should result in a general
>
> set of expectations that the individual carries into new situations' (Sherer et al.,
>
> 1982). According to these researchers, there are two dimensions of general self-
>
> efficacy: one focuses on performance achievements and another focuses on
>
> interpersonal relationship development. Because adjustment to international

assignments involves both dimensions, we would expect high levels of

achievement and social self-efficacy to facilitate this process (p. 561).

Social Support. Social support is defined by Ganster et al. (1986) in terms of the

sources and quality of helping relationships. Social support is presented in the literature

as a component of the mentoring process but it is a separate construct. Dimensions

include various sources and forms of support, which may include co-workers,

supervisors, friends, and families. According to Ganster et al. (1986) social support may

be positive or negative and "might take the form of emotional reassurance or assistance in

meeting goals" (p. 103).

Transnational and Multinational Corporations. International business

operations are often referred to as multinational corporations (MNCs) and "global"

enterprises. To be more precise, Bartlett and Ghoshal (1992 reprinted 2003) argued that

the complexity of organizations in recent decades called for a new definition of

enterprises operating across national borders: "This kind of organization characterizes a

transnational rather than an old-line multinational, international, or global company.

Transnationals integrate assets, resources, and diverse people in operating units around

the world" (p. 102). Today's organizations interact internationally with customers,

suppliers and employees which requires "a flexible management process, in which

business, country, and functional managers form a triad of different perspectives that

balance one another…so that transnational companies can build three strategic

capabilities: global-scale efficiency and competitiveness; national level responsiveness

and flexibility; and cross-market capacity to leverage learning on a worldwide basis" (p. 102). The companies in this study operate internationally but do not conform to Bartlett and Ghoshal's explanation of the transnational organization. Thus they are referred to as multinationals.

Expatriates and Inpatriates. Expatriates are defined as individuals living and working in a foreign environment. According to Briscoe (1995), they are usually classified into three broad categories based on their national origin relative to that of the parent company: Parent country nationals (PCNs) are expatriates who are from the home country of the multinational enterprise; third country nationals are non-PCN immigrants in the host country (e.g., those transferred between foreign subsidiaries); inpatriates are employees from foreign subsidiaries who are assigned to work in the parent country. For the purposes of this study, all expatriates and inpatriates are referred to as expatriates. It is common in the literature to find expatriates and inpatriates treated as one category to reach significant levels of statistical power.

<div align="center">

Summary

</div>

This chapter has presented the background of the problem and explained the need and purpose of the study. The research questions and appropriate methodology for analyzing the expatriate experience with mentors were introduced. Definitions of important terms have been provided. The overview offers an outline of the content of this dissertation. In the next chapter, there will be an extensive review of the literature on cultural dimensions, international assignments, and mentoring.

Chapter 2

A Review of the Literature

[The] increasing connection between countries does not mean that cultural

differences are disappearing or diminishing…When cultures come into

contact, they may converge on some aspects, but their idiosyncrasies will

likely amplify (Javidan & House, 2001, p. 291).

In tandem with transnational expansion of organizations, MNEs face a growing

need to develop their expatriate workers to assume roles as effective transnational leaders

(Adler, 2008; Den Hartog et al, 1999; Javidan & House, 2001; Mendenhall, 2006; Tung

1998). The theoretical and conceptual background for this study of expatriate mentors

involves three broad areas of research: the construct and dimensions of culture, expatriate

adaptation and mentoring in an international organizational context. The following

review of the literature will present salient issues in each of these areas as they relate to

expatriate development and adaptation on an international work assignment. First, several

theories on the dimensions of culture will present the backdrop for challenges

encountered on international assignments that present additional layers of complexity to

expatriate worker socialization and career development needs distinct from the domestic

environment. Second, review of the corporate practices related to expatriate selection,

deployment and training as well as dimensions of expatriate adjustment on assignment

will set the stage for discussing ways mentors might intervene or support expatriate

development and adaptation before, during and after an international assignment.

Finally, the research exploring expatriate mentors will showcase theories on domestic

mentoring and concepts of mentoring in an international context, primarily based on

quantitative studies predicting outcomes of mentoring protégés. The literature reveals the

lack of consistency in findings. One problem may be lack of an accurate concept of

mentoring in an international context. Thus this review of academic research supports

the need for a qualitative study to generate knowledge of the expatriate experience

aiming to refine the concept of mentoring international businesspeople.

The Construct and Dimensions of Culture: A Century of Theoretical Developments

Expatriates experience cross-cultural events daily. They interpret events in

another country through their own cultural lens as they encounter leadership styles and

organizational practices which may have a different meaning in their new cultural context

(Bennett, 2004). To enable today's global workforce to function effectively and

harmoniously with colleagues in the workplace, an understanding of cultural differences

and sensitivity to different norms and values has become a necessity.

Culture is defined as shared values, attitudes, beliefs, and norms developed over

time in relationship to a group's environment (Hofstede, 1999; House & Javidan, 2001).

Although there is an inclination to attribute a given culture to a nationality, culture is not

always so clear-cut. The US has been referred to as a melting pot of cultures (Lustig &

Koester, 2006) but, in fact, as immigrant populations retain societal value systems from

their home countries, multiple distinct cultures exist within the US workforce (Thomas,

2002). Also ethnicity is not synonymous with culture (Lustig & Koester, 2006). For

example, Hispanics represent a wide variety of regional cultures from Brazil and Mexico

to Puerto Rico and Spain. The cultural dimensions associated with a region vary based

on the socio-political histories and economic issues experienced by individuals from country to country (Thomas, 2002). These histories also carry perceptions of the practices in other countries with respect to international relations and the individual worker that may be invisible and unknown to an employer. All of these factors make the relationship between an organization and worker complex in a cross-cultural or multicultural environment (Kluckholn & Strodtbeck, 1961).

Learning about the constructs of culture, based on extensive research on cultural dimensions, provides a framework to recognize cultural differences, appreciate other worldviews, accept alternative behaviors, and interpret cultural practices in the workplace (Earley, Ang, & Tan, 2006; Gomez, 2003; Javidan & House, 2001; Javidan et al., 2002; Thomas, 2004). To present a selection of the frameworks for the dimensions of culture that are fundamental to understanding cultural differences, I have chosen four models developed over the course of the past 70 years. These authors have conducted seminal research foundational to this study. The discussion of cultural dimensions will be followed by a review of the literature on expatriate assignments and the mentoring process in developing human resources on expatriate assignments.

Cultural Value Orientations

Kluckholm and Strodtbeck (1961) were anthropologists who observed five different values orientations shared by cultural groups: the basic nature of human beings (good/evil), relationships among people (individual, group, or hierarchical), activity orientation (being/doing), relation to nature (subjugation, harmony, or domination), and time orientation (past/present/future). These dimensions are represented in various

countries in different ways but usually with one value from each set held dominantly by a

culture. For example, relationships in a culture could predominantly favor the group

while many members display individualistic tendencies. Thomas (2002) explained the

Kluckholm and Strodtbeck cultural value orientations in the following summary:

- Relationships to nature – People have a need-duty to control or master nature (domination), to submit to nature, or to work together with nature to maintain balance and harmony.
- Beliefs about human nature – People are inherently good, evil, or a mixture of good and evil.
- Relationships among people – The greatest concern and responsibility is for oneself and immediate family (individualistic), for one's own group that is defined in different ways [group], or for one's groups arranged in rigid hierarchy.
- Nature of human activity – People should concentrate on living for the moment (being), striving for goals (achieving), or reflecting (thinking)
- Orientation to time - People should make decisions with respect to traditions or events in the past, events in the present, or events in the future (p. 48).

To give an example of the contrast in these value systems across cultures, the US

has the reputation for "controlling nature" whereas Latin American cultures believe in

living in harmony or subjugation to nature. This value translates into work behavior in,

for example, the typically US reaction to a business problem of controlling the

"environment, [to] increase productivity and efficiency in accumulating material security

and personal comfort" (Ting-Toomey, 2005, p. 71). Latin Americans tend to believe that

humans, nature, and the environment are connected to one another and should live

harmoniously (Ting-Toomey, 2005, p. 73). People in Latin countries who have

experienced natural disasters such as floods, volcano eruptions, and earthquakes, may

believe subjugation to nature is part of "destiny" and not within their control.

The relationship with nature complements time orientation and the nature of

human activity. Anglo cultures are future and action oriented, "planning for desirable short- to medium-term developments and setting out clear objectives to realize them" (Ting-Toomey, 2005, p. 73). Whereas, cultures such as Greece and Russia "meetings are not planned in advance. They tend to have no agenda or a set time. They can go for hours and finish the meeting without any clear conclusions" (Javidan & House, 2001). The belief that workers can control future outcomes reflects values of controlling the environment. Cultures with this value orientation tend to devalue the wisdom of age and history and place a premium value on the potential of the perspectives of youth and innovation (Ting-Toomey, 2005, p. 73). By contrast, many Asian cultures do not look to the future but into the past, to their ancestors, to solve problems. Beliefs related to Buddhism view life as "predetermined by good and evil deeds of a past life" (p. 73). For African Americans and the French "the past is a historical canvas with which to understand the present" (p. 73). Mexicans tend to demonstrate a present time focus and live in the moment, "experiencing the rhythms of life and temporarily forgetting about the day's worries" (p. 74). From a business perspective, the "past-present" oriented cultures reflect upon an organization's history in planning for the long term while "future-focused" groups hold greater stock in the future and seek immediate or short term gains. Co-workers holding these divergent beliefs look upon each other with consternation and even mistrust, as cultural values are transferred to business practice (Brett et al., 2006; Trompenaars & Hampden-Turner, 1998).

Hofstede's Dimensions of Culture

Hofstede surveyed the impressions of cultural characteristics of over 70,000 IBM

employees in forty countries (1980) to categorize cultural values into dimensions. Based

on this work, he identified four, and later a fifth, dimension of culture: power distance in

relationships, uncertainty avoidance, individualism and collectivism, masculinity and

femininity, and Confucian sense of time (Bond, 1988). Power distance refers to the

extent that power differences are accepted and authority, respect, or rewards given based

on seniority, age, status or title. For example, Latin cultures tend to value "high power

distance," with norms that include hierarchical rights and unequal distribution of power

based on roles, including one-way decision making such as being obedient to the boss

and respecting parents or an elderly family member. "Low power distance" values

include equal rights, respect given for individual behavior and performance, and "merit-

based" rewards associated with western business and society.

Power distance is closely related to the individualism-collectivism dimension

(Earley & Gibson, 1998). This dimension is similar to Kluckholm and Strodtbeck's

(1961) cultural value of relationships, based on assumptions that place a priority on either

individual needs or the best interests of the group. The values associated with

individualism are: freedom, social recognition, comfort, personal equity, self-indulgence,

and honesty. Collectivism finds meaning in loyalty to the group through behavior that

promotes harmony, saving face for each other, equal distribution of rewards, obedience to

elders, and fulfilling needs of the group members. Although Hofstede conceptualized

individualism and collectivism as a separate, bi-polar dimension, Triandis (1995) found

individualism-collectivism to be multidimensional at the individual level, meaning that a

person may demonstrate both values depending on the situational context. Western

cultures are associated with individualism though there may be collectivists in these

groups.

The dimension of masculinity is associated with goal achievement, assertiveness

and power while femininity emphasizes nurturing, benevolence, and interpersonal

harmony. Latin countries score higher on femininity and collectivism than the US and

Canada, though there is some variation. Brazil and Ecuador tend to be outliers at

opposing ends of the scale compared to other Latin countries on these dimensions

(Javidan, et al., 2006), showing that ethnicity is not synonymous with cultural value

orientations and the existence of subtle differences between countries across borders in

close proximity.

Aspects of Culture Influencing Management and HRD Practice

In the third framework of culture, Trompenaars and Hampden-Turner (1998)

present seven specific cultural dimensions that may influence management practices, and

the underlying cultural assumptions that may affect international business outcomes.

These are: universalist/particularism, individualism/communitarianism, neutral/affective,

specific/diffuse, achievement/ascription, attitudes toward time (monochronic/

polychronic), and internal/external control (attribution of cause-effect of actions). To

explain a couple of these dimensions which cause consternation in those who observe

opposing cultural values in behavior, the universalist view relies on rules to apply to

behavior in all situations whereas the particularist will adjust the applicability of rules on

a "case by case" basus depending on the situation. The external locus of control attributes outcomes to "fate" or forces beyond the control of an individual. Whereas, internal locus of control emphasizes personal accountability and free will, with the expectation that personal effort and responsibility will result in predictable outcomes within the control of the individual. These values parallel Kluckholm and Strodtbeck (1961) cultural values of submission, harmony, or control over the environment and relate to psychological theories such as expectancy theory and self-efficacy (Bandura, 1986; Vroom, 1969).

One can see how these dimensions might produce conflict in business. An employee who regularly comes to work at a different time than his co-workers (particularistic), looks at time as a continuum in which he can get his work done (polychronic), and sees his time of arrival as the result of the fate of daily traffic delays or day care schedules (external locus of control) would be an enigma to a Westerner. The US culture generally subscribes to universalistic rules about the conventional workday. The term "banker's hours" refers to a monochronic view of the world (get to work "on time;" " 9 a.m. to 5 p.m." even if an employee who arrives to work "late" is willing to "make up" the time or is highly productive compared to other employees). Americans are conditioned to accept (and assume) that people possess an internal locus of control. For example, it is the individual's responsibility to work "regular business hours," i.e. traffic delays, etc., are no excuse for tardiness. Imagine the confusion when a westerner goes to work in the Middle East, where Saturday and Sunday are workdays and the weekends fall to other days of the week as a result of religious customs in the region.

Project GLOBE: Validated Cultural Dimensions

Finally, the Global Leadership and Organizational Behavior Effectiveness

(GLOBE) study (Javidan et al., 2001) explored the "cultural values and practices in a

wide variety of countries…to identify their impact on organizational practices and

leadership attributes" (p. 3). The GLOBE Study (2002) embarked upon extensive

research to explore the dimensions of culture within organizations across 62 countries

(House et al., 1999; 2002). Whereas, the methodology for defining and measuring the

constructs of Hofstede's (1980) cultural dimensions has been challenged over the years,

the nine dimensions presented by House and Javidan (2006) were based on surveys

administered in sixty-two countries, and various lanugages, resulting in reconceptualizing

"a few existing dimensions and [developing] a few new dimensions…to capture and

measure these cultural dimensions [with scales which] passed very rigorous psychometric

tests" (p. 69). The nine dimensions are: performance orientation, assertiveness, future

orientation, humane orientation, institutional collectivism, in-group collectivism, gender

egalitarianism, power distance, and uncertainty avoidance (p. 70).

Many of these dimensions resonate with dimensions in earlier frameworks. To

clarify the meaning of uncertainty avoidance, this value involves behavior with respect to

risk-taking and conflict. Cultures with "high uncertainty avoidance" tend to prefer clear

procedures to control predictability of future outcomes and avoid confrontation,

preferring harmonious and face-saving behaviors. "Low uncertainty avoidance" is

associated with willingness to deal with ambiguity, take risks with unpredictable

outcomes, and confront situations in a way that produces conflict or in which a person

may "lose face." Westerners are known for taking risks and greeting confrontation, reflecting values which often clash with other cultures in the workplace (Graham & Lam, 2003; Vodosek, 2003).

Cultural Distance and Organization "Culture Fit"

The GLOBE study (Javidan, et al., 2006) empirically identified ten geographic regions as "culture clusters" from the sixty-two societal cultures studied over a ten-year period. The clusters are: Latin America, Anglo (e.g. US, England, Canada), Latin Europe (e.g. Italy and Spain), Nordic Europe, Germanic Europe, Confucian Asia, Sub-Saharan Africa, Middle East, Southern Asia, and Eastern Europe. The study finds significant differences between these groups in terms of organization practices, values, and leadership attributes. For the performance orientation culture dimension, for example, the Anglo cluster, along with Confucian Asia and Germanic Europe, scored highest while Latin America and Eastern Europe scored lowest. The dimension that reveals extreme difference between Anglo and Latin clusters is in-group collectivism, in which Latin countries show higher loyalty to "in- groups" (e.g. family) whereas Latin scores on institutional collectivism are at the opposite extreme. The Latin cluster values include avoiding uncertainty and the present time orientation compared with Anglo (U.S.) risk taking and future goal orientation. These differences in value systems result in differing perceptions of evaluation and rewards for performance (Javidan et al., 2006, p. 70). The range of these values support the observation by Trompenaars and Hampton-Turner (1998) that there are a wide variety of organizational practices worldwide which may be acceptable and effective in one country but completely unacceptable and ineffective in

another. These practices are based on organization cultures rooted in cultural values (Aycan, Kanungo & Sinha, 1999).

Researchers have proposed models to compare the "culture fit" or "cultural distance" between various cultures to aid leaders and managers in developing appropriate practices for work across cultures (Black & Stephens, 1989). One quantitative model used an equation to find the measurable difference between country scores on all of the Hofstede (1980) cultural dimensions (Thomas, 2002). However, this method has limitations, as does generalizing cultural frameworks to individuals according to their cultural heritage or ethnic group. Aycan, Kanungo, and Sinha (1999), presented a model to analyze the socio-political framework, the enterprise environment (economic and industry), the organization work culture, and the employee related culture assumptions compared to the dominant socio-cultural assumptions of the organization to consider in job design, management practices, and reward systems (p. 503). This model was useful in comparing management practices and employee preferences of Canadian and Indian workers. The model highlights the importance of understanding the historical social and economic roots of organization cultures to increase the ability of international managers to develop appropriate responses to employees of different cultural backgrounds.

Cultural Complexity

In addition to the dimensions of culture, the complexity of the host country culture weighs into the analysis of expatriate adaptation. Triandis (1989) present tenants of social psychology to point out that acceptance into a group within a society varies depending on the complexity, level of individualism/collectivism, and looseness of a

culture. The extent of cultural complexity is evidenced by the level of technical specialization, transportation system, levels of social stratification, population density, levels of political integration, affluence of the population, number of occupations, language, and fixity of residence, to name a few characteristics. Cultural complexity will influence whether an expatriate will be accepted into a group and individualism/collectivism will dictate the level of conformity in behavior required of an outsider in that group, while the tight or looseness of a society will determine the degree of variation from norms that will be accepted by the group (Triandis, 1989, p. 213). These factors affect feelings of confusion, isolation and exclusion as an international assignee attempts to "fit in" at work, and in general, in the host country (Caligiuri & Lazarova, 2002).

Theories and Research on International Assignees

The complexity of adapting to work in another culture is multilayered. Organizations have a vested interest in ensuring their expatriates successfully accomplish their intercultural adjustment. Learning about the dimensions of culture provides a valuable starting point for understanding that people and organizations do not behave the same across cultures. International businesspeople need to learn to operate in multiple value systems. Theories in human psychology, cognition, and intercultural communication illuminate the thinking and assumptions, which create potential minefields for employees interacting across cultures. Meanwhile, social learning theory offers an avenue for developing cultural intelligence, to improve workers' ability to function across cultures. In this section, theories underlying expatriate adaptation,

practical challenges of various phases of the international assignment, and findings from empirical studies of organizations with expatriate workers will be discussed.

Theories of Social Cognition

Gaining insight into the experience of the expatriate requires an awareness of not only the dimensions of culture but also an understanding of human expectations and reactions to encounters with culturally different societies and organizations. People interpret the behaviors of others based on their own set of fundamental values and beliefs (Triandis, 1995). Theories of social cognition support the basic expectation among people who speak the same language and live in the proximity of one another that people in society will behave predictably (Thomas, 2002, p. 70). Humans produce subconscious "scripts" and "schemas" to interpret and understand events and behaviors in their environment (Fiske & Taylor, 1984) and to create a sense of who they are in comparison to others (Erez & Earley, 1993). This tendency causes a "them and us" subconscious categorization used by people to label others based on "characteristics that they share, such as physical appearance, religion, political views, lifestyle, and country of origin…To the extent that culture is consistent with these more directly observable characteristics, we are categorizing them according to their cultural group" (Thomas, 2002, p. 71).

Bennett (2004) maintains that accepting other cultures begins with the awareness that one's own view of the world is one perspective and that there are equally valid values and customs in other cultures. This epiphany does not come easily nor is the appropriate behavioral response natural or obvious (Paige & Martin, 1983). "Selective

perception" takes place when people filter information that is contrary to their existing worldview and either "tune it out," or pay extra attention to it (Triandis, 1995). This results in cultural differences being perceived in a skewed fashion. People may interpret the "other" culture to be incompatible to their own and judge people within that culture to be "all alike" and more similar to each other than the observer. These perceptions in the workplace affect both the employee's impression of the organization culture and co-worker's perceptions of each other, affecting the compatibility of the employee and organization (Ramamoorthy & Carroll, 1998).

Part of the battle of expatriate workers is to fight the scripts, schema and stereotypes that are mentally programmed from birth, and to develop new interpretations of behaviors in another culture. The use of stereotypes are "mental short cuts" that people employ to cognitively process knowledge, beliefs, and expectations about a group to simplify ambiguity, complexity, and uncertainty of an unfamiliar behavior, event, or environment (Caligiuri et al., 2001). The stereotypes associated with some ethnic groups, in the U.S., for example, might be intertwined with perceptions about the jobs they hold, proficiency in the English language, US immigration policy, and socio-economic level of the majority of the members of the group. The psychology behind using stereotypes is that they create a sense of security and confidence for people in dealing with foreign groups and contexts, but the expectations and evaluations of these situations based on stereotypes proves an "inappropriate, ineffective, and harmful guide" to cross-cultural working relationships (Adler, 1986). New scripts and schema need to be developed, to

react appropriately when encountering different values systems and societal norms

(Langer & Moldoveanu, 2000 in Thomas 2006).

Communication Across Cultures

A substantial body of research suggests that communication styles vary across

cultures. Thomas and Pekerti (2003) proposed that communication behaviors are "logical

extensions of the internalized values and norms of their respective cultures" (p. 139). As

discussed in the section on dimensions of culture, individualism and collectivism affect

people's behavior and cultural norms. Hall (1976) asserted that in individualistic

cultures, people tend to communicate through direct, or explicit, verbal exchanges,

whereas, collectivist cultures generally use inexact, ambiguous, and implicit language,

requiring participants to rely on contextual clues, outside of verbal statements, to

understand each other in social exchanges. Hall (1976) referred to these style differences

as "low context" for cultures that "say what they mean" and "high context" for cultures

that deliver meaning in the "context" of a situation and nonverbal behavior more than in

spoken words.

In addition to high and low context communication being tied to cultural values,

the processing of information and intent of social exchange is strongly influenced by the

dimensions of individualism and collectivism. Individualistic cultures tend to process

information with a factual-inductive approach and task completion orientation

(idiocentric) (Triandis et al., 1993). By contrast, collectivist societies value "shared

meaning" and interdependent relationships as the purpose of social discourse over fact-

finding and goal achievement. In individualistic societies, the relational and shared

meaning (sociocentric) (Triandis et al., 1993) plays a secondary role in social exchange to achieving goals. Being aware of these differences enhances intercultural understanding but research indicates that adapting to another cultural communication style may be misinterpreted after adapting to a certain level (Thomas & Ravlin, 1995). The cross-cultural research in work negotiations and management situations in international organizations indicates people tend to revert to their nascent cultural style of communication under pressure (Pekerti & Thomas, 2003). When communication differences attributed to culture exist in the workplace, performance suffers because projects take longer to complete (Pekerti & Thomas, 2003).

Multicultural Teams: Conflict Management

With the backdrop of expatriate challenges in interpreting workplace behavior associated with cultural differences, managing conflict in multicultural teams has caused concern for international organization development and drawn the attention of researchers (Brett et al., 2006; Gibson & Zellmer-Bruhn, 2002). In multinational organizations, work teams often are comprised of employees in the same office from various cultural backgrounds or teams of experts working together virtually across continents on highly visible, critical projects. These teams routinely experience some kind of conflict, but Vodosek (2005) found that the more cultural diversity in a work group, the more interpersonal relationship, process, and task conflict there is in the group. As a result, workers not only become dissatisfied with their jobs but also feel the project outcome suffers. Vodosek's findings about the group outcomes "fly in the face of research findings that task conflict has a positive effect on group outcomes" (Vodosek,

2005, p. 6). Thus innovation and performance will be advanced through diverse work groups only if the team and tasks are selected and managed carefully. This situation has major implications for international assignees. How does an organization train individuals and manage team performance with the knowledge that global teams are destined to encounter obstacles and setbacks due to cultural diversity? Are managers held accountable in this situation to smooth the tensions and devise development plans to meet the needs of culturally diverse employee values?

Brett, Befar, and Kern (2006) found that multicultural teams experienced conflict for four reasons: direct versus indirect communication, trouble with accents and language fluency, differing attitudes toward hierarchy and authority, and conflicting norms for decisions making. Dispute resolution is delicate in cross-cultural situations. Managerial guidance can make a difference as long as they avoid "single-culture-based approaches to multicultural situations" (Brett, et al., 2006, p. 86). Thus the expatriate role is pivotal in helping multinational organizations manage the friction caused by cultural difference inherent in international work (Marquardt, 1999; Woodall, 2003).

Cultural Intelligence: Self-efficacy & Social Learning Theory

The successful expatriate worker shows a keen interest in different cultures and learning to interact effectively, socially and professionally, in the international arena. Earley and Ang (2003), Earley and Mosakowski (2004) and Thomas and Inkson (2003), have researched the construct of "cultural intelligence" (CQ): a multifaceted aptitude for awareness and ability to engage in appropriate behaviors in foreign contexts. Thomas (2002) maintains that a clear sense of one's identity and personal humility in the face of

cultural mishaps is fundamental to the ability to adapt across cultures. This demonstrates self-efficacy: persistence in attempting to attain a desired outcome in the face of obstacles and mistakes (Vroom, 1969). Three components of CQ that may be developed through training are the knowledge of cultural values and norms, "mindfulness" of the different meanings of norms and actions in another culture and mindfulness of one's motivation when reacting to certain behaviors, and the "hardiness" to learn and grow (and change behavior) when faced with unfamiliar or frustrating situations (Thomas & Inkson, 2003). Mindfulness is described as a "metacognitive strategy that regulates thinking to understand one's own behavior in the planning and monitoring of performance in the use of cognitive strategies….facilitating the choice behaviors that are consistent with one's needs and values" (Thomas, 2006). The mindful expatriate will have a heightened attention to his internal state and the external environment "adopting a particularly active approach to cognitive processing…seeking new perspectives" (Langer & Moldoveanu, 2000, in Thomas, 2006). The evidence that "cultural intelligence" is trainable through experience with customs, norms, and beliefs of other cultures (Earley, 1987) is rooted in social learning theory (Bandura, 1977; Black & Mendenhall, 1990).

Social learning theory (SLT). SLT integrates cognitive and behavioral learning theories (Black & Mendenhall, 1990) and forms the underpinnings of understanding organizational behavior and management training (1990). Bandura (1977) showed that learning is affected by both observation and experience. As explained earlier, scripts and schema are formed in people's minds that lead them to anticipate actions and the

associated meaning and consequences in society. To adapt to other cultures, seeing the

role-plays (cultural assimilators) or scripts of differing social norms, and receiving

instruction on their meaning, enables travelers to develop and retain a new understanding

of accepted behaviors in another culture. The central elements of SLT are attention,

retention, reproduction and incentives for learning new behavior (Bandura, 1977).

Expatriates tend to fully engage in the SLT process for cross-cultural training since the

stakes of a failed assignment are high and they have a personal need to reduce uncertainty

produced by cultural novelty in the host country. Expectancy theory and self-efficacy

(Vroom, 1976) plays a part in SLT and success of expatriates, who will execute certain

behaviors to achieve desired outcomes. Self-efficacy is the ability to persist in

accomplishing a goal (Black & Mendenhall, 1990). In this case, learning about another

culture and adjusting one's behavior in response to observing different norms takes a

higher degree of persistence and confidence in the face of mistakes because the degree of

novelty in cultural differences and the level of ambiguity experienced in the adaptation

process is higher than in most domestic situations.

The awareness of cultural differences and ability to learn new behaviors in

response to other cultures is necessary for successful transnational work. This learning

and adaptation begins with an understanding of one's own culture, acknowledging the

legitimacy of other cultures (Hofstede, 1980; House et al., 2002). Researchers have

developed several assessments for dimensions of CQ. One is the Cross Cultural

Adaptability Inventory (CCAI), which was introduced in 1992 as a tool to assess cultural

awareness and develop an action plan for employee development (Kelley & Meyers,

1992). Another instrument, the Intercultural Development Inventory (IDI), was developed by Bennett (1993), which is widely used to determine the readiness of Peace Corps volunteers to adapt to another culture during a work assignment. Specific intercultural training has been shown to develop the cultural "mindfulness" (Thomas, 2002) needed to adapt behavior appropriately in international contexts of business. It should be noted that social or "emotional" intelligence is a construct of intelligence that includes sensitivity to behavioral reactions in social interactions separate from CQ (Mayer, Caruso, & Solovey, 1999 in Perkarti & Thomas, 2006). However, contrary to the suggestion of Jassawalla et al. (2004), that emotional intelligence be a prerequisite for selection of international assignees, social intelligence assessed in one culture does not necessarily transfer to other cultures (Thomas, 2006). Some managers demonstrate their emotional intelligence in domestic operations but have limited success interacting in a multicultural context (Begley & Boyd, 2003).

Expatriate Assignments

Transnational organizations seek expatriates who will be productive during their international assignments, using their technical knowledge and business savvy to solve problems in their new job. Yet systems are not in place for adequate selection, training, or ongoing support of international assignees to ensure their success (Black & Mendenhall, 1990; Jassawalla et al., 2004; Osman-Gani & Zidan, 2001; Ronen, 1989; Tung, 1987). Researchers use different measures of international worker success, but a few key indicators are the expatriate's ability to 1) adapt to a foreign culture, 2) complete the assigned project effectively without early repatriation, and 2) the employee managing

the assignment in a way that builds relationships and does not alienate foreign workers,

governments, or customers (Oddou, 2002). The statistics for these outcome measures are

mediocre. US MNC's report a 20 to 30 percent failure rate of managers selected for an

international assignment (Black & Gregersen, 1999).

Organizations are concerned about an expatriate's early return because the

financial investment is great and the assigned work is critical to organization

performance. Companies may invest upwards of a quarter of a million dollars on one

expatriate package for an annual tour of duty overseas (Black & Gregersen, 1999). Over

the past twenty-five years, various research paradigms have been used to gain insight into

ways to improve selection, support, and development of expatriate workers. The primary

focus of the research has been on the expatriate adjustment to another cultural context.

Factors Influencing Cultural Adaptation

In the extensive body of expatriate research, most studies focus on the potential

variables influencing expatriate adaptation and the interventions organizations might

implement to improve international business acumen for all employees to work across

cultures effectively. Cross-cultural adjustment is the variable that separates the

experience of the expatriate from other career transitions in work role and responsibility.

Cultural adjustment tends to predict successful completion of an international assignment

(Caliguiri et al., 2001a; Oddou, 2002). According to a model proposed by Black et al.

(1991), there are three dimensions of adjustment: the job itself, interaction with host

country national workers, and adjustment to the general culture of the society. Within this

construct, there are two major components of expatriate adjustment: Anticipatory

adjustment (proper selection and accurate expectations for an specific job and country assignment) and "in-country" adjustment. The latter consists of four determinants: adjustment to the job, adjustment to the organization (which includes cultural novelty of the host country and social and logistical support from the headquarters or home office), non-work adjustment (for family and social life), and individual adjustment (self-efficacy and interaction with others). Shaffer et al. (1999) tested the factors of the model in a self-reported assessment of adjustment and regressed each adjustment variable as a predictor of organization commitment and intent to quit while testing the moderating factors of individual differences in self-efficacy, language skills and position in the organization (hierarchical level, business functional area, and national origin in relation to assignment (Parent Country National (PCN), Third Country National (TCN), or Inpatriate). These studies represent a broad range of the potential predictors of expatriate success, but they are not exhaustive.

Personality traits play a significant role in expatriate adaptation based on the evolutionary theory of personality, an adaptive mechanism of sensing a negative outcome and withdrawing from a situation (MacDonald, 1998, in Caliguiri, 2000). According to Caliguiri et al. (2000), in a validity study of the influence of personality traits and the expatriate's decision to persist to the completion of their international assignment with positive, supervisor rated performance, agreeableness and extroversion had predictive effects of the desired outcomes. The findings of this study indicated neither a relationship between emotional stability nor openness/intelligence to staying on assignment. Other studies have indicated the importance of agreeableness and

extroversion as well as openness to experience and emotional stability to persistence on international assignments (self-confidence and ability to deal with psychological stress) (Arthur & Bennett, 1995; Hammer, Gudykunst, & Wiseman, 1978; Mendenhall & Oddou, 1985). Conscientiousness, a trait that is valued in the workplace, was not a predictor of completion but of manager rated performance on assignment. Studies have suggested additional traits characterizing well-adjusted expatriates that are related to personality, such as tolerance of ambiguity (Yavas & Bodur, 1999) and optimism (Jassawalla et al., 2004). Boss (1990) developed the *theory of ambiguous loss*, which describes the feeling of "missing" past relationships, belonging to a social group, familiar settings, "fitting in" to a work environment or neighborhood, etc. This sense of loss is particularly stressful to expatriate workers who describe the angst caused by missing their families, friends, and the familiarity of their native customs while on assignment. The demands and distance involved on international assignments preclude expatriates from easily "recharging" by getting a fix of familiar people, customs, and surroundings (Cooper, 2008, unpublished manuscript). The results of these studies and theories have implications for the training and selection process for international assignees.

Cross-Cultural Training

Ronen (1989) advocated scholarly work in cross-cultural training, citing both the diminished empirical research and consequent lack of theoretical developments in the 1960s and 1970s in this area, despite an increase in international assignees to match a rising failure rate on assignment. Making the observation that the international assignee, " must possess the patience of a diplomat, the zeal of a missionary and the linguistic skill

of a United Nations interpreter" (p. 418), Ronen (1989) outlined a "classic staffing model," identifying criteria for performance and attributes for success of the expatriate worker as a basis for the cross cultural training needs assessment. In the 20 years since Ronen's call for articles, research has mushroomed (Oddou, 2002), testing and touting the effectiveness of cross-cultural training in various forms (Black & Mendenhall, 1990; Jassawalla et al., 2004; Osman-Gani & Zidan, 2001; Ronen, 1989; Tung, 1987, 1998).

Unfortunately, cross-cultural training in corporate practice has trailed the research by a wide margin: only 30 percent of managers sent on expatriate assignments received training 30 years ago (Baker & Ivancevich, 1971; Tung, 1981) and in the new millennium the figure has not grown by much, (Jassawalla et al., 2004). Often expatriates are deployed in such a hurry that, although 70 percent of multinationals claim to offer one day of cross cultural training for international assignees (Global Relocation Trends Survey report, 1998, in Caligiuri, 2001), studies report feedback from expatriates that the training doesn't happen or is not helpful (Jassawalla, et al., 2004; Mezias & Scandura, 2005, p. 525). The reality is that management adopts a '"sink or swim" policy that places the responsibility of learning about the foreign culture squarely on the manager" (Jassawalla, et al., 2004). Oddou (2002) attributes the flawed system to a lack of integrated international human resource strategies resulting from organizational priorities for investing resources in operational business issues such as product innovation, quality and cost sourcing and not human resources (p. 301). In practice, organizations find investment in international assignees to be at a high cost and limited measurable benefit to organizational performance (Ronen, 1989), while the research suggests expatriate

training is effective (for e.g. Black et al., 1991; Tung, 1981, 1998) and critical to

transnational organization learning (Harvey et al., 1999) and performance (Shay &

Baack, 2004).

Despite limited implementation of cross-cultural training programs in western

multinationals, research endorses a variety of methods and content for training

international assignees on differences in cultural norms and behaviors as well as facts

about economic and political history of their host countries. Black and Mendenhall

(1990) reviewed 29 cross-cultural training programs, which indicated there is value in the

effective reinforcement of learning about cultural difference through behavioral modeling

steeped in social learning theory (Bandura, 1986). The training content and methods in

the literature included: Assimilator training (Albert, 1983, in Ronen 1989; Triandis et al.,

1974); affective, cognitive, specific, general and self-insight training (Triandis, 1977);

attribution training, (Brislin, 1980); documentary and behavioral training (Earley, 1987);

mentoring (Jassawalla et al., 2004) and relevant, specific, work preview training

(Caliguiri & Lazarova, 2002). Tung (1998) recommends sensitivity training to raise

awareness of cross-cultural difference, learn to suspend judgment, and develop listening

skills. Learning about conflict management and building trust with co-workers and

managers in specific cultures is recommended (Jassawalla et al., 2004). Tung (1998)

urges that cross-cultural training take on a "lifelong dimension" for success of

transnational organizations.

Multiple studies suggest that pre-departure training should include a site visit to

the host country for the expatriate's family and a realistic job preview with the complete

"package" of benefits for the assignment disclosed before arrival at the host country

(Caligiuri & Lazarova, 2002; Caliguiri et al., 2001; Oddou, 2002; Tung, 1998).

Returning expatriates and their families are an excellent resource for obtaining a realistic

preview of an international assignment. Although European nationals "provide ample

opportunities for outgoing families to discuss their overseas assignments with

expatriates" this practice is not formalized in the US (Tung, 1987). Ronen (1989)

proposes sending the incumbent expatriate (and family) to live with a host family in the

host country prior to assignment to observe, first hand, the norms and rhythm of the

culture. Finally, companies must make provisions for managing the repatriation career

path, so expatriates are not concerned or distracted while on assignment by the lack of

information on future opportunities for a job that leverages their skills upon return (Black

& Mendenhall, 1990; Lazarova & Caligiuri, 2002; Tung, 1998). According to Baruch et

al. (2002) 50 percent of repatriates leave their employer within a year of returning from

their international assignment as a response to negative re-entry experiences associated

with mismatched job placement and floundering of high potential employees. Despite

extensive research directed at the problem, organizations are inconsistent in integrating

plans for expatriate development into the talent management system and succession plan

of a transnational corporation.

Tung (1998) urges corporations to use global assignments to prepare future

executives who possess strong negotiating and human relations skills, with an emphasis

on understanding nonverbal (high context) communication. The transfer of training is

related to organizational and environmental factors, the most relevant factors that require

linking are executive training programs and management-succession process with

corporate strategy (Hall, 1986). Ronen (1989) notes that this recommendation for cross-

cultural training in executive ranks, "given the present state of affairs, is farfetched" (p.

442). Tung (1998) indicates that the cavalier attitude is unique to western multinationals,

whose executives have taken an ethnocentric view of international work: "for many

decades now, nonwestern countries have been trying to learn and understand about the

west; however, westerners have only begun recently to learn about the non-western

societies. Hence there will be a lot of catching up to do" (p. 1). Western corporate

attitudes regarding selection and training sets up unqualified expatriates, who were

otherwise successful at their domestic jobs, for failure or, at least, a very stressful

international experience (Harvey et al., 1999; Ronen, 1989). To alleviate the stress with

host country nationals, Caligiuri and Lazarova (2002) suggest training the host country

nationals about the expatriate culture, so they can ease the culture shock by understanding

the outsider's point of view.

Training in Cross-Cultural Settings: The Etic and Emic Perspectives

Despite the face validity and relevance of research recommendations for cross-

cultural training, the "impact of the research on practice has been limited at best" which

indicates the need to adjust practical decisions and expectation about training content and

methods (Osman-Gani & Zidan, 2001). Osman-Gani and Zidan (2001) suggest that

training design has not demonstrated sensitivity to changes in the cultural make up of the

target audiences in contemporary organizations. Tung (1998) points out the demographic

changes in the US, reflecting increased percentages of women and minorities, particularly

in the US, which means "policies and practices need to be revised to accommodate this development"(p. 1). Some cultural groups resist individual, experiential training and prefer trainer-centered, content focused lectures. In one study, "Cognitive styles of westerners were compared to Asians and showed that Americans tend to use more logical, sequential reasoning and are more likely to use abstract concepts and universal laws whereas Japanese are more likely to focus in particular instances and sensitivity to the context" (Docktor, 1982, in Osman-Gani & Zidan, 2001). The style of communication of the trainer and trainees, both verbal and nonverbal, must be considered for training to be effective. In essence, training must be culturally sensitive to effectively transfer cross-cultural learning to the workplace to justify the cost and implementation of training.

The research on training practices across cultures shows that design and implementation of this training needs to be approached from both the emic and etic viewpoint (VonGlinow, Drost & Teagarden, 2002). The "emic" and "etic" concepts emerged from anthropology, in which the "emic" is study of a culture by insiders who are part of the culture and leads to consensus of the practice by those who share the culture. Whereas "etic" is the study of a culture by outside researchers using scientific methods that meet the test of validity and reliability (Headland, Pike, & Harris, 1990). Once the comparison is made between etic and emic findings, a determination may be made about which practices are universally acceptable and which will vary in effectiveness across cultures. Although this process has some merit, it is a cumbersome process requiring

multiple culture comparisons across systems and functions and may be costly in practice to implement though theoretically sound.

The Development of Global Leaders: Does Mentoring Play a Role?

Particularly relevant to multinational organization development, and the etic and emic perspectives, is the intention to send high potential employees on international assignments to develop skills to become an effective "global manager" (Mendenhall, 2006; Woodall, 2005). Since studies show that corporations with CEOs possessing international experience demonstrate higher profitability (Shay & Baack, 2004), and returning expatriates are not a large percentage of the management talent pool, there is a need to develop leadership skills in a multicultural environment by sending high performers overseas (Dalton, 1998). Further evidence that cross-cultural knowledge increasingly creates a competitive advantage in business is the reality that, in the past decade, the BRIC countries (Brazil, Russia, India and China) have experienced higher economic growth than the western powers and continue to invest in the US and other western countries (Carnegie Report, 2009; International Monetary Fund, 2010). Substantial international human resource development (HRD) research has focused on leadership development, recognizing the organizational priority of selecting and grooming employees with the knowledge, skills, and abilities to become leaders in an era of globalization (Ardichvili & Kuchinke, 2002; Hamlin, 2004; Kowske & Anthony, 2007; Woodall, 2005). This priority is reflected in practice by the fact that leadership development consumes a significant portion of organization training and development resources (Collins & Holton, 2004).

The literature argues that one of the main objectives for mentoring expatriates is developing "high potential" employees for leadership positions (Feldman & Bolino, 1999; Mezias & Scandura, 2005; Ragins, Cotton & Miller, 2000). Multinational organizations face several problems in executing leadership development initiatives. First, there is little agreement on leadership competencies and the measurable outcomes attributable to becoming an effective global leader (Bartlett & Ghoshal, 2003; Bass, 1990; Conger, 1992; House, 2002; Mendenhall, 2006; Smith & Bond, 1993; Triandis, 1993). This is an ongoing debate in research and practice. Are leadership behaviors and abilities universal or culture specific (Conger, 1992; House, 2002; Mendenhall, 2006)? Both arguments have been supported empirically depending on how constructs are defined (Javidan, 2002). Hamlin (2004) argues that the criteria for effective leadership are universal, whereas, Woodall (2005) challenges this position, stating that behavioral competencies differ across cultures and they are contingent on location. Woodall cites additional research in which the definition and use of the term competencies are different across cultures and industries (Woodall, 2005, p. 1).

According to a study based on Personnel Decisions, Inc. (PDI) assessment center data collected from 561 companies in twelve countries, leadership competence is conceptualized differently across cultures (Kowske & Anthony, 2007). While Kowske and Anthony (2007) found the two competencies consistently valued across cultures, are the ability to analye issues and foster teamwork (p. 31). The significance of these two competencies means that other competencies were not valued to the same extent in different societies. Furthermore, it raises the question of *how to* effectively "foster team

work" conforming to specific cultural norms of a given country. For multinationals, what does this mean for mentoring international leaders? Den Hartog, House, Hanges, and Ruiz (1999) found twenty-one positively endorsed leadership attributes, six of which were universal across cultures, and eight attributes with universally negative connotations. Mendenhall and Osland (2002) reviewed the literature of competencies fitting the "global leadership construct." They narrowed the competencies down to fifty-two, and further refined these competencies into six categories of skills, expertise, abilities, and traits. Mendenhall and Osland (2002) argue that training for global leaders is not simply a matter of "what" competencies to train but "how" leaders need to learn these competencies, advocating cultivation in an orderly, experiential manner (Mendenhall, 2006): "only then do trainees have enough of a foundational understanding to begin to explore the complexity of the actual interrelationships between the competencies" (p. 424). Mendenhall's (2006) research raises the question of assessment of leadership potential and a mentor's role in cultivating it in protégés. How does a global organization establish mentoring practices across cultural dimensions when the value of leadership traits and competencies vary across-cultures? Feldman and Bolino (1999) assert that mentoring could potentially assist expatriates to learn subtle differences of leadership behaviors on international assignment.

Ghoshal and Bartlett (2003) maintain: "there is no such thing as a universal global manager. Rather, there are three groups of specialists: business managers, country managers, and functional managers…And there are executives…leaders who can manage the complex interactions between the three - and can identify and develop the talented

executives a successful transnational requires." If these are the leaders that transnational organizations need to develop, how do expatriates utilize mentors and other resources to prepare for their future roles in the transnational organization and how can organizations foster their development process?

Selection of International Assignees: Traits, Skills, Knowledge and Attitude

Ideally, cross-cultural training and mentoring would complement the expatriate selection process (Tung, 1998). Based on literature already reviewed, selection would target employees who are already identified as flexible, open-minded, resourceful, creative, confident, have a cohesive family and manage stress well (Oddou, 2002; Tung, 1998). Additional preferred attributes are tolerance of ambiguity (Yavas & Bodur, 1999), optimism, and the desire to go on the assignment (Jassawalla et al., 2004). In a study by Caliguiri et al. (2000), the findings suggest that the international selection process take personality into account, seeking extroverts and agreeable expatriates. Ronen (1989) recommends using assessment centers to identify abilities through valid psychological instruments. Skill in the official language of the host country is an important qualification, too (Osland, 1995; Tung, 1998). The crucial nature of training in the host country language seems obvious to most of the world. In a survey of 3000 executives around the world, knowledge of a foreign language was identified as "critical to a firm's competitive advantage. Only respondents from the four English-speaking countries …deemed such skill as unimportant" (Tung, 1998, p. 6). One can only speculate on the quality of business decisions made while western multinationals are missing information provided in non-English conversations at the meeting table or board room.

Nevertheless, the research on western multinationals indicates they persist in sending three types of employees overseas: the technical experts, the high performers and those willing and available to go on assignment (Oddou, 2002). These organizations seem to follow the unproven principle that "good managers will be good performers as managers wherever they serve" (Osman-Gani, 2001). According to Ronen, (1989) the expatriate's interpersonal ability "most often accounts for the assignee's success or failure, at the same time that headquarters executives most thoroughly ignore it" (p. 431). The outcome of this shortsighted view, is that US organizations have the highest failure rates when going to less developed countries, while European and Asian expatriates do best (Carraher et al., 2008). According to the literature, the west has a reputation for being ethnocentric which might explain the low priority of training and high incidence of failed assignments. Training and selection are intentional investments for international assignees in nonwestern countries. Japanese and European firms routinely send their high potential and expatriate managers to training programs for several days or months of cross-cultural and language coaching and instruction to "shape the mentality" of the expatriate about their host country's attitudes toward education, families, gender, age, and any foreigners who come to live with them (Tung, 1987). It is not uncommon for the prospective expatriate to "shadow" the manager in their future role and attend briefings on international economics and finance in house. These practices reduce failed assignments and increase productivity in international projects.

Organizational Intent for the International Assignment

The rationale for sending expatriates on assignment fall into three categories: headquarter control over the local operation, instilling organization culture, and technical knowledge transfer/management (Crocitto 2005; Feldman & Thomas, 1992; Kamoche, 2000). There are specific instances where the expatiate role is to execute a transaction or "deal" such as a merger or acquisition of another company (Adler 2008; Graham & Lam, 2003). Two major organization development objectives inherent in internal assignee roles are building social capital with employees and management in remote operations and career development of the expatriate for future leadership positions (Harvey et al., 1999). The intellectual and social capital developed through expatriate work requires expanding not only the technical knowledge but also political and interpersonal skills necessary to perform their responsibilities optimally in another culture (Mezias & Scandura, 2005). To accomplish these goals, Harvey et al (1999) suggest, "given the increased complexity of expatriation assignments, the adaptation of mentoring for global assignments would appear to be a worthwhile goal" (p. 809).

Shay and Baack (2004) argue that "the perceived reasons for being sent overseas…influence modes of adjustment" (p. 217). In their study, Shay and Baack (2004) do not focus on the extent to which expatriates adjust to the international assignment and host country but examine how the expatriate adjusts, i.e. personal change or in role innovation on assignment (Nicholson's work role transitions theory, 1984 in Shay & Baak, 2004). The findings indicate that expatriates effect personal change in subordinates and themselves when "management control" is the purpose of the

assignment. Furthermore, management development influences expatriate managers to effect personal change and role innovation for themselves. Each of these findings, in turn, results in positive subordinate ratings of expatriate effectiveness in the host country. The concept of mentoring seems to be a viable approach to support the complex interplay of personal change and role innovation involving the expatriate and his/her subordinates to meet organizational goals.

The Role of Expatriate Mentors

Most research on mentoring has focused on employee development in domestic, western organizations. This section will review the current theory and concept of the mentoring process, potential indicators, and associated outcomes for individuals and the organization. Kram (1985) defined mentors as individuals with experience and knowledge who are committed to providing career support and advancement to their protégés. Senior members or peers in an organization can provide everything from task direction and coaching to social support and a positive role model for a less experienced employee (Feldman & Bolino 1999, p. 59). Mentor theory suggests that mentoring relationships produce positive job and career perceptions of the protégé, such as organizational commitment, satisfaction with opportunities for promotion, and intention not to quit (Ragins, Cotton, & Miller, 2000). Chao et al., (1992) found that protégés reported higher organization socialization and salaries.

Originally the term " mentor" was limited to one-one-one pairing of an experienced employee with a protégé (Kram, 1985) and has evolved to look broadly at networks of mentors over the course of professional lifetime who aid in managing stress

and uncertainty of changing work roles and expanding professional responsibilities

(Higgins & Kram, 2001 in Mezias & Scandura, 2005). Mentors may be assigned through

a formal mentoring program or develop informally through work relationships between

the mentor and protégé. Potential areas for mentors to aid in a protégés' development

are: interpersonal and communication skills (such as cross-cultural skills, conflict

management, listening skills, and presentations), leadership skills (such as delegating and

motivating others), cognitive skills, (such as prioritizing, decision-making and strategic

thinking), and personal management (time management, anger management, and work-

life balance) (Peterson, 2000). For expatriate workers, the aforementioned content could

be areas covered in a cross-cultural training program, but since so few expatriates receive

training before going on assignment, mentoring offers opportunities to learn similar

information, specifically relevant to each phase and facet of the assignment and to assist

the employee in the cultural adjustment process.

How are Expatriate Mentors Different from Domestic Mentors?

Expatriate workers are often sent on an international assignment as a high

potential employee or technical expert in hopes of career advancement (Oddou, 2002;

Tung, 1987), making them prime candidates for mentoring. However, we cannot assume

that mentoring relationships will be the same as those that exist with domestic workers.

Mentors with professional experience may not possess the overseas experience to qualify

them to assist an expatriate to interpret new work roles and norms in the host country.

Some of the challenges of the expatriate learning curve include constant uncertainty of

the appropriate behavior in the context of culturally different social and management

practices, the stress of performing a new job with unclear work role expectations because of rapid deployment, and relocating a residence to an unfamiliar environment (Ting-Toomey, 2005; Thomas, 2002; Tung, 1987). According to Brock & Shenkar (2005) the norms and processes of "managerial styles and information needs vary cross-nationally" (p. 1294). Problems arise when expatriates are asked by management in the home office "to do things that are acceptable in the home culture but not the host culture" (Osland, 1995, p. 50). It is up to the expatriate to figure out how to accomplish organizational objectives without stirring up disagreements with the local co-workers. Expatriates cannot rely on domestic mentors to possess the international experience to interpret and coach them on local, culture specific organization practices and systems, meanwhile the international context introduces ambiguity at every turn (Kowske & Anthony 2007; Mendenhall, 2006; Tung 1981).

When the international assignment is complete, a mentor from the home office might assist in finding a suitable job upon repatriation, offering inside information on upcoming organization changes and opportunities for advancement in the domestic operation. Feldman and Bolino (1999) propose that a home office mentor would be valuable in updating the expatriate on potential job openings to keep him or her on the "fast track." Historically, fifty percent of expatriates do not find their skills leveraged upon return, leaving them feeling unappreciated and undervalued (Baruch, 2002). This statistic represents a huge organization loss in terms of knowledge, experience and social capital, not to mention financial investment in the expatriate assignment.

Multiple Mentor Theory for International Assignees

Mesias and Scandura (2005) suggest that multiple mentors are required for various expatriate development needs and situations. According to the model of expatriate adjustment proposed by Black et al. (1991) there are three major components on an international assignment: pre-departure, in-country adjustment, and repatriation adjustment (Black et al., 1991). Shaffer et al (1999) investigated social support systems (multiple mentors) as predictors of all types of expatriate adjustment in the model. The study tested dimensions of host-country culture, expatriate work role, and group socialization (Black et al., 1991; 1992) and the supportiveness of co-workers and supervisors in dealing with additional determinants of adjustment such as organization culture novelty, logistical support, spouse adjustment, and individual self-efficacy (perceptiveness and interpersonal skills) as they related to organization commitment and intent to quit. However, the findings conflicted with research on the importance of self-efficacy, language ability, and past international experience in expatriate adaptation (Black & Mendenhall, 1990; Johnson et al., 2003; Tung, 1998). Johnson et al. (2003) conducted a survey to explore the effect of expatriate social support on three types of cultural adjustment in the host country: general country adjustment, work adjustment and interaction adjustment (i.e. socialization with the locals). The study found that "it is beneficial for expatriates to form deep relationships (characterized by high closeness, long durations, and high frequency of interactions) with other expatriates but to rely on [host country nationals] HCNs for breadth of information and support" to achieve general adjustment to the host country (Johnson et al., 2003, p. 285). Work adjustment was

facilitated by breadth of social ties with other expatriates and the total number of contacts

with HCNs, while interaction adjustment correlated only to the total number of contacts

with HCNs, not deep relationships with host country colleagues (Johnson et al., 2003, p.

285). Contrary to these findings, Mezias and Scandura (2005) theorized that mentor

relationships for expatriates with their peers would be shorter in duration than with

domestic mentors, and presumably with less depth. Research by Feldman and Bolino

(1999) found on-site mentor relationship contributed to self-reported career adjustment,

but it was not clear whether the on site mentors were host-nationals or other expatriates.

This study found cultural dimensions, for example "power distance," influences

willingness of host country nationals to engage in a mentoring relationship. These

studies did not differentiate between expatriates or inpatriates experiences due to lack of

statistical power of small numbers. The receptivity of host country nationals to engage in

supportive behavior for expatriates, whom they may resent because expatriates are highly

compensated, has been discussed in the literature (Feldman & Bolino, 1999). According

to Shaffer et al. (1999), third country nationals fair better in relationships with host

country colleagues.

Harvey et al. (1999) advocate assigning a formal mentor to aid in pre-departure,

expatriate and repatriation process and that this mentor would possess knowledge of the

host country, home country business and social customs, the expatriate process and the

organization. The mentor could assist the expatriate on different levels of trust and

knowledge: professional, personal, and relational level in learning the business and

technical knowledge, social connections, and institutional politics necessary to effectively

function in the international arena (Harvey et al., 1999). The existence of one mentor to fulfill all of these needs is a tall order, perhaps unrealistic. It would require one person to be a subject matter expert in numerous areas, high level in the organization, with prior expatriate experience in the host country of the assignee, and one with time to invest in mentoring and compatible with the expatriate on assignment.

In addition to mentors having different national and geographic backgrounds from their protégés, Mezias and Scandura (2005) suggest expatriates work with multiple mentors or mentors within a network, who may vary in terms of hierarchical and or lateral relationship to the protégé in the organization. Exploring different mentoring relationships (nationalities and physical locations/distance as well as origin in host country, home country, third country or another expatriate from the home country) in the current study, and whether an expatriate is inbound to headquarters or outbound to a foreign operation, may be relevant to mentoring in an international context.

Formal and Informal Mentors: Benefits to the Protégé

Mezias and Scandura (2005) advocate the establishment of formal mentors so that expatriates receive the guidance they need pre-departure but in practice the immediacy of deployment on international assignments often does not allow time to assign a mentor. Chao (1992) presented findings that informal mentoring relationships showed positive job attributes such as socialization, job satisfaction, and salary. Meanwhile, in a study by Noe (1988b), protégés "reported receiving beneficial psychosocial outcomes but limited career functions (e.g., sponsorship, coaching, protection) from an assigned mentor. Also, a limited amount of time was actually spent interacting with the formal mentor" (p.473).

Scandura and Williams (2003) suggest that more research on formal and informal

mentoring is needed to determine which mentors are best suited to different protégé

needs. Ganster et al. (1986) indicate that the effects of various forms of social support

"has implications for structuring the work environment as well as for better

understanding the dynamics of social support in the stress process" (p. 103). Shaffer et

al. (1999) found that first-time expatriates respond to different forms of support than

more experienced expatriates, "suggesting that those who have been on multiple

assignments tend to rely more on on-site management rather than the home office" while

"expatriates on their first assignment relied less on coworker support [in the host country

office] for their work and general adjustment than did those with more international

assignment experience" (p. 574). These findings indicate the need to explore the

distinction of the expatriate experience of mentors and social support on international

assignment. Research in this area has focused primarily on the quality of the mentoring

relationship and subsequent effects on protégé perceptions and attitudes within a

domestic operation while considering the mentor's gender and rank differences but not

taking into account their cultural background or work experience (Ragins, Cotton, &

Miller, 2000).

There is a broad range of forms of social support available to expatriates.

Caliguiri and Lazarova (2002) divides categories of support provided by different social

connections, differentiating between mentors and family members, colleagues, host

nationals, and other expatriates in offering three types of support: emotional,

informational and instrumental (the latter refers to the support in providing resources to

make decisions or fill specific needs, e.g. sources for knowledge of baby sitters for families, home delivery of groceries, etc.). "While different in purpose, they will all function to contribute to the recipient's psychological and physical well-being" (Caliguiri & Lazarova, 2002, p. 768). Crocitto et al. (2005) proposed a model representing the expatriate cycle of learning, which included gaining an awareness of the cultural and organization norms for doing business in the host country while building social and human capital serving as an information channel between host and home mentors. A framework of the many potential variables involved in the expatriate experience of mentoring is provided in Table 1.

Table 1. Framework of Determinants, Dimensions, and Differences in Adjustment during Expatriate Assignment and Mentoring Roles

Corporate Purpose for Expat Assignment Crocitto et al. 2005; Feldman & Thomas 1992; Kamoche 2000; Shay & Baack 2004	Parent company control of international operations	Organizational culture transfer Organization change	Professional dev of expat Prof. dev of Host Country National subordinates	Technical expertise needed at host location Knowledge transfer
Adjustment factors (Johnson and Kristoff-Brown 2003; Shaffer Harrison & Gilley 1999)	Job role clarity, discretion/authority, conflict, novelty and accurate expectations	Organization org. culture novelty, social support and logistical support from company	Non-work culture novelty and spouse adjustment	Individual self-efficacy, relational & perception skills; Motivation
Phases of Assignment (Black et al. 1991)	Pre-departure	Duration of expatriate assignment	Repatriation	
Dimensions of Adjustment (Adler 2008; Tung 1998)	To Job role	Interaction with HCN's	General culture	Ambiguous loss (Boss 1990)
Mentoring Goals (Mezias and Scandura 2005; Caligiuri & Lazarova, 2002)	Professional Dev/task	Promotion	Job satisfaction	Adjustment/soc. psych Inform., Emotional and Instrumental support
Mentor Role (Carraher et al 2008; Feldman and Bolino 1999)	Professional Development - Career	Retention/intent to quit	Organization commitment	Role model
Mentor/Protégé Demographics (Ragan, Cotton and Miller 2000)	Gender, Age, Race, Cultural background, Nationality	Socio-economic level	Peer/superior level in organization	Host country Home office
Depth of Mentor Relationship (Harvey et al. 1999)	Professional – job oriented	Relational – social connections, style coach	Personal – trust to share political "insider" info	
Type of Relationship (Kram 1985)	Assigned or not (formal/informal)	Protégé initiated or mentor initiated	Long-term, previously existing (before expat assignment) or short term	Relationship (fit) or not (understanding of cultural adjustment)
Organization Effect/Outcome (Shay & Baack 2004)	Personal Change/Role innovation	HCN subordinate personal change/job role innovation	Subordinate rating of expat effectiveness	Expat manager rating of effectiveness on assignment

Summary

In this chapter, a wide range of theoretical developments and practical concerns related to culture, expatriates, and mentoring were reviewed. Mentor research has expanded from the domestic, primarily US, context into the expatriate field to explore how mentoring programs might contribute to employee development on international assignments. Recent theories on expatriate mentoring have applied assumptions, instruments and approaches used to study mentoring of protégés in domestic, western settings to the study of overseas assignments even though these "traditional measures likely need refining" to ensure relevance and validity in the international context (Mezias & Scandura, 2005). According to a directive from Osman-Gani and Zidan (2001), human resource development (HRD) research needs to, "adopt an overarching and fundamental philosophy recognizing that culture matters in training and development and organization development." They argue that, "theories and practices that develop an awareness of cultural context in the workplace will benefit organizations and the field of HRD" (Osman-Gani & Zidan, 2001, p. 456). The next chapter introduces the use of hermeneutics as the methodology to study the hidden meanings in narratives describing the expatriate experience with mentors on international assignments.

Chapter 3

The Methodology

In this chapter, a hermeneutic methodology will be presented as the appropriate approach to interpret narratives from human experience in intercultural contexts consistent with the research questions. The implementation of the research methods and research design will be discussed. Through interpretation of the rich description of expatriates' narrative account of their lived experience, this study attempts to provide a deeper understanding of the significance of mentoring and social support in an international context.

The Research Questions

1. How do expatriates experience mentors on international assignment?

2. What resources do expatriates seek out and/or rely on to support their professional development and adjustment to life in another culture?

Two assumptions about the expatriate experience and mentoring shaped the research questions for this study. First, when studying a phenomenon such as mentoring to gain a deeper understanding of that human experience, the researcher must be open to finding multiple realities of the experience across individuals (Creswell, 2007). Second, the cultural context of the international assignment and native culture of the individual may present varied and nuanced meanings of a mentoring relationship and activities. It follows that a qualitative methodology was appropriate to explore the expatriate experience of mentors and other forms of social support to find new knowledge through interpreting the meaning of mentoring from rich descriptions of international

assignments. The purpose of the study is not to find one objective truth but gather the

meaning of mentors in the situation of a person adapting to a new job and culture.

The Methodology

Hermeneutics comes from the Greek term meaning interpretation of the written

word to bring understanding of text that is in some way unclear. As a methodology,

hermeneutics dates back to ancient Greek civilization and was used in the 17th century to

interpret the meaning of ancient biblical texts and classical literature (Eberhart & Pieper,

1994, p.45). Philosophically, this method of inquiry is rooted in the ontological

assumption that the search for the meaning in narratives describing human activity will

not produce objective truth about the phenomenon described but subjective knowledge

about *human experience* of the phenomenon (van Manen, 2007).   Husserl (1970) used

the term *Lebenswelt* (life world) to refer to the concept of one's perceptions of

experiences in situations in the world, how the world appears to us, and our experience of

our self-identity, physical self, and relationships (Finley, 2008). This is an existentialist

notion and the perceptions under study are pre-language and reflection; it is the study of a

world of personal experience and action, neither an object "out there" nor a concept "in

our heads." As Merleau-Ponty (1962) explains, "There is no inner man [*sic*], man is in

the world, and only in the world does he know himself" (p. xi). Husserl (1970) referred

to this concept of relative existence as "intentionality." Finley (2008) clarifies:

> In the life-world, a person's consciousness is always directed at something in or
>
> about the world. Consciousness is always consciousness *of* something. When we
>
> are conscious of something (an 'object') we are in relation to it and it means

something to us. In this way, subject (us) and object are joined together in mutual

co-constitution… it is a key focus for research…In research, the researcher's aim

is to explicate this intentionality to do with the directedness of participants'

consciousness (what they are experiencing and how). Put another way, the focus

is on the intentional relationship between the person and the meanings of the

things they're focusing on and experiencing (p.2)

In this study, the *object* is mentoring and social support during an international

assignment and the *subject* is the "life world" of the expatriate worker experiencing this

relationship and activity in the situation of an overseas assignment.

Hermeneutic Interpretation

There are different schools of thought on interpretation of narrative texts and

subsequent knowledge generation through hermeneutics. Dahlberg (2008) indicates the

"overall aim of lifeworld research is to describe and elucidate the lived world in a way

that expands our understanding of human being and human experience" (p.37) with the

researcher remaining open to whatever is revealed in the narratives. Dilthey (1976)

credits Schleiermacher with developing the twentieth century hermeneutic tradition,

refining techniques used in interpreting narratives for semantic, cultural and

psychological meaning of texts. Dilthey advocated interpretation of human experience

like a poem. However, Gadamer and Heidegger argued that Dilthey and Schleiermacher

were too positivistic in their philosophic views, rejecting Dilthey's premise that the

researcher's interpretation of the text could produce the true meaning of the narrator (van

Manen, 2007). Gadamer (1989) maintained that researcher interpretation could only

achieve new knowledge in the form of the "fushion of horizons" of the original historical and cultural context with that of the researcher (Gadamer 1989 in Eberhart & Pieper, 1994, p.45). Husserl's concept of intentionality ties in with the Heideggerian awareness of "self and world being inseparable components of meaning" (Moustakas in Patton, 2002, p. 484).

In the current study of expatriate mentoring, I follow the philosophical underpinnings and hermeneutic approach presented by Eberhart and Pieper (1994). They contend that there are hidden meanings in interview texts regarding experiences that are not consciously known to the narrator, requiring interpretation of by the researcher to produce knowledge and understanding of human experience.

> The connecting concepts used in narrative configuration are based on a definition of human action encompassing the key concepts of goals, motives, and agents. The narrative form organizes individual events through a framework of human purposes and desires, which includes the limits and possibilities posed by the physical, cultural and personal environments. Action in the narrative scheme is both purposive (intentional) and purposeful (goal oriented). In narrative, actions occur because of their agents and related to intended consequences rather to the antecedent events. Because actions are intentional and goal oriented, they portray the experiences of the agent in a way that reflects the meaning of the experience (Eberhart & Pieper, 1994, p.44).

Ricoeur (1981) agrees that individual descriptions of a given situation need to be interpreted to bring about a fuller understanding of the human experience. The

philosophy behind this version of hermeneutic methodology assumes that "consciousness on the part of the author of the action is not always adequate to provide a full understanding…interpretation is necessary to disclose the meaning of action as it is often masked by its metaphorical dimensions" (Ricoeur 1977 in Eberhart & Pieper, 1994, p. 44). The researcher accepts the interpretive nature of an expatriate's description as a social construction of the phenomenon (van Manen, 1997) and further interprets themes the descriptions "point out" beyond what the expatriates specifically "point to" in their narratives (Gadamer, 1986 in van Manen, 1997).

Integral to this methodology is the concept of *Verstehen* (understanding). Max Weber first presented this concept in human sciences (van Manen, 2007). It refers to uncovering "empathetic understanding" rather than seeking strictly rational, factual knowledge of human experience (Patton 2007, 51). The epistemology of this qualitative approach is grounded in accepting the subjectivity of knowledge and the acausal nature of human actions described in personal narratives, with the understanding that basic concepts are socially constructed and thus impossible to reduce into purely objective knowledge (van Manen, 1997). Furthermore, Hermeneutical inquiry recognizes that understanding human experience is dependent on "the cultural context in which it was originally created as well as the cultural context in which it is subsequently interpreted" (Patton, 2002, p. 113). According to Eberhart and Peiper (1994):

> Gadamer believed it was not possible to discard one's own cultural context in identifying the author's intentions…. [Whereas] Ricoeur's hermeneutic project contends that human action can go through a kind of objectification, thus, can

become the object for a human science…Recognizing both the cultural and

unconscious structures of human existence…objective meaning of the action is

separated from the intention of the author…[with the assumption] that many

actions of the agent are not clear to conscious awareness. The notion of the

revelatory power of the text allows an objective interpretation capable of

reconstructing the inner connections of the complex actions not known to the

conscious awareness of the agent (pp. 45-46).

Ricoeur's approach places a responsibility on the researcher to remain vigilant of the

implications of cultural differences in narratives about the human experience, which is

particularly relevant to this study.

Phenomenology versus Hermeneutics

Hermeneutics is distinguished from phenomenology in that this form of inquiry

seeks *hidden meaning* in interpreting the narratives collected from study participants'

reflections while in phenomenology, the goal is finding the "essence" (van Manen, 1997),

in other words reducing the explicit and universal meaning of a phenomenon through

analysis and sorting out exceptions (van Manen, 1997, p. 19). Gadamer (1986 in van

Manen, 1997, p. 26) points out that the phenomenological description is the individual's

interpretation of his or her experience, while the hermeneutic methodology uncovers

themes concealed in the description. Patton (2002) acknowledges the murkiness of

different scholarly approaches to phenomenology, philosophically, methodologically, and

analytically (p.483).

Hermeneutics requires the researcher to become instrumental in collecting and analyzing detailed descriptions of experiences of a phenomenon (van Manen, 1997). The role of the researcher involves collecting the data, in this case, through semi-structured interviews, sorting and resorting of the data captured in narratives in an iterative process, and extracting categories of description that form knowledge of the experiences (Patton, 2002). The interview protocol (Appendix D) was designed to elicit ways expatriates ascribe meaning to their culture-learning through interactions with co-workers, other expatriates, and supervisors in the home and host country, for support on an international assignment.

Past research on expatriate mentoring primarily employed the empirical methods of testing hypotheses for statistical significance of, for example, the mentoring relationships as predictors of adjustment, expatriate effectiveness, assignment completion, and organizational commitment (Carraher et al., 2008; Feldman & Bolino, 1999; Mezias & Scandura, 2005). In the interpretive realm, the significance of the findings is determined by whether the narrative analysis is meaningful to the field of study rather than the statistical strength of the data (Polkinghorne, 1988). The goal of the researcher is to find "the consequential in the inconsequential, the significant in the taken-for-granted" (van Manen, 1997, p. 8).

Qualitative research has not been utilized extensively in expatriate mentor research. Yet, to capture the context and many factors involved in cross-cultural experiences, Sackmann and Phillips (2004) advocate research methodologies that gains access to the "intercultural interaction perspective… resulting in thick descriptions to

reveal insights about the emergence and negotiation of culture and shed light on intercultural communication in the workplace" (p. 275). Zimmerman and Sparrow (2007) encourage qualitative studies that enable researchers to analyze cultural context and process orientation: "we need studies conducted in more realistic multicultural contexts, and investigation of the dimensions that emerge within groups which helps to characterize how they deal with a particular context" (p. 67). This study is an attempt to offer a window into the reality of mentoring and professional development on international assignments in light of the multicultural context of expatriate work.

The Research Design

I selected several US multinationals and an Indian multinational enterprise to provide access to participants in the study by inquiring with human resource managers at each company about the willingness to distribute my research proposal to solicit voluntary participation of potential participants. Once the human resource professional gained approval through the necessary channels, the HR manager sent an email, blind copying recent expatriates, with a summary of the doctoral research proposal indicating the researcher's affiliation and approval for research by the University of Minnesota (Appendix A).

Participant Selection

Thus the sample of participants in the study was generated using a purposeful, criterion focused, nominative process (Patton, 2002). Fifteen participants self-selected to be interviewed, resulting in a final purposeful sample of thirteen expatriate workers providing narratives of their experience to the researcher.

The participants in the study were on current or recent expatriate assignments. The criteria given to the HR professionals who sent emails to prospective participants were to include expatriate workers on assignment in the past four years, either inbound to work in the US (non-US citizens) or outbound to work in non-US operations (US citizens). In the case of the three Indian participants in the study employed by two Indian companies, the email was forwarded from their US client organization. The proposal summarized the basic purpose of the study (to learn about their expatriate experience), the method, (through open ended interview questions in one forty-five to seventy-five minute interview, in English, and response to another set of questions in writing, via email), and the result (to produce a report from the findings that the author would share with them, the company, and academic colleagues), clarifying that anonymity of companies and individual participants would be preserved (Appendix B). The proposal confirmed that the study was approved by the University of Minnesota Institutional Review Board (Appendix C).

Data Collection Procedure: The Interview Process

The employees in the population of expatriates at each company had the opportunity to respond to the proposal, ask questions, and agree to participate with me in the study or not. The total target number of study participants was between twelve and fifteen expatriate workers; which is appropriate for a hermeneutic study (Patton, 2002)). There were thirteen participants in the final sample, after attempts to schedule two of the original fifteen participants resulted in many cancelled interviews owing to extraordinarily busy schedules and long hours on their assignments in Asia.

I attempted to develop rapport with all participants starting with my reply to their email in response to the proposal (Creswell, 2007; Patton, 2002). We scheduled a time for the interview at each individual's convenience, in a public location close to their place of work or at their office. Interviews were conducted by telephone in circumstances that prevented the participant from meeting with me in person. Participants were given the option of being audio taped during the data collection process to ensure accuracy. I explained that I understood some people are not comfortable with being recorded and I could alternatively take copious notes. All participants permitted me to record our interviews.

Upon meeting, in person or over the telephone, I gave the participant a short, verbal summary of my background and reminded him or her that their anonymity would be preserved (and that of their company) to minimize risks to them personally and professionally from participation in the study. The benefits were a time of reflection, as the expatriates recounted their story, which they each indicated was meaningful to them after we completed the interview. Also, I offered to send them a copy of any article produced from the dissertation once the research was complete. Participants responded to semi-structured interviews based on the protocol in Appendix D. Field notes were taken during interviews and later used to verify audiotape transcription.

The interview questions were developed in four different areas: demographic, introductory information, the adaptive process on assignment, formal mentoring and informal mentoring, and conclusion. The interview questions were developed during my coursework in my doctoral program, dissertation proposal process, literature review, and

a pilot study performed with expatriates in 2008. The data collection through semi-structured interviews allowed me to probe expatriates about their experiences on international assignments while not informing them explicitly about the study questions regarding mentors. I wanted to let them tell me if they considered their social and work interactions "mentoring" and allow other themes to emerge. This inductive process is typical and recommended for qualitative inquiry (Creswell, 2007; Patton, 2002).

Prior to conducting the interview, I presented the option to the first couple of participants to write narratives of two or three critical incidents describing events (critical incidents) in their host country that presented unanticipated cultural differences prompting their recollection of perceived intercultural adaptation experiences. I gave up on this approach because it did not elicit responses and the participants did not grasp my intent to collect critical incidents about their intercultural experience, which I intended to follow up in the interview. I surmised that, without building some kind of rapport with the expatriate, they did not easily share stories, especially ones that showed their lack of cultural understanding or might be embarrassing. So I collected their stories in face-to-face or phone interviews.

Allowing for flexibility during data collection is known as "emergent design" (Creswell, 2007) and reflects the adaptability necessary to gather information for a qualitative study. This approach allowed me to ask preliminary questions, prompting the participants to conjure up memories of their transition to their international assignment, and enabling them to recount incidents in which they confronted the ambiguity of cultural norms in the host country affecting their daily life and work roles. This initial experience

in my interaction with participants in the study was affirmed by Fetterman's (1998) assertion that, when conducting research through a survey, "because of the distance between the researcher and respondent…Knowing whether the researcher and the respondent are on the same wavelength, sharing common assumptions, and understandings about the questions, is difficult—perhaps impossible" (Fetterman, 1998, p. 54). Sending the request for information via email was not as effective as conducting the interview to gain access to the expatriate reflections of their experiences on assignment. This showed the advantage gained through qualitative inquiry: interaction with the participants enables the researcher to clarify the meaning of responses about their motivations and perceptions of an experience (Wolcott, 1999). I encouraged participants to share detailed descriptions of their experience to follow the research methodology calling for "concreteness" of the data and not just reflective conceptions or abstract views they thought about their experience of the phenomenon after the fact (Finley, 2008).

I found another advantage of the interview method was clearing up potential language differences and misinterpretation of word meanings in our interviews. When difficulty in understanding words arose, I asked for clarification, as did participants with me, during the interview process. Member checking is not appropriate in hermeneutics because the interpretive themes are not always consciously known to those interviewed (Eberhart & Pieper, 1994), but I recorded the research process of formulating questions and my thinking behind follow-up questions during the interview process. A potential list of interview questions is presented in Appendix D.

Bracketing

Husserl (1913 in Patton, 2002) introduced the term bracketing to describe the analytical process of holding a phenomenon up for serious inspection apart from any preconceived notions by the researcher. This is an essential step to keep biases in check while interpreting data to allow themes to emerge from the participant's view (Creswell, 2007; van Manen, 1997). Although an awareness of the historical and cultural context of the participant and the object they are describing in their interview might enable the researcher to see multiple realities and discover "new differentiations and interrelationships in the text, extending its meaning" (Kvale, 2008) the converse could be true. Husserl (1931) did not advocate that the researcher be objective but to be open to understanding the world of the narrator, unencumbered by existing theories, paradigms, models, knowledge and scientific conceptualizations of the object and the participant's experience of it. To prevent myself from being influenced by extensive research findings on the mentoring experience, I did a minimal literature review until after I conducted interviews and analyzed the data. My original literature review was to determine the extent of the research on expatriate mentoring, of which there was as small collection and only two used qualitative methodologies. The initial literature review did not delve into the theoretical findings that define mentors or the mentoring experience for protégées.

One goal of the study was to capture the cultural variations of the expatriate experience. I was cautious to remain aware of my cultural perspective compared to the cultural lenses of the participants, enabling me to see a breadth of cultural interpretations in the narratives (Creswell, 2007). As a result, during the analysis, this methodology

proved to successfully identify the subtleties of qualitative differences in the expatriates'
experiences with mentors affected by nuances of participants' differing cultural
backgrounds on international assignment.

Reflexivity

I maintained a journal with reflections of my perceptions and possible biases in
interpreting the meaning of responses and my interaction with individual participants
from various backgrounds during data collection. Prior to and during the analysis for this
study, I made note of my pre-understanding or assumptions of how I think expatriates
conceive of their mentors during their assignment and what affects I think this
relationship may have on their experience in hindsight while they are recounting stories
about their expatriate assignment. Journaling is a step used by researchers to reveal
assumptions that could affect interpretation of the data, also mapping "key decision
points" in a researcher's thinking during data analysis.

In depth hermeneutic analysis involved immersing myself in the life world of the
participants. I found myself consuming the maximum amount of narrative data that my
mind could hold and encountering the embattled research analysis experience van Manen
(2007) describes as a "certain irrevocable tension between [finding] what is unique and
what is shared, between particular and transcendent meaning, and between the reflective
and the pre-reflective spheres of the lifeworld" (p. 245) This process presented themes
that were most meaningful to the field of study.

Coding the Data

An experienced transcriptionist and I transcribed the audiotapes of interviews verbatim. I proofed the transcripts for accuracy against the recordings by listening to each tape two or three times, and, when unfamiliar terms were used, checking my notes for clarification of meaning and spelling. I then conducted content analysis of the transcripts and field notes. I tried to remain open to the phenomenon was the narratives presented it through out the research process. Dahlberg et al (2008) described the stance of openness as "the true willingness to listen, see, and understand. It involves respect, and certain humility toward the phenomenon, as well as sensitivity and flexibility" (p. 97).

One of the key decisions in the data analysis process was color-coding each individual expatriate narrative transcription. This enabled me to keep track of the context of the meaning of individual expatriate reflections while sorting them into common themes across the collective group. The initial themes for this study were sorted by physically cutting up the transcribed text (hard copy) into pieces of narratives related to mentors and the intercultural adaptation process. I put quotes into categories of content, keeping them in context of the participant's reflection, after reading entire narratives several times to become familiar with the concepts relayed in the interviews. I looked for variations and similarities of expatriate conceptions of mentors and resources relevant to the research questions (Akerlind, 2005).

Analysis of the Data and Triangulation

Content comparisons were conducted between narratives from various expatriates and interpreted for over-arching themes about the expatriate experience, being mindful of

and keeping a written record of emerging logical relationships between content from various participants (Patton, 2002). The hermeneutic process requires referencing back to original transcripts as content is sorted into categories, so I had to verify context accuracy of the meaning of the quotes relevant to the experience with mentors. Analyzing data in hermeneutic research is an intensely iterative process. My adviser reviewed my analysis and the transcripts to verify I was true to the premise of the methodology and the narrative content in my interpretation. She reminded me not to jump to conclusions and let the data speak.

Peden-McAlpine (2008) suggests that qualitative researchers "isolate and differentiate" themes found in the data. She encourages the researcher to *question* what the studied phenomenon is, what themes extracted from the data are essential to it and what themes do not define the participant's experience of the phenomenon—if a theme is removed, does the expat's perception of mentors during intercultural adaptation lose fundamental meaning? This is one guiding principle I kept in mind during the analysis to remain true to the meaning of the narratives.

In this study, the phenomenon of mentoring may have involved the expatriate's behavioral, attitudinal and cognitive changes on assignment, so descriptions of a range of experiences were coded. Categorizing descriptions of thoughts, attitudes, and behavior of expatriates was difficult as these experiences were described in different ways and different levels of detail (Creswell, 2007). I decided against using software in this process since there was a risk of losing the contextual subtleties of the voices of participants by using technology to categorize their reflections.

While finding themes and relationships between dimensions of mentoring and other themes that surfaced from the narratives, I recorded the questions that arose about the experience of the phenomenon, possible responses to these questions, as well as my reflections in writing about my thinking during the research analysis. It was my goal to build a structure and recheck it for alternative possible themes and structures, on mentoring relationships in their adjustment process. Meanwhile, I kept the voices of the participants in mind throughout the analysis process, to preserve the authenticity of the data in the findings. As Finley (2008) points out:

> As researchers, we need to strive, explicitly, to understand some of the connections by which subject and object influence and co-constitute each other. We need to acknowledge both our experience and our experiencing as researchers as well as be focused on the Other and their experience and experiencing…
>
> Often researchers will aim to identify significant themes or narratives emerging from the data. Each type of analysis and way of presenting the data simultaneously reveals and conceals. Different analyses highlight particular nuances and indicate various immanent possibilities of meaning as *figural* against a *ground* of other possible meanings. However rich and comprehensive, any one analysis is, inevitably, incomplete, partial, tentative, emergent, open and uncertain. The analytical process invariably involves a process of reflective writing and rewriting. This process aims to create depth: multiple layers of meaning are crafted to lay bare certain truths while retaining the ambiguity of experience (p. 6).

A list of the expatriates' company origin and destinations are listed in Table 2.

Confidentiality and Adverse Impact

The identity of the participants in the study was and will be held in confidence. All tapes, field notes, and transcripts are stored under fictitious names to ensure the anonymity of the participants and their employers.

Participants were informed of risks and benefits of the study in accordance with University of Minnesota Institutional Review Board guidelines. The participants were informed of my intention to publish findings from the study and that anonymity of the participants will be preserved. Tapes are to be destroyed ten years after publication of the findings.

Rigor of the Study

As in any qualitative study, the data collection and analysis process may be influenced by biases of the researcher. These biases could involve the goal of the data collection, the perceived power relationship with the participant, and stress, discomfort, or anxiety that the research process induces for either the participants or researcher. Any of these factors could affect behavior or field notes during data collection (Wolcott, 1999). To ensure rigor, I engaged in practices to identify reactive effects, consider these effects on collection of data, and revise subsequent data collection practice through journaling, bracketing, memo writing, adviser review, and transcript checking. The content and Variation of narratives in this study may have been affected by the participants'

Table 2. Expatriate Nationality, Organization National Culture, Length of Assignment and Prior Experience Living Overseas

Expat No.	Nationality of Expat	Org Home Office	Expat Origin Office	Host Country Assignment	Length of Assignment	Past Expat experience	Level in Company	Formal Training	Formal Mentor	Lang in Office
1	US (TCG)	US	MN, US	Switzerland	1 yr	no	Market Research Asso.	A online	no	ES
2	India	India	Kolkata, India	US	4 yrs	no	Info. Tech Analyst	no	No	S
3	India	India	Delhi, India	US	3 yrs	no	Associate Consultant	no	No	S
4	India	India	South India	US	3 yrs	no	Business Analyst	A	No	S
5	US (TCG)	US	MN, US	China	1.5 yrs	no	HR Director	no	No	ES
6	US	UK	NY, US	UK	5 yrs	Missionary	Assoc. Attorney	no	No	
7	US (TCG)	US	MN, US	UK & India	1.5 & .5 yrs	No/yes	HR Director (Quality)	Yes, R	No	ES
8	US	US	KS, US	Venezuela	3 yrs	No/yes	Manager	no	No	S
9	US	US	Chicago, US	Japan	3 yrs	yes	Consulting Partner	Yes, R	No	ES
10	France	US	France	US	5 yrs	yes	Controller (Division)	no	yes	S
11	US	US	MN, US	France	1 yr	yes	Manager (Operations)	no	No	S
12	US	US	MN, US	India	1 yr	no	IT Training Consultant	no	No	ES
A	UK	US	Nederlands	Neder. & US	3 & 2 yrs	yes	Strategic Analyst	Yes, R	yes	

Expatriate's Origin Office = Office location where the expatriate was working when s/he received the assignment to go to host country**.**

Formal Training: A = available at the time of assignment but not used, R = received training.

Lang: Expatriate assignment required working in a second or third language = **S**; **ES** = English Speaking office in a society for which English is not the dominant language spoken by the general population. (In China, Japan, India, and Switzerland, host country nationals speak to each other in their own language, even though the office management conducts meetings and supervises the operation in English. In India, English is the official language of business, but it is noteworthy that the expatriates cannot understand some work conversations among employees.)

Key: **TCG** = Third Culture Growing up (An individual raised by immigrants, immigrated with parents, or had multiple cultures in home as a youth)

demographic characteristics, organization practices, individual motivations for participation in the study, and location of the expatriates interviewed during the research timeframe (interviews were conducted between December 2009 and July 2010).

In this study in particular, cultural differences made sensitivity to the values and norms of the participants during the data collection process a priority (Creswell, 2007). I did not perceive discomfort on the part of any participants despite occasional misunderstanding of accents and terminology during interviews. Generally participants were enthusiastic about sharing their stories and several noted that they had not taken stock in their experience as the interview primed them to do (Patton, 2002). Thus the participants' opportunity to reflect on their expatriate assignment was cathartic, insightful and enjoyable for them personally, as if this study was a welcome opportunity to share their experience and new revelations of lessons learned on their international assignment.

Ethics and Human Relations Implications of the Study

The ethical boundaries for qualitative research with expatriate employees are not as well defined as quantitative and experimental research. The qualitative researcher has access to people's personal views, and potentially private lives, and family information, which requires additional sensitivity. Engaging in this process exposes the researcher to ethical concerns that cannot be anticipated, such as a person revealing the need for medical or counseling interventions that the researcher is not qualified to perform or the subject's family engaging in practices that are illegal or culturally immoral in American society. The author needs to be prepared to access the necessary resources in the event that these situations arise (Morse, 1994).

At the same time, the IRB requires the study participants to be informed about the purpose, need and possible questions to be answered by the research, without pressure to participate in the study and with the understanding that the subject may withdraw from participation at any time. I conducted research inductively at times, to clarify the question, so in this case, the full disclosure of the question behind the research was impossible until interaction with the sample revealed new meaning for the course of the research (Creswell, 2007).

The culture and religious beliefs of a participant from outside the US may determine whether interviews may be conducted in a private place based on family relationship and gender. I addressed this issue by offering to meet with the expatriate at a public venue or the participant's office. Tape recording may be uncomfortable to some people and I respected that position, agreeing to take field notes exclusively or conduct the interview by phone if these issues were of concern.

After meeting with an expatriate, I realized that my role as researcher could become blurred as a friendship could develop. It is not unusual for a researcher to be cordial and to reciprocate in sharing information about one's background to introduce the research. This introduction is conducive to the expat sharing thoughts that s/he may not realize are included in the notes. This example shows the type of ethical dilemma that is unique to qualitative research. Care for the subject's privacy, dignity, personal reputation and feelings were taken seriously, not only for the subject's sake but to uphold the honorability of field research and the University of Minnesota. I was sensitive that participants in the study should not feel "used" to advance my research career.

Finally, individual careers could be affected, negatively or positively by published findings. The study could reveal information that a company has not focused on in the past or to which it does not devote resources currently. This study could benefit the company bottom line by improving systems related to expatriate assignment, reducing expatriate stress, and improving assignment completion and repatriate retention. These potential benefits and risks were revealed and discussed with participants and human resource contacts at the outset of the study. Additional risks did not present themselves during the study, if they had, these would have been weighed against the benefits of the research. The findings were presented in a balanced way, as much as possible attempts were made to avoid biased judgments that may present any participant in a political or condescending way.

Summary

This chapter explained the methodology of hermeneutics, its appropriateness in investigating the research questions, and application to the research process of this study. The research design was outlined as well as the rigor of the study and ethical concerns of working with human subjects. The next chapter presents the findings based on the hermeneutic analysis of participants' narratives about their experiences with mentors and social support during their international assignments.

Chapter 4

The Findings

These findings are an interpretation of the narratives of thirteen expatriates' experiences with mentoring relationships during international work assignments across a wide spectrum of cultural contexts and expatriate nationalities. The participants in this study were international assignees from companies based in the US, India and the UK assigned to work in China, France, India, Japan, the United Kingdom, the United States, and Venezuela. (Details on the participant nationalities, organization home office location, host country, and length of assignment appear in Table 2 in the previous chapter). This research project focused on the following questions:

1. How do expatriate experience mentors on international assignment?

2. What resources do expatriates seek out or rely upon to assist in their adjustment to work and life in another culture?

From these questions, three major themes emerged. The first theme focuses on mentoring as a cultural experience. The expatriate description of mentor behaviors and purposes were bound by national and cultural norms of individual expatriates. The definition of mentoring was not universal across expatriates from different cultural backgrounds. The cultural perception of mentors is influenced by the expatriate's experience of: organizational hierarchy and chain of command, the style of performance feedback, direct or indirect communication styles, the cultural acceptance of a formal mentoring program, and the cultural concept of performance.

The second major theme was the international assignees' experiences of

developing a strategy for coping with the chaos they confronted during their overseas work assignments. Two primary categories were found in this theme. One was the experience of seeking experts on the host country with prior expatriate experience to prepare new expatriates and advise them during their international assignment. Second, expatriates found ways to supplement or fill in when there mentoring needs were not met. Social contacts at different points in time reduced expatriate anxiety and uncertainty encountered daily throughout international assignments. Human resource and relocation consultant professionals offered assistance upon arrival complemented by expatriate, family member, and host country nationals, in a mixture of ongoing support and immediate responses to crucial information needs in the host country environment. Learning to adjust to the host country was a matter of asking for help in putting together pieces of the puzzle of an international assignment.

The third major theme was the changing roles of the expatriates on their assignment, from culture-learning and work socialization to mentoring others on international assignment. Their roles fell into three categories. First, as an "outsider" to the local operation, "figuring it out" on their own when mentors were unavailable or unwilling to directly assist expats in understanding the different challenges of working in a regional operation. In this category, expatriates' narratives conveyed the resilience and confidence that they developed, despite frustration and delays that were natural consequences of not knowing what to do or how to get things done on assignment without guidance about different cultural norms. Second, the analysis revealed the experience of expatriates mentoring host country colleagues through exchanging

information in an unplanned, reciprocal learning process, enabling expatriates to accomplish their assignment objectives as they interacted with and often acted as change agents in their new work group. Expatriates provided technical expertise, organization culture transfer and implemented management controls while host country workers supplied insight into the existing processes shaped by the regional culture. Finally, after learning knowledge specific to their overseas operation, expatriates with management responsibilities mentored the leadership in the home office on cultural differences that justified adjustments to corporate policy, procedure, or practices to accomplish work in the regional culture and business environment. Expatriates felt they could offer valuable insight into cultural awareness in the organization based on their experience. They were prepared to mentor future expatriates and corporate leadership as they made decisions for managing international operations and organization development. Each of the three themes will be dealt with in turn in this chapter.

Theme One: Mentoring Experiences are Rooted in Culture

The expatriates in this study experienced cultural distinctions in the behaviors and purposes they attributed to mentors depending on their nationality. Mentoring is defined differently in different cultures. Although all thirteen expatriates were asked if they had a mentor during their international assignment, only two participants in this study were assigned formal mentors on their international assignment, and the value of the relationship was recounted by only one of them. The concept of mentoring was not universal among expatriates from different cultures in the study. Expatriates who attempted to implement a U.S-style mentoring program in their Asian host countries and

found that, even though the organization culture was strong transnationally, the mentor

experience offered was not familiar to the national culture. The main differences centered

in the cultural values attached to hierarchical relationships, direct and indirect

communication styles, qualitative feedback, and the purpose of a mentor. The following

categories represent the culturally different qualities expected of mentors by various

expatriates in this study.

Mentoring Means Learning from an Expert

An Indian expatriate assigned to work in the US by his Indian firm explained his

concept of mentoring. Mentoring to him was an apprenticeship type of experience with

his Indian manager who instructs him on problem solving skills and improved technical

approaches to work tasks, reflecting the importance of hierarchy in India. The expatriate

observed that, in the US, the subordinate relationship is like a "younger brother," in a

family. The US manager is cordial and appreciative rather than authoritarian. Although

the expatriate from India found the US management style contributed to a positive work

environment, he expected a mentor to help him improve his work skills not so much offer

encouragement.

> I will give you an example of my boss [in India mentoring me when]… I was
>
> senior team lead.…he said, 'You decide how to do it.' I needed to get this
>
> [programming project] done…even if it means 24/7 for five days…but it wasn't
>
> realistic. Something I cannot expect [to accomplish in the allotted time]. I went
>
> to him and said, 'This is how I think this can be done…I realize I cannot.' And
>
> my boss says, '[Your approach] will take 10 hours/day. This is better

[demonstrating another approach]. This [your way] is a longer approach,' he tells you.

Your [US] boss here will never say, 'You have to get it done and tell you how to do it'…[In the US] the best thing is how people, the way they appreciate your work. Even if you do a small thing…that…is lacking in India. Appreciation is not that much in India because the expectation is pretty high in India…The way these [US managers] appreciate my initiative. You are given the opportunity to take initiative in India. Your boss in India is authoritative…Here [in US] your boss listens to your situation. Here you are not taken as a subordinate they take you as a younger brother…they appreciate you a lot

(An Indian expatriate to the US, working for an Indian firm).

Another expatriate from India felt that the positive feedback in the US business environment instilled confidence in her but she did not associate a mentor with the opportunity to gain increased responsibility and promotions on her assignment. She did not consider this experience "mentoring." She attributed her promotion and salary raises to her physical presence in the US and more direct client contact than when she worked "off shore."

You always have the upper hand when you are on shore [with the client]. When you are here, [in the US] you would get more responsibility. You are appreciated more here. Your confidence improves because you are appreciated more. You rise more as far as promotions are concerned and salary hikes; and off shore you get less promotions and salary hikes…

I had a manager here…mentor? No, it was more the people I was staying with

(An Indian expatriate to the US, working for an Indian company).

The expatriate experiences with feedback varied depending on the cultural background of the expatriate. Positive feedback was interpreted as brotherly guidance by one Indian expatriate (quoted earlier in this section) and perceived as not "honest" by an expatriate from France. While the expatriate experience with negative feedback in eastern societies was perceived by Chinese nationals as instigating conflict and as overly critical by employees in India, the expatriates from western cultures (the UK and France) sought this type of feedback as illustrated in the next section.

The Role of the Mentor: Feedback is a Cultural Concept

An expatriate from France who was on assignment in the US explained that his managers frequently told him he did a "good job" but he was uncertain whether they were truly impressed with his performance or simply being supportive. His experience of this positive affirmation was confusion. He was seeking specific, honest feedback on his work performance and was uncertain the meaning of this type of communication.

> The negative in management [is] sometimes it's hard to know when [you're doing] a good job and what's not a good job. There is a tendancy to say 'good job'..being supportive …nothing wrong with that…but you need to know [how to improve for career development]   (Expat from France to US).

On the other hand, three US expatriates found the reverse experience during interactions in China and India. The US expatriates in China, India and Japan felt

that indirect, high context communication style is required for mentoring in these

parts of Asia. Based on their experience, explicit and negative feedback would cause

hurt feelings and confusion in China and India.

> That was hard... you know, negative feedback, especially…China wasn't as bad,
>
> though, as other countries I've worked in…In India, oh my gosh, they wouldn't
>
> say anything bad about anybody. And it's like, [I would tell them], 'it's not bad,
>
> it's developmental, it's constructive.' But it's like [their reaction was], 'No.'
>
> Especially if it was upward feedback. And in China it was a little bit better, but
>
> some people did struggle with how to make it meaningful
>
> > (US expat to China who had done business in India).

The themes of different cultural expectations for mentors evolved from several US

expatriates explaining that their expectations from a mentor relationship was totally

different and even unacceptable or at least hard to communicate in another cultural

context.

Misunderstandings Can Lead to Hurt Feelings

An expatriate from the US who went on assignment in China recognized the

cultural differences between the two societies. He provided an explanation to host

country colleagues and subordinates of the benefits of the US mentoring process,

which was core to the corporate culture of the organization. He revamped corporate

training materials to work within the cultural values of the participants in order to

establish a "performance-based" corporate culture in China to resemble the

organization culture in the US. Acceptance of the US notion of mentoring was not a

simple matter in China. The expatriate described his experience in attempting to

instill the value of "constructive conflict" and "upward feedback" to Chinese

managers as an integral component of the mentoring process.

Introducing this concept was a huge challenge. The expatriate attempted to

change training terminology to conform with cultural norms of the Chinese and

Taiwanese and introduce the concept that providing constructive feedback to one's

boss or a peer could be a positive experience. The host country colleagues had

difficulty seeing how this intervention would result in anything but bad feelings

between the participants. In the host country worker's view, this aspect of mentoring

would cause career damage rather than career development. The expatriate makes

the observation consistent another expatriate to India that direct, "constructive"

feedback is not acceptable or "meaningful" in these cultures.

> Conflict management was a classic one where it was just completely different
>
> how they approached it [different from US]. [US training] would start with
>
> the philosophy that healthy conflict is okay…Whereas in China the whole
>
> word conflict …healthy conflict doesn't make sense. Basically, conflict is
>
> bad. So we even changed the word. I can't remember what we changed it to.
>
> But we even changed the titling and changed the whole course name, like
>
> "win-win"

<div align="right">(From a US expatriate to China).</div>

The US expatriate in China speculated that some of the resistance to mentoring was

rooted in historical assumptions about measures for organizational and individual

performance. Traditionally, China was not a meritocracy. Seniority in the organization had been the basis for promotion and rewards so there was no incentive for changing work behavior to improve productivity. Patronage is not consistent with current US business practices but is prevalent in other cultures emerging as leaders in transnational business in recent decades. Although this US expatriate observed that the new generation of worker in Shanghi understood the performance-based system of a US company, the qualitative aspects of performance that are often the focal point of career mentoring did not fit the Chinese paradigm and the relevance of performance improvement was difficult to communicate and implement in China.

> Because the state-based organizations, the traditional Chinese organizations it …was all about your classic seniority, and it's not performance-based. But most of the employees that we had [in Shanghi] were exposed to multinationals, and it was a little bit easier, I suppose. So I don't know if it's in native culture or what, but the part that even those folks struggled with is easy because you get them the metric and it's very quantitative. It *was the qualitative performance criteria that they struggled with.* So [the coaching would go like this], 'are you an effective communicator?' And, 'why we think you're not; and these are the things that you need to improve.' Those are the things that really confused them. But they'd say, 'my sales target was 1 million, and I made it. So what's the problem?' [The manager/mentor response would be], 'Well, you pissed everybody off while you did that. So, how do we improve that?' And they're like, 'oh.' So that behavior

based, more qualitative side of how you get to those results was a huge challenge

for us. And I think that part's probably not part of their culture

(US expatriate to China).

The experience of reverse mentoring and "constructive conflict," which has been

embraced by several US companies represented by expatriates in this study, was not

a concept easily understood within the values of hierarchy and respect for authority

by employees in eastern cultures.

Cultural Misunderstanding of Mentors Can Get in the Way of Development Goals

One expatriate from the US was assigned to provide "corporate culture"

training to the India office, including instituting the US version of a mentoring

program in India. The Indian employees simply did not have the same expectations

of a mentoring relationship as US workers in the home office. In particular, the

notion of approaching a manager for specific career coaching in a hierarchical

culture was unfamiliar and even disrespectful and thus unacceptable within Indian

cultural experience. The US expatriate sought metaphors to convey his experience

of work mentors to his Indian colleagues. He used the experience of an Indian

grandparent sharing life lessons with grandchildren in a multigenerational Indian

family context to explain the mentor concept used for career development in the US

organization. The mentoring relationship in this US organization included direct

feedback, but in India, *indirect* communication is the norm. Thus, the culturally

accepted Indian communication style obscured the fundamental premise for and

experience of mentoring as it is experienced in the US.

They will never interrupt the chain of command…The challenge of managing

upward…We are very direct in the US. [In India, people] will go around and

around… they will never get right to the point because that would be rude.

We do it and have a structure for…career mentors [in the US office]…They

don't do that naturally, because [in India] they are very hierarchical…Because

that would be disrespectful, you don't ask your boss [for advice in India]. It's a

foreign concept for them, not a natural thing for them *at all*. So I would translate

it to make sense in their culture, 'Don't you work with your friends?… Your

grandfather…someone who can teach you something?' We taught them this

whole concept of mentoring…They are very competitive. And the idea of

challenging upwards? Never. Never challenge authority. It rocked their minds

(A US expatriate in India).

The challenge of implementing the US mentor practices were not unique to Asian

societies, such as China and India. One US expatriate offered to act as a mentor for a UK

employee who needed some coaching in the UK operation. He experienced a general lack

of awareness among his colleagues in the UK about the mentoring process.

Mentoring was a US notion and a foreign concept in the UK operation where an

expatriate was sent with his US company. In the UK office, neither the senior manager

nor the employee was familiar with the experience of mentoring with the intent of

assisting an employee with specific performance goals. The expatriate explained his past

experience of mentoring in the US, where the protégé requests feedback and guidance

from a mentor. The UK employee did not know how to engage in the mentor experience,

so the US expatriate initiated his mentor experience in the UK by supplying his protégé

with professional development goals and advising the employee on work tasks and

decisions.

> I was a formal mentor in the UK to one individual and for the most part I
>
> provided him with the things he should be thinking about in lieu of him having
>
> prepared questions to ask of me. I found mentoring in the UK to be much less an
>
> understood process than here in the US. I say this because when I approached the
>
> manager of the individual I mentored to explain what service I could provide as a
>
> mentor to this individual, this was not a process his boss had thought of to provide
>
> help for this employee. The employee was ambitious and very motivated but he
>
> had made a bad judgment decision [at one point] and was being moved to a
>
> different role as a result of his action. I offered to mentor him as part of this
>
> transition. The employee was very unfamiliar with the term mentoring, also, and
>
> I had to explain to him, first, what the program was about, and that it was a
>
> program that would assist him (hopefully) through the process by me providing
>
> my experience guidance   (US expatriate in the UK).

The experience of the US expatriate in the UK challenged his assumptions about the

experience of mentors and protégés in another western culture. Mentoring simply was

not institutionalized as a program nor were roles defined as he expected based on his past

US experience. This experience of a US expatriate finding resistance to the US concept

of mentoring occurred in Europe as well as Asia.

Learning Unspoken Rules for Mentors

One expatriate was assigned to work on a process improvement project in France. This expatriate found that host country employees did not accept her experience and expertise as authority to coach them on process improvement. She discovered the process worked better once she developed allies in high-level positions in France. She needed to tell the employees that the French managers endorsed her role in the local operation to make headway on improvements. Even then, the managers and employees resisted her coaching by the expatriate for performance improvement.

It's hard to get anything done directly, and if you tried, the people who were responsible for those areas felt like saying, 'Well, that's my area, and I should be making those improvements'. Okay, then when are you going to do it? They know that there are problems, but they're just not taking steps to make improvements (US expatriate to France).

The French employees would not receive advice from an expatriate as a mentor without authorization through their manager, even though the expatriate was sent by the US corporate office to perform this role.

Although US expatriates observed a different perspective of mentoring held by Asia and European colleagues than generally held in the US, the following description shows that one Indian expatriate embraced the US concept of mentoring once he was living in the US on assignment for a couple of years.

The Experience of Being Coached: East/West Communication Style Differences

An Indian expatriate inbound from an Indian company to work with a US client appreciated the professional development he experienced with American mentors on communication style for business. His adaptation from indirect to direct communication style took effort and advice from relationships developed over time with peers in a US MBA program and US executives whom he trusted. This kind of cross-cultural mentoring relationship did not happen overnight. The Indian expatriate tells about his experience of the differences in communication style and the mentoring he experienced to calibrate his communication style between the US and Indian cultural nuances.

America is a very direct culture but people are very sensitive…That's the balance that you have to learn; I realize this outlook…I've lived here a while, and in the past year I learned a lot…I see it now…You get exposed to people who are senior executives and people who have done well…There is nuance that I never heard or was aware of…That's the mentoring to the level now I feel I have some good relations in consulting…They are senior level. I am smart, I'm analytical, I've done well. What they are teaching me now is you have edges you have to take care of…or just avoiding the conflict…some things you never think that will be taken as negative or inflammatory…Then [if you make mistakes in communication]… there's a point when people don't trust you anymore…It's an opportunity for improvement…The latest mentoring I feel like it's very useful (Indian expatriate to the US).

The experience of expatriates with mentors from another culture was influenced by their career and organizational objectives. The interpretation and acceptance of mentoring was constrained by cultural distance between the US and the host country culture.

Navigating Conflicting Expectations: The Need for a Champion

For one expatriate from the US in Japan, the concept of mentoring was rooted in his American business performance values. The expatriate's experience with his US mentor was someone who would "champion" the protégé for the best assignments, positioning him to build technical skills and reach financial goals for the firm. The mentor did not teach the expatriate how to build relationships or conduct business in an Asian, indirect, high context culture because the protégé expatriate's assigned role was to work with *western clients* in Asia. The mentor left the firm during the expatriate's assignment.

The expatriate described a "them vs. me" experience with his Japanese colleagues on a three-year assignment in Tokyo. He was experiencing a conflict between the Japanese and US business value systems. He sensed that his Japanese colleagues resented his success at his assigned task, which was to orchestrate multi-million dollar deals with western companies conducting business in Japan, reaping high financial rewards for his Japanese colleagues. He was baffled by the paradox of the Japanese enjoying the profits of the American business model while losing face from the expatriate's ability to turn a high profit for the firm (indicating the Japanese were incapable of achieving this end without the American's expertise). The expatriate's US view of doing deals did not match the slow-paced, relationship-oriented business

development philosophy held by Japanese. The US expatriate experienced opposing

mentoring goals between the US the Japanese business models. He did not see how he

could perform his work role for western clients, and achieve career goals, if he were

mentored in the Japanese style.

> The Japanese weren't into making money, like the Americans are. They value
>
> relationships beyond anyone else. And they value governing more people than
>
> making more money. So it's probably more important to govern more people, do
>
> more business as far as hours go, better to build things and than to make money
>
> on things, right? If we're the best at building things, that's more important than if
>
> you make more money. And in the US, we're quite the opposite, right? We're into
>
> making money and that's a measure… Well, for us, it's efficiency. For them it's
>
> quality, or perceived quality…
>
> We didn't have a formal mentor program, which we really probably
>
> should have. In fact, we *really should have this kind of a process where you feel*
>
> *like someone's championing you,* but the reality was none of the other Americans,
>
> and even myself, you really didn't want to advocate for one of the other
>
> partners…because that would associate you with Japan
>
> (US expatriate to Japan).

The mentoring this expatriate sought was consistent with his performance goals in the US

but counter to the tacit and subtle social pressure he received from Japanese colleagues to

conform to their notion of building relationships without overt intent to execute business

deals.

In light of the culturally different understanding of mentors among the expatriates in this study, the *qualifications for mentoring an expatriate* include experience of an international assignment. Each expatriate in this study indicated there were substantial differences in their understanding of their role on a long-term assignment compared to their role and cultural awareness during a short-term project or business trip to the host country operation.

Adapting to Cultural Immersion and New Role Expectations

During the analysis of expatriate narratives, the qualifications of expatriate mentors surfaced and they were substantially different than criteria for career mentors in the home office. Several US expatriates in this study reflected on the substantial contrast between the depth of their expatriate experience requiring constant cultural adaptation and coping with ambiguity compared to the limited cultural awareness needed on short assignments or business trips to work on projects with colleagues in another country. This highlighted the limitations of home office managers and leadership in providing meaningful advice to navigate the cultural complexities and subtleties of an international assignment.

> So the adjustment thing was much larger the second time around…but in reality, doing a year is minimum for an expat assignment. In that one year, you're getting used to everything. And you're finally getting the hang of it. A 2-year assignment is probably a legitimate time period…That's how I felt the whole time [like I had one foot out the door]. So… I didn't bring a lot with me. But I always felt like I

was [living out of a suitcase]… Even though I was living in a house that was just

wonderful   (US expatriate in France).

This expatriate had lived overseas on a prior assignment and learned more than one

language. Despite her international experience and aptitude with foreign languages, she

felt it takes a year to develop an understanding of the culture and the business. Other

expatriates had different opinions and experiences of the length of time that would be

"legitimate" for getting a feel for the host country operation.

All expatriates agreed, international assignments entailed a personal investment

and depth of understanding completely different than the superficial awareness required

to conduct international business on short trips or virtually from the home office.

Staying as a Guest vs. "Getting on the Bus" in another Culture

Several expatriates likened the short-term assignments and site visits they

experienced to being treated as "guests" rather than part of the host country organization.

Two expatriates had the experience of being sent on short-term assignments for a few

weeks or months that extended into a full-blown expatriate assignment of over a year.

One explained the difference between his business trip, which meant staying in a hotel

"being served," and *living* in India, which required taking care of himself and getting on

the bus "with the goats and chickens." The contrast required a noticeable adjustment that

informed their ability to mentor colleagues on expatriate assignments.

I had been there three times previously on company business. I went for a month

the first time, two weeks here, two weeks there, but this was for five months. *Five*

long, intense months…I could talk about these trips forever. I still do…So the first

time I went as a guest, more or less. I would stay in a hotel and be all served and

everything else. And when I went as an expat, I lived in an apartment, had to care

for myself, on the street with the rickshaws, go grocery shopping, you know, get

on the bus with everybody else and the goats and the chickens

(US expatriate to India).

This experience added to his depth of understanding of his work colleagues' and

subordinates' perception of work, family and life, which is very different from those held

in the US.

One US expatriate contrasted his experience with employees in China on his short

business trips to his perceptions as an expatriate. The employees "put their best foot

forward" when he flew out for a visit, but that appearance was "not the same" as seeing

the reality of the day-to-day operation while he was on assignment. His immersion

experience enabled him to learn about the Chinese, Taiwanese, and Hong Kong Chinese

at work.   This statement reinforces the value of expatriate knowledge for advice and

strategy on international business projects by contrast to the limited insights gained by

managers who have taken short business trips overseas.

So even as I visited and invested time, being a visitor [from the corporate

headquarters] is so different. Kind of, fly in, fly out. They present everything

perfectly as you're there. And when you're there actually living through it, it's not

the same   (US expatriate to China).

The reality of the expatriate experience includes an understanding of not only the business operation and work group dynamics but also the personal logistical issues encountered while living in another country.

The benefit package of an expatriate is completely different than being on a site visit or business trip. Expatriates have the benefit of not living out of a suitcase, as they must do on a business trip, but the added responsibilities of immersion in the daily routine of life in another culture requiring the expatriate to understand the culture.

> [I was in the UK] a year and a half, 2006 and 2007, and it was unique too
> because when I went it was only supposed to be there for three months. So
> they put me up in a guesthouse. So it really wasn't like living on your own.
> When it got extended a year, a whole different benefit package kicks in… So
> …then you get a budget and you get a rental property…a car
>
> (US expatriate to UK).

Short-term assignments and international business trips only give a limited experience of the day-to-day challenges of expatriate life. Expatriates encounter the need to socialize into the work culture while learning another country infrastructure in daily activities such as paying bills, getting a driver's license, obtaining a work Visa, and an apartment. Business trip experiences alleviate the responsibility to invest in learning the subtleties of conducting personal business in the country. Thus short trips reduce the exposure to the experience, knowledge and attitudes needed to effectively mentor expatriates on the challenges of their assignment.

The expatriates in this study experienced mentoring shaped by different cultural assumptions across cultures. Several expatriates faced challenges implementing US style mentoring programs, which clashed with some eastern and other western cultural norms. The nationality of the expatriate seemed to influence the opportunity and kind of mentoring that was sought and considered useful by participants in this study. The US expatriates to China, the UK and Latin America indicated that expatriates or natives aware of the expatriate's home country compared to the host culture were most qualified to give advice to international assignees on cultural awareness; business trips and short-term work assignments did not develop a person's awareness of cultural nuances of business and life overseas. Since the world market is not dominated by the US as it once was, this understanding of different roles of mentors and perceptions of their acceptability across cultures is meaningful in the context of the research on international assignees and transnational organization development.

In summary, the concept of mentoring is not universal across expatriates from different cultural backgrounds nor were the relationships equally understood or accepted as "mentoring," across cultures represented in this study. Participation in pre-departure formal culture training or a mentoring program was not the norm, leaving expatriate workers to fend for themselves in navigating logistical, work, and value differences between cultures. Expatriates described the need to develop a "coping strategy," which meant: finding people to teach them a new set of rules for behavior to accomplish their work assignment or "figure it out" on their own.

Thus, the second theme that emerged in the analysis of the expatriate

narratives was the experience of enlisting mentors and other resources to cope with

the uncertainty of the international assignment. There was limited variation across

the interview data describing the expatriate experience seeking advisors and

informants for their new role. The expatriates took initiative in making connections

with people who could provide advice on the host country business environment and

cultural norms that would change their daily routine from their home country

experience. New international assignees had many questions they wanted answered

from the time they were offered an international assignment. Finding the resources

that could fill the void of knowledge on work socialization, logistical information,

and cultural awareness needed to complete their assignment fell into several

categories of experience: finding expatriates, interactions with human resources and

relocation consultants, relying on family, and building relationships with host

country colleagues and neighbors to adjust to life and work in the host country.

Theme Two: Coping with Chaos

There are so many chaotic things going on that you don't even know what to do!

We are used to situations where we have a lot of control and…We have a lot to do

with that. You just have to allow it. That's tough for westerners to do. 'That

shouldn't be happening.' A huge lesson in letting go. (laugh) It was a fantastic

experience

(Expatriate from the US to India).

Once the expatriates in the study were offered an international assignment, each of them immediately sought out veteran expatriates prior to departure who knew the multitude of changes and logistics that must take place to orchestrate the transition to work overseas. Depending on the purpose of the assignment, some expatriates were sent to work with a team, some were sent alone. Those who joined a team easily found expatriates with prior experience in the country of assignment, offering a pool of resources to learn about the impending assignment, provide direction upon arrival, and continue to offer support throughout the assignment. New expatriates sent to locations without home country colleagues initially sought information and support from the global human resource department professionals (HR), relocation consultants and trainers or expatriates outside their company. Expatriates who went on their assignment with family members reflected on their experience of family member support during the assignment. Several expatriates eventually experienced mentoring relationships with host country colleagues, which developed over time on assignment. There was a lot of "figuring it out on your own," to sort out cultural differences and learn new systems in another country.

The participant narratives revealed that expatriates sought a series of social resources to provide information as needed. This experience built their network of support. Based on the earlier analysis of the cultural nature of mentors, some expatriates might call these resources "informal mentors" and some might simply call them "people who helped me" figure it out. The composition of the informants and advisors in this network varied across assignments. Typically, it started with a site visit to the assigned country, asking experienced expatriates for advice along the

way, and working with HR or a relocation company helping the expatriate with initial logistics, such as finding a place to live and transportation to work.

The veteran expatriates clarified cultural norms and system differences for newcomers that the host country contacts could not see from the expatriate's standpoint. Expatriates needed assistance translating the meaning of host country behaviors through a different cultural lens than the one they normally used at home. After a few months, some expatriates and their families developed friendships in the neighborhood and relied on them to explain and interpret cultural norms, policies, and legal differences. It was an ongoing learning experience. Fellow expatriates understood the immediate challenges, especially in the first few months of the assignment. The coping strategies are described below.

Reassurance from Experienced Expatriates

For one expatriate from the US to the UK, it was a natural progression of asking for help on random topics, finding expatriates who were from his background as the best source for navigating the system in London to begin with, and moving on to the next mentor as needs arose.

> It was mostly Americans [who could offer advice] because Americans understood where you were coming from and what your confusion was. You know, they know that, you know, in the U.S., when you're looking for an apartment…there are three or four things you have to keep in mind, whereas the UK is different. It's understanding what's different and what the key differences are. And so they can say, 'one thing you need to keep in mind is x, y, and z.' Which a Brit wouldn't tell

you about, because they wouldn't… necessarily know that that was something
you wouldn't be aware of [because it was the norm for the locals].

   So Americans were the *best sources to start with*. And once we had been
there for five or six months we had a group of friends who were non-US: South
Africans, Australians, Brits, and so on…we were sort of the token Americans in
the group there…They were friends from church, and… neighborhood groups that
my wife got involved in. So we sort of built up a core of people who had no
relation to my work, which ultimately ended up being the ones we spent the most
amount of time with. They were able to explain stuff that the Americans couldn't,
for example, how the school system worked there…There's this whole system
and you have to do this and that, and you could ask them that. Whereas the
Americans, you know, they didn't really think about that…So there were things
that each group added to helping us understand how things work

(US expatriate to the UK).

Prior to departure to their host country, new expatriates relied heavily on expatriate peers
and managers who had been to the host country to answer questions and reduce
apprehension about everything from housing and appropriate attire to the medical and
education systems in the host country.

   One expatriate from the US to China was not joining a team of expatriates, so he
contacted people who had returned or Americans in similar roles from other companies.

   I had a few people who were ex-expats...Some were in China, some were here
back here who I…reached out to before leaving…Most of them were American

who went overseas and came back. Some were…with [multinationals] or

companies like that. There was a guy who was actually one of the leadership OD

trainers at [a private multinational], actually, he's Australian. I used him a lot as a

mentor. And so I had a few people I informally reached out to...

(US expatriate to China).

On the outset, most expatriates took initiative in making email inquiries to expatriates

currently stationed in the assignment location. Former expatriates who had returned to the

home office were also a resource for information on the work environment, cultural

norms, transportation, and other logistics involved in the move overseas. Over half of the

expatriates in this study had teams from their home office working overseas who were

instrumental in the experience of making a smooth transition to their new job.

The following expatriate from India was on a plane to US in less than a week after

he was given his assignment.

The benefit with [my company in India] is that there are a lot of other team

members who were already in Minneapolis…So they had prepared a booklet or a

training manual…'If you get stuck, this is what you do'… Like a Thomas Cook.

You have the advantage of people who had left before you. There is a team…You

can do a reasonable amount of groundwork that way

(Expatriate from India to the US).

Eight of the expatriates in the study were informed of their assignment within two months

of their departure. Expatriates recounted that short lead-times left limited time and

opportunity for reading about or attending training on their assigned country. The

participants in the study were eager to learn relevant, practical and culture-specific
information about the host country.

One US expatriate was advised by his company human resource professionals to
seek advice from experienced expatriates to prepare him for the road ahead. He felt the
conversations prepared him "psychologically" since he had not been to India previously.
He was surprised there were no company structures in place for finding other expatriates,
so he took the initiative to find them and ask questions to reduce his apprehension about
his impending assignment to India. The experience was a whirlwind of logistical
planning, moving, and collecting information to manage his expectations of the
experience of his life and work in India.

> I was confirmed a month out…boom, boom, boom…put my stuff in storage... I
> took a week off in between [leaving his home office in the US and starting a new
> role in India]…to pack… I moved to India sight unseen. Which most people said I
> was crazy to do…There were meetings with all the business partners I had to
> connect with [in India via video conference from the US]…Security
> briefings…health work up...All the logistical things…
>
> In terms of orientation about India, I was sent the PowerPoint India
> executive presentations…No formal training package or orientation package for
> expats…Not at all. Nothing. It was, 'Figure it out on your own.' It was, 'Talk to
> other expats…Talk to people.' That was the way to learn. Yes, [other expats]
> would give you the truth. (laugh) They get right to the point…[I emailed] a couple
> of times a week with some of them. It wasn't constant…I had questions…I

wanted answered. 'Am I going to get sick all the time?' 'Yep, you're gonna get

sick a lot. And you're gonna end up in the emergency room'…and I did,

twice…And it's the water…What you learn is what to avoid

(US expatriate to India).

Expatriates found that in depth consultation on their new role or the cultural differences

on their assignment were not always available. It was a common experience to receive a

one-page document on the country of assignment in preparation for their international

work.

One expatriate from India assigned to work in the US received practical and

career development advice from his email exchanges with team members already on

assignment in the US. He exchanged a half-dozen emails to learn the basics of US work

life: work hours, proper attire and how to make a phone call. One friend advised him not

to be "stubborn and arrogant," meaning accessible and positive with host country

colleagues on his assignment. Since he had not been to the US, he was looking for

advice on all aspects of the expatriate experience.

I was the first person from my family who went to the US or outside of India…I

interviewed people [for advice on being an expat]…we should not be very

stubborn and not arrogant. To get the most for the client…knowledge is the most

important thing…attitude and other aspects of human nature. People may be

good at technical, but I get a call on weekends and I may not respond…it will

hamper the company. We want to be sure [to have a positive attitude so] we give

the best to the client.

I had a friend working for [the client]. What should I wear? I sent an email to my

friend who was here…since I had somebody. There are situations where you

don't know anybody … sometimes you are alone by yourself…[One friend in that

situation] he went to Google. They have a pretty open culture [in the US] and he

wore a coat and tie and everyone said to wear jeans…Even my branch

manager…[My company in India has] a list of dos and don'ts, given to you

during your VISA interview…They give you a one-page document. 'You should

wear this don't wear [sandals to work].' Then you are ready (wry smile). [My

friend's] mother was [in the US]…she gave me a couple of things [tips on what I

need to know for the move to US]. My friend gave me how to make a phone

call…What are the working times [work hours]…A couple of important things to

bring with you because it's winter…maybe six or more emails…for dressing. In

India, [work required more formal dress]… now we come in jeans

(Indian expatriate to the US working for an Indian firm).

Although this expatriate had a positive experience on assignment, some transitions are

more difficult than others. The lack of preparation and relocation logistics support has its

costs to expatriate workers.

Core to Coping with Chaos: Cultivating Trust

Upon arrival on assignment, human resource (HR) and relocation professionals

extended a lifeline for the expatriate to navigate a new system. With the exception of two

expatriates who had a line manager in the home office, HR professionals were the

expatriates' only contact with the home office during the transition to the new job and life

in the host country. Each expatriate in the study reflected on the logistical support

provided by HR, and relocation company contractors working closely with HR, to

provide the "package" of agreed upon services during the transition to the new location.

These services were critical to communication, transportation, housing, and other basic

needs enabling the expatriate to focus on performing their job, especially when the

expatriate was not fluent in the host country language.

An expatriate from France to the US noted that the HR support during

relocation created "an environment of trust" between his family and his company.

The role of HR was particularly helpful in navigating a new system when the

expatriate was not fluent in the host country language and moved with his family. In

the case of the French expatriate coming to the US, he received support from local

HR and was assigned a mentor in his department.

> It's a lot of work to move a family [the company HR department] really tried to
>
> help you in the all the work you have to do. At least you know what you have to
>
> do…it's not the package…it's not the money but everything they finance…[is]
>
> pretty well designed here…We just have to execute…It creates an environment of
>
> trust… Which was not really the case in the last company I was with… You had
>
> to ask. Was not clear we had to ask what was organized, 'How do I do that?'… it
>
> was more difficult. [The company] really helped to make it go smoothly…a visit
>
> for the family…to find schools and a place to live…The second thing is [my
>
> department], because we are a diverse group we are 70 with 25 different
>
> nationalities. The on-boarding process is pretty well designed to quickly adjust in

the work environment…[We are assigned] a mentor for work and personal

matters… The person that will help you adjust…[we were provided] the addresses

for good shopping… we received books. We did research ourselves, we contacted

people who had similar experience, we had the basics [when we arrived in the

US]…one person to help us with administrative work…getting social security

cards, passing the driving test… information about [the city]

(French expatriate to US).

Although the expatriate from France had a positive experience in the transition, the

experience varied for expatriates within his company. A couple of colleagues were not

well organized and added to the stress of the overseas move.

Could I have been Better Prepared for the Transition?

A US expatriate who was assigned to Latin America encountered a visa

delay, which meant he did not receive a paycheck for several months after his move

to the host country. After living on credit for several months, the advocated that HR

professionals gain expatriate experience so they would understand the importance of

their role in relocation logistics and the stressful ramifications of lapses in HR

support.

I submitted all the paperwork to HR there for my visa, and I think we got visas the

last week of March [after his family had arrived the prior November]. It was

almost four months later, which meant [the company] couldn't pay me down

there, and we lived in a hotel. It was very stressful. I think, each country is

different, but one of the things that could be prepared better is kind of help with

that whole visa process a little bit more. You know, there are some things that

they just can't do. 'Hey, you're on your own.'   That's okay…Now, they did help

in a lot of things as well. I mean, a driver's license showed up in the mail one

day, which was nice. I wasn't expecting that. There are some things that helped.

The [host country] people really, really help.

I think one thing that is important though is I think some people that

manage policies, HR policies, especially from an international standpoint, should

have some sort of expat experience. I really think it is important because I have

worked with different HR people, and some of them are really understanding, and

some of them maybe aren't. Sometimes you just think, 'well, gosh, if you were

going through this, what would you think?' I think that's important. Maybe not a

whole expat assignment, but some sort of experience [overseas]

(US expatriate to Latin America).

The expatriates often relied on HR to in the host country to tell them basic policies and

provide access to necessary services. When these services were not provided, the

expatriate lost confidence in the company representatives to meet the expatriate needs as

set forth in the "package" of expatriate services. The extra frustration and time invested

in rectifying the situation was a deterrent to getting the expatriate's work done.

An expatriate in France found she had to take on the logistics of getting a car

herself when HR did not follow through. The expatriate shows her frustration but

also ability to get things done in another country with limited company support.

[The folks in HR] were supposed to set me up with a car, but they wouldn't tell me what my responsibility would be and what was theirs [for the expense]. They were trying to make a decision on how much information they wanted to give out, but also, according to them, it took at least 2 months to get a car. I'm saying, 'okay, I need to work here,' because it was three different [company] locations where I would have had to drive around…And the question…on a personal note, though, was the transmission [the cars in France are mostly manual] and I said, 'well, wait a second, I thought this was just supposed to be automatic. I'm not getting anywhere without that car.' So I said I'd rather go online and find a car, but they said, 'you would never find an automatic'. But of course if someone tells me never, I look into it. But I went online and I saw a whole web site dedicated to automatic transmissions. And it took me awhile… they weren't willing to help me, so I had to help myself…They were so hard to get a hold of…it was a big mess. It would just take too long [to wait for the company support]

(US expatriate to France).

Human resources provided support in adjustments other than just learning how to live in another country. More than one expatriate needed guidance on differences in the legal systems between his home and host country operations.

One expatriate from the US who went to India found the host country HR professionals to be important mentors in learning the laws that affected management policies. The guidance provided by HR enabled him to effectively perform his job and interact with host country employees.

In India, women can't work second shift. They can, but you'd have to give them

a ride to their doorstep. You have to apply to the government for permission for

women to work second shift because of safety reasons, you know. The mother

should be home with the kids and cooking dinner and not at work, that's part of it.

Women in India have different tax rates from men. Certain laws [are different]

(US expatriate to India).

Expatriates relied on the home and host country human resource professionals to

provide services and information that supported the expatriate, so they could hit the

ground running on their assignment. The execution of these services made a

difference in establishing trust between the company and the international assignee

and the quality of the expatriate experience. One of the services provided by HR and

their relocation consultant counterparts was formal culture training to prepare

expatriates for adjustment to their international work assignments.

Balancing Training and Social Support

There were three expatriates who received formal training either just prior to

assignment or upon arrival in the host country as part of their "package" of HR services.

Expatriate experiences with training varied within and across companies in this study.

For most expatriates, if the training was available there simply was not time to take

advantage of it before the company expected them in the overseas office for their

assignment. With the exception of one expatriate from the UK to US, the training was not

mandatory. Several companies offered their international assignees online resources to

develop cultural awareness and knowledge of different cultural norms, but this online

training was not required for participants in this study. Only one expatriate glanced at the online resources to learn basic information about differing cultural norms for business between his home and host countries.

Each of the three expatriates who received formal training arrived in the host country as the sole expatriate for the assignment, not part of a team. So they did not have the benefit of receiving advice from veteran expatriates. Their training was not delivered in the US. (They were employed by three different US companies.) One training recipient from the US found the culture training with a Japanese national was a "waste of time" and experienced difficulty in interactions with the host country co-workers in Japan.

For two of the expatriates who received training, it established a valuable foundation for understanding the cultural differences between their home country and the country of their assignment. These expatriates felt the training was helpful and referred back to content they learned in training to cope with specific cultural differences that came up on assignment. They leveraged the knowledge and awareness of cultural differences between themselves and their host country colleagues to build work relationships and develop a deeper understanding of the culture, which enabled them to play a pivotal role in major organizational change. It is noteworthy that there were expatriates who did not receive training who experienced similar achievements in the absence of formal training.

An expatriate from the US to India reflected on his training and the how relevant it was to his experience on assignment:

It was actually part of the package, it was an elective, it wasn't a requirement, but I took everything they offered. So it was like a three day cultural [training]…It was put on by partners in the UK…So you had to fill out a questionnaire before you went, you know, defining all your specifics [of your job and prospective role]...before I left here to go there so they knew what kind of a program to tailor, what business environment I would be working in, my level of experience working in that country. Personal situations, anything... They actually have a special book with your name on top of it, but it is tailored to answer the questions that [are relevant to your work]…And they bring in guest speakers, local business…it's a one-on-one session, both in India and in the UK, they were private sessions…

[The training] compared American values and UK values, you know? How we perceive [people from the other culture]…when I think of someone from the UK, what's the first thing that pops into my mind? Then they'd ask someone from the UK what's the first thing when you think of Americans? Americans are sort of stubborn and snobby, and I thought people from England were proper, you know? So it was interesting to see how you compare values.

Yes, well, they brought in community business people. One woman came in and talked about the hiring process in the UK, because I was doing a lot of hiring. You know, what to expect in an interview, what would be different, and what you would expect here in the US. So they tried to give you as much as they can, and you can't teach you everything in three days. But if you're going to be

> holding meetings in the UK, meetings have a structure like this in the UK,
> whereas in the US they go like this. In the US you start, you have an agenda, you
> discuss. In the UK you always start out with a little humor, a little chitchat, in the
> meeting you never reach a decision. You go out and discuss it, and then come
> back later and make the decision. So just be aware of the differences. When I
> went to India, never expect people there to be on time. You always start late. That
> was one thing that I did change when I was there, you know, it costs us money.
>
> (US expatriate to the UK and India).

The expatriate in India found he could apply his culture training to anticipate conflict
with the company culture. He then made operational changes that accommodated both
the local culture and the company values.

One expatriate from the UK applied his formal culture training during his
expatriate experience by using the training content as a conversation starter with his
American colleagues and managers. He asked for their assessment and opinions on the
extent to which the books and training reflected their views and American society values
in general. The expatriate valued the information from training about culture shock for
experienced expatriates. He learned he was "most at risk" to suffer from the shock of
adjustment since this assignment was his "second tour," which was not his intuitive
assumption.

> In pre-discussions, the most important thing was when I did the cultural training
> in Amsterdam: going through the culture shock curve…'it's gonna happen and
> expect it. If it doesn't happen be scared, because it will ambush you even more

when it does happen.' And the people who are most at risk at culture shock are

expats on the second tour…They've done it before, they think they know their

way 'round, then it surprises them when it happens.

So, that book about "Americans aren't crazy," was a really helpful thing

but the interesting thing having that particular resource, [and] some of the stuff

that they supplied about how Americans are different in the cultural training in the

Netherlands was grist for the mill for conversation when you arrive [in the US].

When there are people you don't know, you say, 'It's interesting before I came

here I went through this cultural training…' And people here say, 'Oh, really?'

Then you can tell them what you learned and they can tell you how much of this

is this true or not true

(UK expatriate to the US).

This expatriate enjoyed the response of the Americans who were defensive about

elements of the culture training literature, which stereotyped people in the US society.

This interaction helped him understand nuances of the culture and individual differences

between belief systems among his US colleagues.

Consequences of Being Unprepared

One US expatriate, who felt he received inadequate training from a consultant

during his first week in Japan, reflected on the shortcomings of poor training, which he

felt had a direct impact on his relationships and experience on assignment. This expatriate

had prior expatriate experience in Europe, proficiency in another language, and was

known for his work across cultures in business. He worked in an English-speaking office

in Tokyo, which, upon reflection, led him to make false assumptions about the western values underlying office culture, which was purely Japanese. This expatriate had already sensed tension with his Japanese colleagues on a business trip prior to his international assignment to Tokyo. The trainer, who met with the expatriate after his initial interaction challenges, did not offer to work through potential cultural issues using culture-specific scenarios as did trainers for the other expatriates.

> I had one day with a Japanese [trainer] in Japan, and looking back, it was the biggest waste of my time. I was shocked at how bad it was. Having [done a few months in Japan and a prior overseas assignment in Europe] I was looking for somebody that could take me through with more level of detail. Put it this way, if it had been a 100 level course, I could've done the 100 level course on my own. I needed a 400 level course. I had been with [my Japanese co-workers], lived overseas before, and they would say, 'hey you've experienced these things, but this is what you'll need to work through here.' And what I got was, 'welcome to Japan. Here are the cultural issues you're going to deal with.' Kind of 'dot dot dot,'[not explaining how to deal with them] you know? And the other thing to having a Japanese person teach me, even if they would say, 'oh this is how we do things in Japanese,' or 'you may find this really strange, but this is how we think.' *They weren't able to get into your shoes to tell the way that you were going to experience it*   (Expatriate from US to Japan).

His experience showed that inadequate training has consequences that may persist throughout an assignment. It took him a year to realize the negative perceptions the Japanese had of certain behaviors that were natural to his US business style.

One US expatriate in London explained that he found answers to the questions on culture without formal training. He felt that his support network compensated for anything the firm had not offered in terms of training.

I don't remember any formalized training. When we moved over to the UK. There were these big, huge stacks of books, manuals, sort of professional books that had been compiled sort of over the years with things [for expatriates] to know. 'Here's how you get over the shock; get an apartment; here's how you pay your bills; which is common here, it's common there.'…

We felt like we had a good support network, personal support network, to compensate for anything the firm may or may not have done. In my opinion that's more helpful because you could be trained for 6 hours, and give me a bunch of handouts, but in 6 months when I'm faced with a problem, you can go ask someone exactly what it is you do. Rather than trying to sift through a bunch of papers and hope that a) it's in there and b) that the process hadn't changed since they handed you the paper.

(US expatriate to the UK).

This expatriate's experience demonstrated that formal training is not always necessary. Social networks can satisfy the needs of some expatriates, particularly

when the expatriate did not find the cultural distance in values to be great between the US and UK.

Three expatriates described the gap between training, HR support and relocation services that affected their experience and work performance on their international assignment. Expatriates suggested alternative ideas for future expatriates to learn about the culture of their host country. The suggestions included "ongoing training" by someone who could "get into your shoes" in the country of assignment. One participant did not think that expatriate training could be offered by someone from the home office who had not had an expatriate experience. The need for culture training was recognized and justified by the risk of offending a host country colleague by behaving in an unacceptable manner.

Finding the right combination of mentors and training in the first few weeks of an international assignment, to avoid saying and doing things to offend the locals in their destination country, was a high priority among expatriates in this study. Expatriates shared the experience of not *knowing what they don't know* in terms of cultural differences, and that could damage business relationships beyond repair. One expatriate explained it like this:

> At work, we kind of all had different hats on, and yeah, there are definitely cultural things that are different. But I think you really start learning some of that when you go out socially…I think in the policy they have cultural awareness training...I don't know what that would be. I didn't do it. Yeah, I mean, I didn't know what to expect… Somebody in Minneapolis really couldn't do it for

somebody going to Venezuela. Maybe the host country, if somebody from the

host country kind of sits down and says, 'Hey, this is kind of how people react to

different things.' But it's kind of an ongoing training. I think there needs to be

some awareness of differences, because in other cultures there are things that are

very offensive. I think it should be part of that preparation

(US expatriate to Latin America).

The mentoring of expatriates by host country mentors was different in different cultures

and organizations. The experience of these relationships will be analyzed in the next

section.

Although training offered a foundation for two participants in this study,

most of the expatriates had to seek alternative resources to answer their questions

and interpret norms in work and society throughout their assignment.

Putting the Puzzle Together: Sources of Ongoing Support

The support received upon arrival from HR and relocation consultants in

combination with experienced expatriates already on assignment in the host country, was

particularly valuable to expatriates the first few weeks of the international assignment.

Beyond that, some expatriates received ongoing support from their seasoned expatriate

contacts. Some relied on family and developing relationships with host country contacts.

The participants described the high degree of stress and embarrassment as they

encountered the "unknown" systems and cultural norms in a different country. This

tension was caused by daily events such as taking mass transit, going to lunch, and

misunderstanding terminology and behavior in the office. Fellow expatriates, who had

experienced frustration and anxiety from similar encounters, offered guidance on interpreting unfamiliar events and processes in the host country. These relationships reduced stress, often injecting humor into the learning experience. Veteran expatriates provided valuable support in many aspects of the lives of the expatriates in this study.

> I would say the biggest [information resources] were when I went to the UK was the local HR there… plus there was a few other expats. So I probably would ask the expat first …before I went to HR. There were some things I needed professionally. Otherwise I would go right to policy... Some things fall through the cracks... [like] my paycheck
>
> (US expatriate to the UK).

Several expatriates shared in the metaphor that "we analyze the event through our own lenses," which made experienced expatriates well-qualified to interpret the events explain them to newcomers.

Most expatriates shared their reflection that their host country colleagues simply did not view work situations or logistical processes from an outsider's perspective. Host country colleagues could not interpret the meaning of their language and cultural norms that were puzzling to an expatriate. Thus the potential helpfulness of host country mentors was limited in some respects. The expatriate from France mentioned that HR did not provide him the list of company expatriates from France in the US, which would have been easy for HR to do and would have aided his family in some of their cultural adjustment in the first few weeks of the

assignment. The French expatriate shared that his expatriate experience in Africa was an easier adjustment, culturally, than living in the US.

> …It was frustrating to look for the French expats, it would have been easy for [HR] to connect [us with] them…It wasn't bad…[just] part of the experience. Yes, because we analyze the event through our own lenses…I don't have the same as people here [in the US] because I was raised elsewhere— not saying it's better or worse…You think you understand [but] you don't understand…it's not a question of right or wrong. And talking about the challenges, this adjustment was longer than I expected [to the US]…I was surprised. It was easier to adjust in Africa than here…It sounds crazy but the way everything is organized of their day to day life [in Africa] was pretty much the same…it was a French-speaking environment…
>
> (France expatriate to the US).

The adjustment period, which was presented in one company's formal training as "the culture shock curve," prepared expatriates to anticipate the their anxiety over the first few months of the assignment. There was a conscious effort to not appear critical of the host country but the expatriate experience was filled with daily questions about the differences.

Veteran expatriates were able to pass on information to newcomers that made for a smooth transition at work and in "each area of life." Logistical processes, such as the steps necessary to get a driver's license or car registration for foreign citizens, often involved extra paperwork for expatriates than for the locals. Access to transportation was

a focal point of frustration at the outset of several assignments, when the logistical

process was unclear.

> So I guess what I'm trying to say is each area of life, you know, your cars, your
> children, medicine, you had to, there was a bit of a learning curve in terms of how
> to go about doing this, and the first thing you develop is a coping strategy for
> that…I had to get a driver's license, you had to find someone to ask, 'hey I need a
> driver's license,' how to network [to find what you need to know]. And if you ask
> a Brit, they'll say you have to do this, this, and this, and then you're done. If you
> ask an American, they'll say, 'Well that's what you have to do to get a British
> license…. If you have an American license, there's some other things…' Now,
> that would be something that a native Londoner of wouldn't really think of,
> because they don't have to wonder what an American might be like. So that's, I
> guess, an illustration of the different things they bring to the table
>
> > (US expatriate to the UK).

HR does not complete all the logistical activities required to live in another country.

So relying on co-workers to tackle the process makes the experience easier.

You Don't Know What You Don't Know

An expatriate from the US who was on an assignment in Switzerland relied on

several expatriates to "warn" him before he dressed or behaved in unacceptable ways in

the European office, including keeping receipts from business trips and being punctual

for meetings. Expatriates assisted with practical suggestions on shopping, too. This

guidance was particularly helpful at the outset of the assignment.

There are HR policies…like finance, reimbursement type policies—like at [the

US offices], you went on a business trip, if you lost a receipt it was okay. It

makes sense you ate a meal at this time. At [the Swiss office], if you lost a receipt

for a meal or hotel, it was your expense…If you lost the receipt that's your fault;

you don't get reimbursed. We travel a lot so you have a lot of receipts. I travel

almost half the time…If you buy a candy bar at [the US office], I don't need to

keep the receipt…We have to keep every single receipt, everything was accounted

for down to the penny. If you are late for meetings…you are late less [in the

Swiss office because]…if you are late, people will let you know you were late.

     The people I worked with closely …they were from [my US

office]…There was one person who started the month before I did. Some had

been there three or four years. My manager and director for just over a year

[before me]…They would always be giving me tips here and there [on

behavior]…It was mostly at the beginning [of the assignment]… 'This is what

you need to look out for in the first few weeks'…You have these services here vs.

in the States…make sure you know, services aren't the same within X

hours…that's very common...There's no [big box store]…Here's where to get a

24 pack of toilet paper… It was very much a small world atmosphere…people

who had just gotten there, others had been there for a few years

                                      (US expatriate to Switzerland).

Expatriates offered the best advice to prevent newcomers from committing cultural *faux pas* at work. Four expatriates did not have the advantage of teams of veteran expatriates to advise them.

The US expatriate to Japan did not know other expatriates prior to arrival who could prepare him for Japanese cultural norms. Once he had been working in Japan for a while, he learned from other expatriates that, regardless of the expediency required by his western clients in closing deals, the Japanese way was to "go slow." His professional expertise and clientele would lead him to do the opposite, but he learned to adjust.

You know, we did talk to each other (expatriates). That was, I mean, your situations were always unique, you always feel that way. And so when you find somebody else to say, "yes, I've been there…" I did have support from the other expats. The idea of mentor would have been good, but the help of the other expats was really helping you learn how to work with the Japanese…I had a couple of instances I thought I was being treated unfairly [by Japanese colleagues]. In fact, other expats were being treated differently. When I went to the other expats to get help, they were reluctant to step in directly. That's because the Japanese way is to go very slow and *not decide*. I wanted a quick resolution; they were saying, 'Do what you need to do, just go slow.' After my first year, I understood how to deal with the Japanese. Where I had to put up with policies and perceptions that I disagreed with, I did. That was part of the learning process

(US expatriate to Japan).

Cultural differences in high context cultures were not obvious on the surface. So having

the guidance of someone from your culture lifted the fog to see the meaning of cultural

norms.

Asking for Help, Expecting the Unexpected

One expatriate from the US who went to India "learned to ask for help" after

observing the people, sights, and behaviors that exposed the huge cultural distance

between the US and India. Finding another expatriate who had experienced the "culture

shock" of arriving in India helped reduce stress. Fellow expatriates mentored this

expatriate to see the humor in the level of control Americans have over their lives;

control which he could not regain in India.

> If I needed to know something, [expats] found out by telling me what to expect or
>
> they helped me find it. When I got to my apartment, I had the same experience as
>
> everybody else, things weren't done; things were broken. And I had to work with
>
> my landlord to figure out how to do that. There were cultural barriers,
>
> language…There were lots of frustration. So I would turn to other expats and
>
> they would say, 'Okay here's this is how you do this. You call the landlord to call
>
> the plumber to call the guy… There is a chain of command that is different here if
>
> you want to get things done.' I also was able to turn to some of the support at [the
>
> company]…our logistics was set up. I learned to asked questions and ask for help.
>
> Our apartments, our cars. There's a lot of stuff you don't know. *If you assume*
>
> *something is going to happen you are going to be very rudely awoken* when you
>
> realize that things are not going to happen that way. You realize it's not going to

happen that way in India. You don't assume anything. Things happen *that you*

don't expect in India and they *happen a lot*

(US expatriate to India).

The expatriate experience meant not assuming anything and expecting the

unexpected.

Expatriates from India who participated on this study typically moved into an

apartment they shared with their co-workers on the assignment. They were not

assigned formal mentors and did not consider the assistance from their peers

mentoring. Yet the three expatriates from India derived the most support from their

expatriate team on their assignments.

Families Provide Reassurance and Support

Half of the participants in the study were married when they began their

international assignment and four married during the assignment, (two of them to

local women from the host country, but not co-workers on the assignment). Most

expatriates recounted the support and mentoring received from their family members

on assignment, with the exception of one expatriate who attributed his divorce to his

wife's inability to adjust to his assignment. (He did not abandon his assignment as a

result and later married a local who assisted him in his immersion into her culture).

Four of the expatriates reflected on their spouse's interest in other cultures,

experience living in a range of countries, and capacity to learn other languages. Five

of the expatriates brought children on assignment, who seemed to share their parents'

enthusiasm for living overseas and learning another language.

The US expatriate to China relied on his wife, who was fluent in Chinese, to navigate the tasks of daily life and interpret some of the cultural paradoxes he experienced at work.

My wife was actually helpful too because she, she's a Sinophile, and little did [the company] know that they were sending me with a wife that was really the expert. [My wife speaks Chinese; lived in Taiwan for three years as a teacher.] She loved it. Taiwan's different…from China. So for her it was sort of a culture shock for her too because she kind of expected to go back into her Taiwanese life and it didn't quite work, because the Chinese are different. But still, from a language, perspective it was easy and there were a lot of things that were familiar so she liked it. This time, too, she was with kids, so it was a little bit different. She was glad to come home because it's not easy raising a family there. *But she was clearly my mentor in that regard.* Like why do Chinese people do this, this and this? And she'd just be like well, you know…

(US expatriate to China).

In this case, the expatriate derived not only moral support but also cultural insight from his spouse during his assignment.

The US expatriate who took a role in a Swiss office described his wife as someone who enjoyed learning languages, having spent time in Central America. He expressed the importance of her companionship on assignment, in a region where there was not a lot of activity after work.

It would have been different if my wife were working or if my wife weren't there.

Culturally it's a country that closes at 5 o'clock and weekends. It would have

been more difficult…I don't know how some people do that

(US expatriate to Switzerland).

An expatriate assignment can be a lonely existence if the expatriate cannot find people

with whom to socialize.

The US expatriate in Japan witnessed a colleague from the US suffer from the

loneliness of being on assignment without a spouse or family while enduring the stress of

working weekends with minimal support from Japanese colleagues. This colleague was

not included socially nor did the Japanese associates offer assistance to meet work

deadlines imposed by the western clients he managed.

Like my colleague there, you know? *He had some dark days*. At least I had a

family to go home to, just normalcy. He was by himself and it'd be just like, you

know, in our business we're so client driven. Whether or not it was a Friday night

or a Saturday morning, the Japanese went home for the weekend. They wouldn't

return any calls. So if you're trying to serve these huge clients in the firm in

Japan, and you're kind of the US representative, and you can't even help you, and

they don't appreciate what you're trying to do, you look bad, and just want to kill

them. You got the various senior partners in the US well, saying will you get this

figured out by Monday morning. Sunday night you need it figured out. And you

just can't, and you're at the mercy of these other people…I'm just reminded of

these problems he had (US expatriate to Japan).

Expatriates were aware of the stress involved in being far from friends and family while working on high stakes assignments in one's career. It is emotionally draining.

Taking a family on assignment added extra variables into decisions about how long to remain overseas. Distance from extended family and educational plans for children often are a deciding factor in the timing of the assignment duration.

> My wife was a big traveler. She studied abroad quite a bit when she was in college...I lived in Germany for two years 10 years earlier, so I was used to life overseas. And my wife had spent various stints of several months all over the Middle East, you know, doing study abroad things. So we are both familiar with living overseas. But moving overseas, we have roots here, and that was a little more intense than going for six months and then coming back home. So we decided to do it, but then three years turn into five and we had two kids, one of them was 4 years old and approaching school age, which was one of the deciding factors in determining whether or not I decided to [extend the assignment], on a personal side we needed to decide what we needed to do (From a US expat to the UK).

Reasons for accepting an assignment change over time when family is taken into account.

For expatriates from countries such as India, where families generally have close bonds, the factor of being away from parents can influence the expatriate. For two expatriates from India, living far away from their parents was the biggest

challenge, even though their spouses joined them in the US. One expatriate summed

it up like this:

> I'm thinking…[big pause] Big challenge here…being away from family. If there
>
> is an emergency it is far away. I had all my challenges in South India so working
>
> in US has not been a challenge. I rather enjoy it…here you know what you're
>
> working on. It's been a good learning experience [work wise]. It's the family that
>
> is the biggest thing
>
> (Indian expatriate to the US).

In addition to support from family, expatriates, and HR professionals, expatriates

interacted with host country colleagues who taught them the subtleties of the culture and

unspoken rules of the workplace.

Theme Three: Mentor Roles Change Over Time

Expatriates learned the rules of the new work culture and societal value system

through experiences with colleagues at the host country operation. It took time to

establish these relationships. There were five expatriates who did not join a team of

expatriates on assignment but worked exclusively with the host country colleagues and

managers. In contrast to the eight expatriates who joined a team from the home office on

their international assignments the five solos expatriates spoke more about their

experience of "figuring it out on your own" while experiencing high levels of stress and

political challenges. For them, forging friendships with co-workers and neighbors

supported them in various aspects of their work and personal life. These interactions were

perceived as mentoring by some expatriates and not others. The knowledge gained and

ability to interact within and across cultural boundaries contributed to their personal

career development as well as organization development on assignment.

Being the Outsider

A US expatriate in France faced challenges with uncooperative French colleagues

with support from a French colleague who was a consultant to the company. This

colleague advised the US expatriate as she waded through company politics to complete

her assignment. While US expatriate spoke French at work, this relationship was

bilingual in English and French. The expatriate neither experienced support from the

home office leadership nor was she given authority to use her expertise to accomplish the

process improvement objectives of her assignment. She developed rapport with her

French colleague and his advice helped her understand the organization and accomplish

her work.

> There was some figuring out [on my own], but there was also, though, a
>
> French colleague who he had been a consultant at another company that we
>
> had acquired. …His English was fairly decent, and he and I shared an office.
>
> There were times when I could talk very freely with him, about either a
>
> mistake I made or my perception [of the company politics and culture
>
> differences]. Although whenever I talked with him about that, I could hear in
>
> his voice what was going on. It was really neat. I think we made a good
>
> bond…I would say, 'Is this the French culture?' And he would say, 'No, it's
>
> the company culture.' And he'd worked with other companies, and that's
>
> why they wanted him in there because he'd had experience and success in

other companies. And so he was trying to learn the culture at [the company].

We were fighting these battles together. A few times when I would voice my

disappointment in how things were going, I could tell he felt sympathy for

me and he would try to do things to help me. So he did help me at certain

points where I wouldn't have been able to do it without him

(US expatriate to France).

The US expatriate to France also found support from her French neighbors, who

were particularly helpful in finding useful information for experiences outside of the

workplace:

[My] house had an outdoor swimming pool. I never had an outdoor swimming

pool in my life before. So I'm having to learn everything in French and French

directions [for pool maintenance] and couldn't figure some of the stuff out. So I

had to get friends to help figure some of this stuff out...But their friends could

only speak French, so I had to speak with them in French…but people would

reach out to me. And when they learned I was American they would say, 'Oh, let

us introduce you to this couple and this couple.' So we ended up becoming fairly

decent friends with some of the local people and then we would agree to go

skiing, you know. I think I got more benefit out of making that leap

(US expatriate to France).

This expatriate's experience of learning the French was essential to building these

friendships in France and accomplishing her goals at work through work colleagues.

An expatriate in China experienced the benefits of building relationships with a few subordinates who would inform him, counter to hierarchical custom, that he did not have support for organization changes he had initiated in China. This expatriate was conscious of the need for middle management "buy in" for change to achieve the goals of his assignment. Building relationships with host country employees had enabled him to deal with the situation in a way to save face for all managers while moving his company's agenda forward.

> I just remember the moment that I have these 'ah ha' [now I understand what's going on]. I can't remember what the details were, but they were to do with relationship building. And sometimes just thinking that…I built pretty good relationships but yet I was an outsider because…It was just classic 'managing your stakeholders and influencing' [people]…skills and I would feel like I did enough of those consensus building or "making the rounds" before making a decision. But then I'd be surprised [in] the end by the level on which you need to do that [in China] compared to here [in the US]. Where I would think I would have touched base with everybody that I needed to, and then I would get this barrage of anti-decision, you know? And I thought, wait a minute I thought that I talked to all your teams already. But I didn't talk to this person, and you know, they would all know amongst themselves like where the problems were and you know? So I'd think to myself next time, you know, that I would go back again and reconfirm that they're on board, because they might have said, 'yeah, yeah, yeah' at the beginning, but…at least, I had relationships that were good enough that one

of them would come to me, like a secret mouse that would come to me and just

like, '[Sir], just so you know, there's a riot out there based on your decision.' I'm

like, 'Really? I thought we all in agreement.' And they were like, 'No, we are not

all in agreement yet'   (US expatriate to China).

In this interaction, the expatriate experienced a "reverse mentoring" relationship with

an employee in a culture that typically resists giving upward feedback to managers.

An expatriate from France to the US explained his struggle to understand

fundamental differences in the underlying cultural values of daily topics of conversation.

He was sensitive to asking questions that might seem judgmental of his host country

norms, values and belief systems. During the first few months of his assignment, even

though he was assigned a formal mentor with whom he eventually formed a close bond,

he relied on his English instructor to explain some of these differences in order to not

seem critical of US society:

> It's more when you talk about the weather, the travel, politics, religion everything
>
> is different… To try to understand…the democrats would be considered
>
> conservatives in Europe… So you need to understand how it's organized and
>
> what's different. *To re-understand and take the most advantage of the*
>
> *discussions...*they're talking about events or news, and you're not aware of the
>
> background and the history behind them, and you don't know the people as well.
>
> So it takes time to adjust and be comfortable. So we come from an environment
>
> where you know how it works and you know the major events and concerns in

your country; and you arrive here and it's different. So it takes time to adjust and

be able to really feel like home....I really enjoy it. It's a great opportunity.

I used [my English instructor as a] resource the first few months. Now I

ask my colleagues. And now they tell me the truth…at first…they tell me what I

want to hear. (laugh) In the beginning I didn't want to give the impression that I

was being critical…just trying to understand. I was not trying to be critical. Every

day I have a question

(French expatriate to the US).

The expatriate from France conveys the experience of being inundated with enormous

amounts unfamiliar information at work, on the news, and in the community. He was

anxious to ask questions about all of these areas of life while trying to not to seem

judgmental of the differences he observed as he interacted with the host country culture.

One expatriate experienced coaching from host country human resource

colleagues on employment law specific to his host countries. This expatriate had separate

assignments in the UK and India and needed to learn the cultural and legal differences for

hiring and managing manufacturing employees in each location. Some of laws dictated

his role in conducting performance appraisals and requesting that employees work

overtime. There were different restrictions according to union contracts in the UK and

employment regulations for work in India. This expatriate was on an assignment to

achieve implementation of consistent operations in plants constrained by different three

different cultural and legal systems:

[For the UK] professional levels shop floor, I could not give performance

appraisals; but here in the US…I could. In India, we never really got to that point

where we started assessing skills and skill sets to see where people could work or

couldn't work… In India, a person who works on the shop floor for the first two

years was considered a trainee, okay? And if they pass training then they become

an employee. So they actually have a whole different…system and

structure…They could not become an employee, but the benefits are very

different in India. The company provides transportation, bus rides all over the city

to bring you to and from work everyday at different times. It provides breakfast

when you get to work, lunch, and, if you work late, dinner. In India, because of

the buses, you have to coincide work with the buses; but you know, their hours

are pretty well set. It's a six day work week.

And like I said in the UK, they're basically driven by, you know they don't work

a 40 hour work week, it's more like a 30 to 35 work week to begin with, and they

pretty much worked by the clock. They would work you know, four, 9 hour days

and Friday would just be like a 4 hour day… Fridays they would always get off

early   (A US expatriate to India).

This US expatriate performed HR and operations management roles on his

international assignment. So the support he received from HR on the legal

requirements and distinctions between the UK, US, and India was instrumental in

hitting the ground running and getting his work done. This expatriate, among others,

learned that joining his co-workers for lunch helped him make strides in building

relationships with host country colleagues and subordinates.

The Importance of Lunch in Being Part of the Team

US expatriates in Switzerland, France, India and Venezuela learned from

their host country colleagues the importance of a sit-down lunch in building

relationships. They had to overcome the habit of squeezing in extra work time over

the lunch hour, which they learned is a phenomenon particular to the US. They

established bonds with host country co-workers by engaging in this ritual, improving

work relationships and their ability to accomplish the goals of their assignment.

In the experience of the expatriate to Switzerland, his host country colleagues

teased him while socializing him into the work group through their lunch and coffee

routine:

At [the US office], sometimes we have a lot of work and we eat lunch at your

desk. One of the first things when I got there was they said, 'Are you going to be

like the other Americans and eat at your desk or are you going to try to get to

know the people you work with?' If you go to lunch…they take time at their

lunches. It's not quick…you sit down. They use proper silverware. I don't think I

ever saw to-go cups…I saw Starbucks…Lattes were $8. I never saw Starbucks

cups…you don't even see coffee cups bigger than 8 ounces…One of my first

weeks I brought in a travel mug like 16 oz size…People laughed, laughed

saying… 'that much coffee? no one drinks that much coffee!' They just drink

little coffees…. No one drinks that much coffee. There is an espresso machine at

work. On the way home I took the bus. I noticed on the bus nobody had a coffee

mug. Oh yeah…Americans were made fun for that. A lot

(US expatriate to Switzerland).

The humor of this interaction was instructive on the cultural norms in Switzerland.

A US expatriate in South America experienced a change in his daily schedule

to accommodate the tradition that Venezuelan managers all went to lunch on payday.

The expatriate learned to participate in this custom to become a part of the group.

Time management, it's a real important thing for a supervisor in South America

or even an hourly worker with his or her lunch-time. I mean that was sacred time,

right? How many of us really have a set scheduled time that we take lunch [in the

US]? Or eat a sandwich as we continue to work or don't eat? But that was real

important [in the Latin American office]. And the salary group, especially on

payday, the 15th or the 30th, between 1:00 and 1:30. I was a manager of a facility

that had 300 employees. Because they'd go out to eat, that was a real important

thing to them. It took awhile to get used to, but then again I'm the kind of person,

I don't enjoy going out to eat while I'm working, unless we're going to

specifically accomplish something at lunch, you know?

(US expatriate to Latin America).

Expatriates learned that the meaning of rituals embedded in work life are important

to building relationships on assignment and understanding the values of the society.

The US expatriate in France learned from the host country nationals "the hard

way" that, not only could there are no meetings over lunch, between noon and two in

the afternoon, but also senior managers must approve meetings with French

colleagues, or they would not work with her. The latter experience showed the

significance of hierarchy and chain of command in this organization. These

experiences exposed the daily clash of culture the expatriate struggled to understand,

causing her frustration in accomplishing her work:

> When you did an online search for meeting possibilities, nobody had anything
>
> [available] between noon and 2 p.m. When you saw that, you said, 'Hmm,
>
> something is going on company-wide here.' No one dared to put a meeting on the
>
> calendar. I could meet with the managers, but they knew me and they knew I was
>
> working with [the director]. But in terms of setting things up with their reports, I
>
> had to set up meetings with the managers first and say, 'I want to set up a
>
> meeting.' And that, I learned the hard way. But then, I would have to preface the
>
> meeting arrangement saying, 'Your bosses are aware of this.' But they knew
>
> about my project
>
> <div align="right">(US expatriate in France).</div>

Making the accommodation to "take lunch" daily was not easy nor was dealing with

hierarchies when Americans are accustomed to less formal organization norms.

In India, an expatriate manager from the US violated a social norm that

managers do not eat with shop floor workers. Although these employees were

college-educated engineers, since the expatriate occupied a higher rank in the

organizational hierarchy, this was extremely unusual. The manager felt this

experience engendered more respect and commitment for him from these employees

through demonstrating inclusiveness--that he personally valued of each employee equally.

> Another thing I learned in India, all the managers, they go to eat lunch, and they eat in the same cafeteria, but they don't sit together [with their subordinates]. They're more or less segregated. I remember coming into eat lunch one time and it was sort of late, and there were people who work on the shop floor, so I said, 'Can I sit with you?' And 400 people's heads turned. I will never forget when I sat down and started asking what their names were. They were very nervous, [laugh] because I was a senior leader. A few days later there were some people who walked in and they said, 'well, sir, will you sit with us?' I got to know their names and stuff like that It's called the 'lucky table.' 'Will you sit at the lucky table?' It was sort of fun. At first it wasn't that way… I probably left knowing half the people's names
>
> (US expatriate to India).

This manager felt it was important to behave in a manor consistent with his values despite the Indian cultural values of separating employees by role and rank in the organization, as well as by social class and caste.

Janambhoomi, Karmabhoomi: Nurturing Personal and Professional Growth

One expatriate from India explained his experience with mentors for his career development during his international assignment, which was guided by senior leaders in the US. He used an Indian metaphor to describe his expatriate experience, which represented his progression from being nurtured by his family in India and

coming to the US to grow in his career. The words for these transitions in his

language are: *"India is my Janambhoomi, where you learn and grew up, and then I*

was transplanted here Karmabhoomi, where you prosper in your profession."

His mentors focused on understanding the nuanced communication

differences between a direct and indirect style, which he felt was necessary in his

consulting work. He initially experienced these differences from classmates in his

MBA program in the US and subsequently was coached by senior level host country

leaders in his organization. This reflection of an expatriate explicitly recognizing his

experience of career development aided by host country mentors was a rare example

from the study.

> I came from an indirect culture where saying "no" was almost non-acceptable.
>
> You go to a meeting you don't want to say, "I don't understand"…that was a shift
>
> that happened over time. I think I went from being indirect to very direct…to
>
> cause some offense. You are you looking at part of it is because I am in
>
> consulting…very direct…There are very, very senior people in my company who
>
> are teaching me those finer nuances…basic English, in your own language you
>
> have a basic command…With the CEO how do you say things vs. the finance
>
> manager…I'm still learning a lot…tact…diplomacy…You need strong trust
>
> between two people before you will say, 'listen...' [you are causing people to be
>
> offended]. They say, 'that's fine… they write it off…'
>
> (Indian expatriate to the US, working for an Indian company).

The expatriate needed to develop trust with in host country colleagues to experience the benefits of this kind of mentoring on his assignment. Understanding the meaning of expressions even when English is used as the common language has its challenges for expatriates.

Can You Say that Again?

A US expatriate in the UK experienced that speaking English can be misleading even when it is the first language of the expatriate and the host country co-workers. In the UK some terminology has multiple meanings and expressions have conflicting meanings compared to the usage in the US. Miscommunication over semantics can lead to disastrous results if the expatriate does not pick up on the nuances of communication through training, mentoring, or experience. Understanding cultural differences takes time and awareness of the subtleties of communication styles.

…one thing that I would say was different, it would be not necessarily be restricted to the meeting context, but rather, cultural sensitivity and knowing, being able to read between the lines. And that's something that, you know, you have to be able to do even with going down south or going out west. There are differences there in extreme parts of the country you tend to be sensitive to. For example, to the Brits, *they understate everything*. You have to be able to read their understatement to understand exactly what they're telling you. A key example, and this is one that they would actually use when they would talk about cultural differences and training sessions over there in London, was if an

American partner calls into an office and says, we're in a meeting and the client

says, 'there's a bit of a problem; there's this.' Well, if I'm here in Chicago, I

think, 'if it's a wrinkle, let's iron out the wrinkles.' If a Brit says that it means,

'We're all going to die! What are we going to do?!' A Brit says, 'We have a bit a

problem…' That means, 'Drop everything you're doing. We have an emergency

here!'

…That's not the only one. There are other subtle views that you pick up, and a lot

of them, I don't even know if I could describe them, because I didn't really

consciously focus on them. You sort of get a vibe for, you know, the things they

said, the order in which they would present them, you sort of pick these things up.

And …that takes some experience before we become attuned to those finer

aspects of it   (US expatriate to the UK).

This is another example of expatriates needing to be attuned to the cultural differences on

assignment and not taking for granted their interpretation of the meaning of language or

behavior at first blush.

The US expatriate in Switzerland explained that English was the common

language across many different nationalities of his co-workers were working

together in a US company's European office. English was simply a vehicle for

communication in the Swiss office, which was in a French-speaking region. Even

though the choice of English may have been driven by the fact that they were

working for a US company, there was a strong sense of the multicultural context in

daily interactions.

It was an English speaking office…The whole office was 120. The group I

interacted with on a regular basis… it would be about 10 -15 [people] and then

other teams…If I had research with the Italy teams, we'd do focus groups and

things like that. Also there was contact for objectives of the study—[countries I

worked with] Italy, France, Poland, UK, and interacted with Mexico…didn't

[travel] go there. Spain. Oh Germany, also.

It was much more an international community. You could get by if you

didn't speak any French. When we went to register in the Canton office they

spoke English. When I went to get my driver's license. It is very easy to get by

there with English

(US expatriate to Switzerland).

Proficiency in the host country language is beneficial on many levels for

expatriates, socially, professionally, and personally. The variety of experiences

conveyed in the narratives in this study did not point to proficiency, or lack thereof,

as the key to overcoming obstacles and achieving assignment objectives in the range

of assignments represented in this study.

Self-Development without Mentors: "Figuring it out on your Own"

The expatriates in this study demonstrated flexibility and initiative in finding the

answers relevant to their international work and personal life. They developed an

awareness of new cultural norms during the assignment, while demonstrating an

eagerness to learn, willingness to be flexible, respect for alternative policies and

processes, tenacity in difficult situations, and sense of humor in navigating the complex

political and cross-cultural issues on their assignment. For expatriates whose company

had sent no other expatriates to the host country, this meant reaching out for resources

outside of their company. One US expatriate contacted several veteran expatriates from

other companies before leaving town, but once he was on assignment, he "figured it out"

himself:

> I think…the most helpful [was the] Australian friend of mine, 'cause he had sort
>
> of been there, done that. And he was an Aussie so he kind of knew Asia and some
>
> of the dynamics. So he was very helpful. Others were helpful in their own way,
>
> but I figured it out mostly by myself   (US expatriate to China).

Most expatriates experienced a sense of pride in "figuring things out on their

own." Several expressed the new level of confidence they felt after taking the

assignment. It was a piece of the experience made it challenging and exciting—risk-

taking, adventurous, a mystery to be solved, a test of their perseverance.

> Just the experience of living alone, coming to a new country, being reasonably
>
> successful where you are, learning about the new culture...Gives you a level of
>
> confidence, I think. First time I came to US was my First international flight,
>
> second or third air travel … Now I feel like if you sent me to Switzerland
>
> tomorrow or Latin American, I have the confidence…
>
>   (Indian expatriate to the US).

Every expatriate in the study, even the ones who faced difficulties interacting with

the host country colleagues or achieving their business goals, said they would do it again;

most had wanted to extend their stay. The main frustration was caused by obstacles they

could not get over without company assistance, such as logistical problems that could have easily been averted by effective HR support. A few of these experiences were: not being able to buy a cell phone without a social security number (required in the US), not having transportation because you couldn't get a driver's license, car, or driver, or not getting a paycheck because your Visa paperwork wasn't processed in a timely fashion.

> Probably one of the most challenging things, and this was in all of those expat experiences, was the beginning documents, getting visas, getting all that stuff. It's kind of a corrupt country, and those things are hard to get anyway, and there were just some things, it was just like, 'well, you're on your own'
>
> (US expatriate to Latin America).

The US expatriate to France was learning French as she dealt with the logistics on assignment. "I had to answer telephone calls in French. I had to close all of my accounts in French... So nobody told me what to do, I just had to figure it out…" The expatriates viewed this experience of taking initiative and learning to make a decision without much direction or information was considered a "valuable life skill:"

> You know, there's a lot of value in that, even outside [of my business]. Learning how to project *confidence when I didn't know what I was doing* was a valuable life skill that I picked up and I use it very, very frequently because of this US - UK dynamic we were dealing with on the ground, in the office, you know, everyday
>
> (US expatriate to the UK).

These expatriates show a persistent willingness to learn and ability to think on their feet, while on a steep learning curve of starting a new job in a different culture, often communicating in a second language.

One of the expatriates from India explained that his experience as an expatriate made him more open to learning about other cultures: "People can be stubborn about anything. I wanted to come. If I complain too much, get away from the situation or I change the situation…That's my philosophy." The opportunities he was given to grow professionally in the US were a natural progression in his life and career.

The experience of coming to the US expanded his world and his understanding of the Indian culture, which has many regional cultures. He enjoyed a new sense of awareness of people of many nationalities, feeling he had joined an international community by leaving India to work in the US.

> You find every culture here, right? It's an influx of people. I have friends who are American, Irish, German, Korean…I have friends from all over. It's not just US… it's a conglomerate of people. I never learned about Indian culture so much as here. Because if you are from Minnesota and you call yourselves "Minnesotans" or people call themselves "Californian"…you all go to another country and you call yourselves "American." And in India I call myself "Punjabi" but when we all come here we all represent India. We are more open to interacting even amongst each other…Now I am open to other systems; we have one degree of commonality (Indian expatriate in the US in an Indian company).

The experience developed acuity in negotiating the international arena and cultivated skills in a multicultural business context.

Informal mentors and acquaintances aided expatriates in their transition in various ways, but when mentors were unavailable, the expatriates showed openness to new experiences and ability to deal with ambiguity which allowed them to persevere and get their work done while learning the ropes. Despite the frustration and stress it caused them, participants in the study found the experience a rewarding one.

> I was a potential name to go to Japan. They said well, we have this big transaction in Tokyo; you'll go there, work with different groups. It was kind of a job interview. And I spent 3 years there, and it was a terrific and positive experience. I'd do it again, those years; I'd make the same choice
>
> (US expatriate to Japan).

Although this analysis has focused on the mentors and social contacts providing support to expatriate adaptation and learning on international assignments, it would be remiss to overlook the key organizational role of the expatriates themselves as change agents and thus mentors for various constituents during their assignment.

The Tipping Point: The Expatriate Experience as Mentor

The final theme of the narrative analysis in this study is that expatriates themselves, play a significant organizational role as mentors on their international assignment. The experience of the expatriate requires them to find mentors to develop their awareness of the culture of a country in order to achieve success at their assigned

project. The project typically involved responsibility for the transfer of corporate culture, technology, or control systems to the international location, or to perform a combination of these functions. These responsibilities entailed mentoring others as they assumed the role of change agents and experts in their field. The two categories of this theme of the expatriate experience as mentor are: 1) the expatriate experience as coach for co-workers, mentor to subordinates, and advisor to the home office leadership during their tenure on international assignment, and upon assignment completion when they repatriated to the organization home office; and 2) the "reverse mentoring" from these constituents, creating a two-way learning and adaptation to initiate organizational change.

The expatriates shared their knowledge and expertise with host country colleagues. Depending on the objectives of the international assignment and cultural differences, the expatriate would receive various kind of feedback on their attempt to implement organizational change. One US expatriate was assigned to transfer organization culture from the US to China. The US corporate culture for this company included cooperative decision-making between managers and subordinates. This process was not the norm behavior for workers in China, who expected their supervisor to make decisions and dictate their work activity and thoughts. So the expatriate had to develop a method to mentor his Chinese team in participating in business decisions.

> …there were just times where I wanted to be a little bit more collaborative in my decision-making, and if that didn't happen then I would just take control. I would say, 'I'm deciding, and that's it.' But they're so used to that that I didn't want to do that all the time…So, I mixed it up. But you know, even with meetings and

training class, in order to get them to be more participative, I tried, but techniques

I would use I would maybe start with multiple choice. So if it's open-ended, *it's*

silence and they don't really participate. So what would I do? You know?

Because some of the training materials would come from [the US], and it would

all be very open-ended and *very interactive* and you *can't get that done in China*

or anywhere in Asia. So I would change it to be multiple-choice. So I would say,

'Do you think it's like this, like this, or like that?' And then they would say, 'well,

it's more like D than E.' And then you can go, 'Well, why?' And once it starts,

then it's [easier for them to say what's on their mind]…that multiple choice

strategy sort of worked for me at least. And so there were things like that that we

would do to tweak materials from the US

(US expatriate to China).

In this situation, using "multiple-choice" questions with his team enabled the expatriate

to cultivate collaborative decision-making. This mentoring process led by the expatriate

promoted buy-in and extracted insight from the local line managers, even though this was

counter to traditional Chinese business norms.

This illustrates the two-way teaching and learning process resulting in an

exchange of understanding between expatriate and his host country work colleagues. The

experience was not unique among expatriates in this study. They became skilled in

adapting home office processes and practices butted up against cultural and

environmental norms in the host country to accomplish organizational change.

Although several expatriates became adept at engaging in this two-way mentoring to reach their common goals, this was not an easy or smooth process. It was accomplished in varying degrees by each expatriate through an exchange between the expatriate's investment of time, expertise as well as awareness, receptiveness and willingness to adapt to the host country colleagues' culture and local ways of thinking about their interactions at work.

Crossing the Yellow Line: Knowing "When and How" to Challenge Cultural Norms

One US expatriate was sent to India on an assignment to improve manufacturing production processes and plant safety. His mentoring was a catalyst for change. He educated employees and enlisted a local engineer to draw up a plan enabling shop workers to develop their own solutions.

> We changed the structure to be the structure in our other plants, but in India, it was very difficult to make. [An Indian engineer with Six Sigma Black Belt experience] developed a plan…And he had worked in the US, was very familiar with what we wanted to do and so I gave all the ideas, worked together, and actually, we involved people from the shop floor on his team, which was a first. Black belt projects should [be initiated by high level managers] but it was actually the shop floor people who had a lot of the ideas for the changes. They went to travel to the suppliers with us…so we broke a lot of those molds. The cultural barrier…You know, and we were able to reduce inventory to about a half a million dollars…and now production increased…and [the employees told me], 'oh we need to change the schedule for a lot more flexibility'…everybody gave

me the ideas. Or I would see stuff that's like, 'why are you doing that?'...You

know. It's a waste of labor, time, and money.

I brought a lot of systems that were currently practiced in [the US and UK

and] to that plant, because they didn't know about it. So as I introduced them to

those processes and implemented them. They continue to use them. That type of

plant recently got a safety award from [the company] and from India's safety

council   (US expatriate in India).

This expatriate's expert knowledge from experience in plants in the US and UK

enabled him to implement change in the India plant. But the cultural differences in

India made organizational change tricky from several perspectives. In addition to

perceptions of hierarchy, India perpetuates values about social class and caste that

restricted interactions among plant workers.

India had much more cultural barriers than in the UK. It was very challenging.

There were some things [cultural practices] that need to be updated, and there

were some things that, I don't want to say 'I didn't respect,' but we can't have

them. Just because we're senior managers, we are no different than the floor

workers.

I remember the first time I invited shop people to participate in the safety

committee. The safety training was all the top leaders. And people in the safety

meetings were basically in production. So I saw…there was an opportunity. So I

said, 'okay, we'll have some the shop people come up.' And I invited them to the

boardroom. Well, shop people *don't come* to the boardroom. That's for executives

only. I said 'well, they're going to be here now. They're part of this team.' They

actually became, this shop team actually, became the leaders. They became the

doers. They became the motivators…they were not empowered before. I was

known as the first manager that 'crossed the yellow line,' because managers never

walked over the yellow line where the production worker was

(US expatriate to the UK and India).

The expatriate manager advocated implementation of change by ignoring the

protocol of managers staying outside "the yellow line" and including shop floor

workers in developing the solutions for plant process problems. The US expatriate

was open to this approach in face of the potential cultural clash with class and caste

value systems in India. Although these cultural values may have limited the

interaction of people from different backgrounds on the same work teams in the

India operation in the past, the expatriate manager seemed to orchestrate cultural

accommodations to achieve his assignment objectives. The expatriate relied on his

relationships with the host country employees to break through "cultural barriers."

Switching Roles and Giving Advice

The role of mentoring in this two-way exchange between expatriate and local

workers was often implicit. The expatriate was not consciously "mentoring" the host

country employees with his expertise nor were the local workers consciously pushing

back with their views on getting the job done. When there was agreement on the

work objectives, at times it was difficult to know if employees simply assented to an

expatriate to be polite and "save face" or if they actually intended to follow through

on being change agents.

> I did not have any formal mentoring opportunity when I was in India, although as
> I was there to assist with a transformation I did give a lot of advice on activities
> that needed to be implemented. In India, there is a very hierarchal management
> structure and depending on an individual's level of authority, most communication
> I found to be one way. Maybe it was because I was American, not quite sure, but
> I did find in the Indian culture, and was so told during my cultural induction to
> expect, that managers and employees will tell you 'what you want to hear' and
> not 'what really is.' So when I gave advice the response [from host country
> workers] was, "Yes, that is good" but was it really taken to heart for application
> and guidance? I was never sure. Sometimes I would see progress but other times
> not
>
> (US expatriate to India).

The participants in this study experienced cultural practices that made change slow or

imperceptible. This could be frustrating when the culture of the host country nationals

valued authority and hierarchy, so the host country employees would agree to

implementing change out of respect, but they were simply be telling the expatriate

manager "what they wanted to hear." Some expatriates received overt push-back from

their host country colleagues on the specific work they were assigned to accomplish.

> It was not uncommon for the home office leadership to send a very capable

employee overseas to train managers on technology transfer, or other change objectives,

while providing minimal management support or authority to the expatriate. For two expatriates, the local company politics combined with cultural views of authority limited their ability to build relationships with managers with whom they needed to collaborate to get their work done. One expatriate from the US to France found ways to build relationships by supporting the host country management initiatives, which seemed counterproductive to her assigned goals.

> *And while I don't think I was set up for failure…I wasn't set up for success either.* [My colleagues in France] wasted my time a lot over there. Their people were not very helpful…They had the director in the French side of the company [who] decided to launch a project and said his project superseded my project. So all of my resources were [redirected], and this happened in January and February, and I'd come there in October…Totally, all of a sudden I had to work on that project. So I would not point all fingers at France. I think that the US was putting obstacles and roadblocks in front of people who are on an expat assignment
>
> > (US expatriate to France).

Without being given proper authority, expatriates experienced resistance from host country nationals in cultures that value the chain of command. The US expatriate in France learned the cultural rationale for the obstacles, and discovered that persistence in building relationships enabled her to gain buy-in for the change among employees. Experiencing the break-through was satisfying, and often a window into understanding the complexities of working in another culture.

It really was upsetting that this gentleman wouldn't work with me…I know about

all the cultural issues. I've read all these different culture books, *but when you're*

in it and you're not getting a response because of the certain ways they're used to

answering. People always like to answer, 'Well, is it because you're a woman?'

Well, possibly, but I think it's bigger than that. It's more *hierarchical.* I was

requested to…deal directly with people, and I got my hand slapped. 'You

shouldn't consult with these people. You shouldn't set up a meeting with them.' It

happened sometimes in Germany, too. It happened in Switzerland, but not like in

France, definitely worse.

So to get things done in France takes a lot more maneuvering and a lot

more fancy footwork. But if you persevere, you know, finally this one guy he

said, 'Where do we move the equipment? …I said, 'All of the managers were in

the same room, and they all said this is how we're going to do it. So *what more do*

you want?' I took the piece of paper and I said, 'I'm not going to get a piece of

paper [with authorization]. *Just do it*.' And he said, 'Okay, chief.' So I said, 'I'll

take the heat.' It's *so* that way. The chain of command, people higher up were

much more concerned about the protocol. The people lower were much more

concerned about the blame

(US expatriate to France).

The expatriate was tenacious about meeting her objectives and figuring out the

'maneuvering and a lot more fancy footwork' to bring the locals along with her. This

expatriate did not feel supported by her manager or the home office leadership in accomplishing the goals of her assignment.

It was not unusual for expatriates to inform the home office leadership that the assignment could not be achieved as planned because of cultural issues.

Taking the Knowledge Back Home: Mentoring Colleagues in the Home Office

"If it was based on the headquarters' philosophy, things wouldn't work."

(US expatriate to China)

Several expatriates experienced conflict when they recognized the need to adapt corporate systems and policies to meet "local" culture and legal system constraints during their assignment. They basically explained to the home office leaders, "We can't do it that way in this country." This upward, or "reverse mentoring," was described by about half of the expatriates, who had the authority to make salary decisions and major system changes on assignment.   One explained that he had sat on both sides of the fence and his expatriate experience gave him a window into seeing the local issues that warranted a different approach.

 I actually had the whole thing under me in China. And I wasn't sitting in the ivory tower dictating these things [from headquarters], I was on the other side of the fence sending things to [the US headquarters] while the [Chinese managers are] going, 'You're crazy, that doesn't work here!' *But I learned while I was there*, really, because I didn't know the Chinese that well. Just by living there four weeks, and in the first few weeks I just noticed…certain things happening. So it was great learning for myself, too   (US expatriate to China).

Eventually the expatriates in this study who proposed adjustments received approval from leadership in the home office to implement revised standards, but not without back and forth negotiation and stress. The expatriates who encountered these situations developed unique skills in "coaching their boss" on cultural differences.

The conflict created by the home office inflexibility was extremely frustrating and stressful to the expatriate. Expatriates from two different US companies faced problems with the home office compensation system because societal convention in China and Venezuela was for managers to receive large jumps in salary when they were promoted to supervisory positions as compared to the compensation structure in the US. These expatriate managers need to convince their colleagues and managers in the US to break the mold of the US compensation framework to match the local norms.

Yes, you know, *there's so many examples of headquarters dictating standardized processes that just don't work because of the dynamics of the business or because of the cultural differences.* And I do believe that there are some things that can be standardized even though it's against supposed cultural norms if you want that to be your brand, and I supported a lot of those things. But there were some *things that really didn't work from an HR perspective,* like linear pay rates for an emerging market like China didn't work. So you know, globally, [the company] had this structure in place and they wanted to implement it in China, and I said, 'you know, part of it I could implement, but the part where you

get to where you graduate to manager or supervisor, there's a big jump in terms of

people's pay'

(US expatriate to China).

This expatriate had to educate and persuade the home office leaders to adapt components

of the home office system work in another country. Participants in the study who were

US expatriates in India, Japan, China, Latin America and France described instances of

the US office advocating processes or enforcing policies that, the expatriate realized,

would not "transfer" to the host country business context. This necessitated another kind

of mentoring and "figuring it out:" finding a compromise and making a case for the best

solution to leaders who didn't have a clue as to why the best decision would to change

company policies for cultural or global market reasons.

The "reverse" problem occurred when headquarters absolved the overseas

manager from following US policies in a location based on the leadership

misunderstanding a specific national context of an overseas operation. The experience of

an expatriate in China was that the corporate office leadership made the erroneous

assessment that diversity training, though required in the US, was not necessary in China.

The US leadership assumed a lack of diversity and misgauged the cultural issues in the

Shanghi operation. The expatriate had to "mentor" his home office colleagues and

superiors about the relevance of diversity training in Shanghi:

> [US leaders] would say, "Oh, I'm sure you don't need any diversity training in
>
> China. So we will exempt you from those programs because [your employees] are
>
> all Chinese, right?"

And I said, 'No, they're Hong Kong, they're Chinese, and they're Taiwanese, they're Singaporean Chinese, and they're mainland Chinese, all in my offices. *We actually have issues. They are very different*, even the Shanghai Chinese from the rural Chinese have differences. And so I would like to implement a diversity training program.' It wouldn't be the same [diversity training delivered in the US], but [the leadership at the US headquarters] assumed that we didn't need any diversity training period. Kind of like, 'well, they're all Chinese anyway, so why would you need it?' So there were things like that, if it was based on the headquarters' philosophy, things wouldn't work

(US expatriate to China).

A Learning Opportunity Missed: The Invisible Repatriate

Repatriation presents another opportunity to mentor leaders and colleagues in the home office after completing their assignment. However, only one expatriate in this study successfully developed a process to share his knowledge with domestic colleagues. Even so, after he left the company, the process was not implemented, as explained by another expatriate who subsequently worked for the same company.

You know again, after I came back we instituted a global mentoring program. For things like that, so [the company] has something formal now. When I was there, there was nothing like that

(US expatriate who developed a cultural awareness mentoring program.)

From a US expatriate from the same company, who went on assignment two years later:

[The company tells you], 'Just you go over there, figure it out and we'll build it as
it happens.' *It wasn't helpful*. 'We've got a draft of a handbook'…the program
[for expat training]…was the same condition before, during and after [my year on
assignment]   (US expatriate to India).

Based on the experience of expatriates relying on former expatriates to support them

in their transition and long term adjustment on international assignments one would

expect this type of mentoring to be a priority.

Upon return to the home office, expatriates expressed some disappointment

and consternation that their organizations were not leveraging the knowledge of

international operations they had developed on international assignment. Most

expatriates performed "reverse" mentoring, demonstrated when the expatriate would

bring the home office leadership up to speed about "culture appropriate" policy and

procedure. Only two participants in this study were asked to share knowledge with

colleagues upon repatriation to the home office. The following example expresses

the expatriate's stress of being unappreciated and underutilized upon repatriation to

the home office:

So I had to come back at the end of my 3 years... Then the people in [the US
office] were thinking, 'well, we have our own problems right now, what are we
going to do with him now?' *That was hard, probably the most stressful thing* I've
even gone through in my career. And I'm not blaming…It was a challenge…I
think this happens in every company... [we] did a very poor job of saying, 'How
we could use this person?' [when he returns form an expat assignment]…

Here's an example…Well, two years ago, the senior partners from all over the

world kind of came in, talking [about] the global capabilities and you know,

getting in front of clients... [how to] help move forward that agenda…So they're

looking for [someone to fill] that role...Who is [the partner in charge] going to

select? Well he selected somebody who used to work with him when he was a

regular partner doing [domestic] work, somebody he trusts, somebody he knows.

Not someone who had…had global experiences that deal with the global firm...

This is where I think we fail. We don't look at that and say, 'You know, why do

we have a person [with international experience] in that position?' ...Well, really?

…why aren't we using these other expats to come back and provide a better take

on that. The answer is, when they come back they can make money [instead of

being valuable as an expert in international work]... So there is a challenge there

(US expatriate to Japan).

This particular expatriate is from a US-based company. Another American expatriate

was a repatriate twice, from assignments in the UK and India. During his first

repatriation, his company offered no support to find a position within the company upon

return from the UK or opportunity to use his international knowledge to mentor others in

the organization.

 I always considered them the opportunity of a lifetime. I never looked to be an

expat. I never looked for the assignments. I was asked if I would be interested in

these assignments. So it was one thing I had never, it was not in my career path or

my development plans…

It was different when I came back from the UK, different when I came

back from India and I had a role to return to. When I went to the UK, I gave up

my job because the company needed me in the UK as a technical expert. But

when it came time to come home, I had to look for a job. *What was I going to*

do? I took the first job that came up and I liked it; but I've done a lot of reading

on this. How people leave the company when they repatriate because there is no

plan for them. I do feel that the role I'm in today, those two [international]

assignments really helped me…because now I interface with the HR in England, I

interface with the HR in India…[I know these people.] Plus I have some

knowledge of the legal requirements in India, the legal requirements in the UK

(US expatriate to the UK and India).

The expatriate was able to utilize the knowledge he gained on assignment to the benefit

of the company and his own career advancement and personal fulfillment.

I have been asked to mentor people who are going to take assignments, a few

people who move on to the UK…they've had a lot of questions. But I have been

asked more by that employee's manager, not through a formal program…Where

you want to look for a place to stay, or whether some of the things, you know, the

company I think did a great job of preparing you, but there's a lot of things they

don't tell you. [you need to] Figure it out on your own.

(US expatriate who went to India).

Mentoring new expatriates and soon-to-be repatriates by repatriates might assist

expatriates return to productive positions within the organization and reduce stress about

their career path. Several expatriates reported that development and knowledge transfer

opportunities for the broader organization were lost upon repatriation to the home office.

Summary

Mentoring is a culturally defined experience. Across the participants in this

study, the expatriate experience of mentor roles and behaviors differed depending on

regional cultural perceptions. Among the 13 expatriates in this study, only two were

assigned a formal mentor; one was considered useful. In some cultures, a mentor is

expected to assume an authoritative role in providing instruction on work projects.

Expatriates experienced the influence of historical systems where organizational seniority

ensured job security and promotion. In these situations, there was no incentive to

improve performance and thus no need for "mentoring" to aid in that process.

Encouragement and qualitative feedback on work behavior was defined as "mentoring"

in some cultures but not others. In some cultures the experience of explicit, constructive

feedback given to a protégé from a mentor or peer could produce a sense of "conflict"

which was culturally unacceptable. The analysis of different experiences of expatriates

in this study lent themselves to interpretation into cultural categories of mentors.

New international assignees were proactive in contacting current or past

expatriates for advice on their impending work and cultural adjustment.   Upon arrival,

human resource professionals at the company home or host offices were relied upon to

bridge the cultural gap in logistical support and bureaucratic processes to access

communication technology, accommodations, and transportation on assignment. This

role was supplemented by information from expatriates (if available) and host country

colleagues and neighbors (in relationships developed over time), providing direction to new expatriates to get established and start working in their new location. Expatriates were tenacious about finding as many informants and advisors as possible to find the answers they needed to reduce anxiety and become productive throughout the duration of their international assignment. These resources often supplied cultural tips to help expatriates avoid committing cultural *faux pas* that could create obstacles to their work tasks and relationships with new colleagues in the host country. Conversely, some expatriates explained, in painful detail, the mistrust and delays caused by lack of advice and support, from both the home and host country offices, to finesse the subtleties of doing business in their host country. Short-term work assignments and prior business trips reportedly were "not the same" as adjusting to work as an expatriate, so home office managers usually were not prepared to mentor their overseas colleagues.

The role of the expatriates evolved during the course of their assignments. Expatriates developed the competence to advise company leaders and managers, who have limited first-hand experience with the overseas operation, to conduct business in ways that the expatriates learn work in another country. This is a result of "figuring things out" on their own and the two-way learning that was described in the participants' narratives in this study. The reciprocal learning facilitated by the expatriates acting as *mentors themselves to host country colleagues and vice versa* in technology transfer and organization development activities led these expatriates, in turn, to learn the cultural norms and socialize into the host country organization. Expatriates reflected upon their eagerness to learn, willingness to be flexible,

respectfulness of cultural differences, tenaciousness in difficult situations, and sense

of humor in navigating the complex political and cross-cultural issues on their

assignment. The expats were rewarded with a sense of confidence in their flexibility

and perseverance during their on-going learning process.

Repatriation offered the opportunity for expatriates to share their knowledge on

the nuances of culture affecting business practices, which they learned during their

international assignments. Based on the narratives in this study, organizations did not

facilitate expatriate knowledge transfer, which was acknowledged as a lost opportunity

for cultural awareness, organizational learning and improved transnational management.

In the following chapter, the findings will be discussed in the context of the extant

literature.

Chapter 5

A Discussion of the Findings

This section discusses the major findings through the hermeneutic analysis of the expatriate experience with mentors in the context of the extant literature on expatriate assignments, the dimensions of culture, and mentoring theory and practice. The three major themes of the findings are: 1) mentoring is a cultural phenomenon, 2) the experience of social support while coping with chaos on assignment, and 3) the changing role of the expatriate and their mentors during international assignments. Each theme will be presented in turn. Categories from the findings are consolidated and condensed into meaningful subthemes for purposes of the discussion.

Theme One: Mentoring is a Cultural Experience

The study of expatriate experiences with mentors on international assignments provides insight into how expatriate assignees develop knowledge, skills and attitudes to perform their work in international locations and meet the organization development objectives of their organization. The first theme of mentoring as a cultural phenomenon, challenges the notion that there is a universal definition for mentors, which appears to be the underlying assumption of the past research on mentoring expatriates. Different cultural understandings of mentor relationships were interpreted from the analysis of the expatriate narratives for this study. These findings are consistent with theoretical underpinnings of various theories of dimensions of culture, indicating that behavior has different meanings in different value systems (Hofstede, 1980, House, Javidan, et al, 2001; Kluckholn & Strodtbeck, 1961; Thomas, 2004; Trompenaars & Hampton-Turner,

1998). This finding suggests that researchers need to strive toward developing a mentor construct based on "derived" rather than "imposed etics" in cross-cultural contexts (VonGlinow, Drost, & Teagarden, 2002).

For the expatriate participants in the current study, experiences of mentoring on international assignments varied depending on their cultural backgrounds. *How mentoring behaviors were perceived and whether they were valued differed depending on the cultural background and thus expectations of the expatriate, which differed from those of their host country colleagues*. In this section, I will discuss how the extant literature on dimensions of culture supports the range of expatriate experiences of mentoring, representing regional cultural differences in regard to workplace attitudes toward hierarchy, communication style, and job performance. This finding suggests reevaluation of recent mentor theories on in the international context to take into account the construct of culture and the significant implications of cultural dimensions on mentoring in the international context.

Implications of Culture in Mentoring Relationships

The finding that mentoring is experienced differently according to regional cultural values of the expatriate is supported by theoretical studies on the construct of culture. Cultural norms, behaviors, attitudes, and values influence interactions in the workplace that affect mentoring practices as defined in the literature. One dimension of culture that presented an obstacle to mentoring was tight social in-groups (Triandis, 1989). Tight "in-groups" are characterized by close family relationships that may extend to work groups in collectivist cultures (Feldman & Bolino, 1999). It was difficult for

expatriates to "break in" to these groups in the role of mentor or protégé during their assignments in China, Japan, France, and India. As evidenced by experiences of expatriates in this study, these relationships develop over time and often host country groups are not open to accepting "outsiders" from other countries who are international assignees. Current expatriate mentoring theory acknowledges that "dissimilar newcomers are unlikely to receive social support and acceptance" (Mezias & Scandura, 2005, p. 528) into the new work group and recommended that future research should explore the "role culture may play in the development of mentoring in an international context" (p. 532).   Yet extant theory has proposed to remedy the lack of expatriate integration by assigning mentors in the host country to assist expatriates in their socialization on assignment.

Most expatriates were not given a mentor. None the less, the findings did not support the assumption in the extant literature that a formal mentoring program would facilitate mentoring in the host country. Site visits and short projects arranged in the host country to establish relationships prior to expatriate assignments did not break down the cultural boundaries for inclusion in host country in-groups. Indeed, research by Feldman and Bolino (1999) cautioned mentoring was less likely in societies characterized by the cultural dimensions of high power distance with authority and collectivism. Dalton (1994) points out that host country nationals may be resentful of the high salary and change agent role of the expatriate and not offer social or career support, which was the experience of the US expatriate assigned to Japan in this study. Furthermore, expatriates from these collectivist cultures to the US distinguished their experience with mentors in

their cultures from the mentoring process in western society. Their definition of mentors was qualitatively different.

Different Perceptions of Mentor Communication

Expatriates from India and France had opposite reactions to feedback received from mentors on their assignment in the US. The encouragement they received from their US colleagues was not how they perceived "mentoring." The expatriate from France expressed the need for more honest feedback in the US, whereas, the workers in India preferred to "never say anything bad about anyone." The French expatriate wanted his manager to communicate openly on the job, even if it was negative, while the Indian employees were concerned about "saving face" in the workplace. Thus expatriates from one culture valued candid developmental feedback and the other sought indirect communication on needs for performance improvement on-the-job. According to Dalton (1998), learning behaviors, such as learning on the job, seeking and using feedback, and soliciting relationship support, will play out differently depending on one's culture (p. 398), which was suggested in expatriate reflections in this study.

Although this study represents a small sample of expatriates from France and India, their experiences are consistent with the research on cultural differences in which regional "clusters" of cultural dimensions in the Anglo and Latin Europe cultures demonstrate a preference for the relatively aggressive, direct communication style (Javidan & House, 2001). While, in the Southern Asian cluster, the norm for conveying developmental feedback is that those in authority will use high context, indirect communication (Gupta et al., 2002). Neither of the French or Indian styles precisely

matched the manner in which their US organizations conveyed employee feedback. This aspect of US mentoring programs did not translate as well across cultures in practice as the theories proposed in expatriate mentoring literature make it appear (Harvey et al., 1999; Mezias & Scandura, 2005).

The US Mentoring Model: Lost in Translation

Three expatriates from the US had shared expectations of mentoring behaviors and objectives. Their notion of the role of mentors in career development and knowledge transfer was consistent with Harvey and Wiese (1998): mentors engage in sponsoring, coaching, counseling and advocacy for protégés with limited experience in a profession, culture, or specific work tasks. The purpose of mentoring, according to domestic US literature, is to guide professional development, provide personal support, and serve as role models (Kram, 1985) to employees. The role of two of the US expatriates was to transfer organization culture, which included instituting mentor programs on their international assignment. However, during assignments in the UK, India and China, US expatriates experienced a resistance to these kinds of mentoring programs because they did not "fit" perceptions of hierarchy and appropriate communication style in the host country operation. Reactions to instituting a mentor program ranged from confusion and offense to ignorance and questioning the relevance of the US mentoring process. As was revealed in the findings, expatriates had different cultural expectations about the mentor relationship, communication style, and purpose for employee development.

Two US expatriates introducing mentoring programs "struggled to make it meaningful" for employees in India and China. The organization expectation was that

employees actively participate in seeking feedback on work performance, which meant

managers and peers were to explicitly communicate employee weaknesses to guide

performance improvement. Throughout most of Asia, societal views of hierarchy and

"face saving" generally preclude such direct criticism or approaching superiors for

feedback or advice. The host country employees were conflicted not only by the mentor

system challenging their respect for hierarchy but also their engrained respect for

hierarchy preventing them from explaining to their manager their problem with the US

mentoring process. US companies often encourage managers to empower subordinates to

provide feedback to management on business decisions (Begley & Boyd, 2006) and

Asian employees had difficulty integrating these concepts into their work values. This

cultural conflict with the US mentoring style is explained by Dalton (1998): "Although,

in many Western cultures, failure to seek and engage in an opportunity [to give or seek

feedback] might be interpreted as lack of ambition or initiative, in other cultures

aggressive pursuit of opportunity could be interpreted as lack of modesty, or violation of

groups norms around interaction of opportunity, age and seniority" (p. 398). This

explanation resonates with the US expatriate to China, who was aware of the history of

seniority systems in China that ran counter to the US merit-based system. Thus, he had to

educate his employees on the value and purpose of mentoring as a tool to guide employee

development in improving performance and preparation for participating in management

of a US organization.

Perceptions of Hierarchy Influence Mentoring

The US expatriate to France experienced the importance of hierarchy as an impediment to finding a mentor on her assignment. Although this expatriate made the effort to follow guidelines of extant research on "best practices" to prepare herself for the expatriate assignment in France, (she spoke French, knew "the cultural issues," and "read all the culture books"), she had to learn "the hard way" that her French colleagues were simply "more hierarchical" than she was accustomed to in her own culture. This expatriate was a veteran expatriate in Europe and was sent on a site visit to receive a realistic job preview prior to her assignment. Her site visit was intended to ensure she met with her French colleagues, with the expectation that they would support her in her role of implementing process improvements. Despite her preparation, her lack of assimilation with and mentoring from her French colleagues is consistent with the findings of Javidan, et al. (2006) on cultural differences between the US and France:

> The American manager in our scenario will face a very different experience with his or her French team. These managers will experience much more formal and impersonal relationships among the team members. They…due to their high power distance, have a more bureaucratic view of leaders. So the American manager…needs to tone down on the personal side of relationships and be much more business oriented. The manager also has to be more careful and selective in contacting other executives and stakeholders. Their preference for high power distance may curb their enthusiasm about meeting with someone if they feel it was a waste of time and of no clear value to them. Their low humane orientation

culture may mean that they are not particularly interested in being supportive of

others, even in the same organization, especially if they are from separate in-

groups (Javidan et al., 2006, p. 79).

This interpretation of the meaning of French behavior illustrates how culture dictates

whether mentoring is a viable option internationally.

The expatriate needed to discover "on her own" how to get her work done within

the French cultural parameters. She encountered a steep learning curve even as an

experienced expatriate for a US company operating in a western culture. The expatriate

learned the French company chain of command requirements to "get permission" from

management to coach their production teams on process improvement, even though these

French managers and production workers knew this was the objective of her assignment.

Her reflection on the situation was: "while I don't think I was set up for failure…I wasn't

set up for success either. They wasted a lot of my time other there." Over time, she

developed one work relationship that offered her guidance. Even so, the cultural

dynamics of the assignment were difficult to interpret and thus more stressful than her

past expatriate assignments. This experience is consistent with findings by Shaffer et al.

(1999) that experienced expatriates are more inclined to interact with host country

colleagues to adjust on their assignment but that knowing the language is correlated with

increased job tension on assignment, perhaps because the expatriate knows when the host

country nationals are obstructing progress on projects. This situation reaffirms that

culture may affect employee willingness to mentor and be mentored (Feldman & Bolino,

1999, p. 68).

The Significance of "Imposed" Rather than "Derived" Etics

The study of expatriate experience with mentoring raises the etic and emic (Pike et al., 1967) dilemma in research in the international context: one of making a distinction between researching the meaning of behaviors in one culture as opposed to that which might generally be applied across cultures. I would argue that mentoring in the extant literature takes a US "imposed etic" (outsider) view of expatriate mentors when, in fact, the emic (insider) view would encompass several layers of culture which exist in the context of expatriate mentor research: expatriates are at once operating in a dualistic role with membership relative to their home office and the host country operation (Sanchez et al., 2002), which is an "expatriate culture" unto itself; and the expatriate has three potential relationships to the culture of the organization and the host country (home or host office; inpatriate, expatriate; or third country national) which would change the cultural context and meaning of mentoring. These paradoxical identities, which are the lived experience of expatriates, in combination with many factors that have been discussed in the literature (for e.g. relational, personal and professional purposes of mentoring; engaging as coaches, role models, job task teachers, career guidance counselors, etc.) create a complex matrix of conditions for the study of mentoring. Researchers who apply the term "mentor" universally to the expatriate experience may discount the uniqueness of the potential mentor relationships, and the interpretation of them distinguished by the cultural background and individual differences of expatriates, compounded with the cultural values of their potential social support in the host country

context. DenHartog et al. (1999) explain the etic and emic approaches in relevance to research across cultures:

> Meaning is gained relative to the context and therefore not transferable to other contextual settings...The rationale behind the culture-specific approach [versus the] cross-culturally generalizable distinction is the argument that behavior phenomena (in its full complexity) can only be understood within the context of the culture in which it occurs. The culture specific approach tries to investigate the phenomena and their interrelationships (structure) through the eyes of the people native to the particular culture…In contrast, the cross-culturally generalizable approach tries to identify lawful relationships and causal explanations across different cultures.

> Thus, if one wishes to make statements about universal or cross-culturally generalizable aspects of social behavior, these statements needs to be phrased in abstract ways. Conversely, if one wishes to highlight the meaning of these generalizations in culture specific ways, then we need to refer to more specific events or behaviors (DenHartog et al., 1999, p. 230).

The current US expatriate mentor literature delineates many specific behaviors attributed to mentors and correlates them to specific outcomes that were not part of the expatriates' mentor experience in this study. Von Glinow et al. (2002) recommends comparing the "best practices" in one culture to those of another "such that the overlap can be considered to be a 'derived etic' (Berry 1990, in Von Glinow et al., 2002, p. 124) or a set

of results that will permit valid comparisons within the limited set of cultures compared,"
like the overlapping area of a Venn diagram.

What Mentor Construct is Measured?

In summary, the findings of the current study call into question *what is measured*
when expatriates are surveyed about mentors on an international assignment. The
literature on expatriate mentoring applies the domestic mentoring construct to the
international context but it was not a good fit for expatriates in this study. In the current
study participants of different nationalities were not in agreement on the term or
experience of mentoring. Mentoring did not transfer when a transnational organization
sent expatriates to implement programs in India and China. The risk of measuring the
"wrong construct well" drives home the importance of awareness of the etic and emic
view of a construct researched in the international context.

Extant studies of expatriates with mentors have relatively small sample sizes.
Carraher et al. (2008) explained the rationale for researchers circumventing the
measurement of cultural differences was the lack of statistical power when analysis is
broken down by individual expatriate culture. A study by Shaffer et al. (1999) did break
down the analysis of expatriate mentors by individual expatriate differences of past
experience, rank in the organization, and language ability, and the strength of the effects
on adjustment on international assignments changed significantly. Mezias and Scandura
(2005) admitted in their recommendations for future mentor research that "traditional
measures likely need refining" (p.533). Based on the findings of this study, one could
say that is that participants in past expatriate studies may have defined and experienced

mentoring in various, incomparable ways that would have serious affects on the validity

of the findings.

The next section discusses the expatriate coping strategy and the resources they

find to aid in their learning and adaptation on international assignment.

Theme Two: Coping with Chaos

Mentors did not play a prominent role in this study in the ways anticipated or

prescribed by extant expatriate mentor theory. As explained in the discussion of the

different cultural views of mentoring, only one expatriate in the current study relied on a

formal mentor and two mentioned the role of informal mentors in their transition to their

international assignments. There is no denying that expatriates sought social support for

their interpersonal interaction, work socialization and general adjustment to the host

country, but these connections were not considered "mentors." The extant literature

maintains that "multiple mentors" during various phases of the expatriate assignment

contribute to a successful experience and completion of international assignments

(Crocitto et al., 2005; Mezias & Scandura, 2005). Mezias and Scandura (2005) propose

that "utilizing a mentoring network can increase the success of the expatriate adjustment

and development, and knowledge assimilation and transfer. The key issue is not whether

one has a mentor, but rather who the mentors are and what their roles are" (p. 533). This

raises the question of what kind of information is provided by different sources, which

will be explored in this discussion.

The findings indicate that the chaos of the expatriate experience lends itself to

using different combinations of social contacts as needed at different points in time

during international assignments. The participants in this study elaborated on their needs-driven approach to gathering information to grapple with the ambiguity produced by work and life in another culture. Expatriates pieced together knowledge from mentors, human resource professionals, social networks, family support, and through relationships with host country colleagues and neighbors. These findings are consistent with Caligiuri and Lazarova (2002) that different social ties provide instrumental (logistical and practical information for daily life activities), informational, and emotional support to international assignees. The analysis of expatriate narratives showed not only some consistency in information needs across individuals, organizations, and assignments but also variation in the types of support sought during the phases of assignment, (predeparture, on-site in the host country, and repatriation) (Black et al. 1991). Expatriates particularly emphasized the urgency of expatriate support during the first few weeks of the assignment.

Different Information from Different Sources at Different Times

The expatriates in this study relied on multiple sources to answer their questions about work, logistics, and to provide personal support on their assignment. They reached out to social contacts to learn how to overcome obstacles to accomplishing their international work and daily activities. The most popular of these resources were fellow expatriates, who could assist in the "sense-making" (Harvey et al., 1999) of the host country environment. The findings show that expatriates with host country experience had the unique perspective of translating the norms and behaviors of one culture into a sensible explanation of "differences" by interpreting it through the lens of their own

cultural values and views. Expatriate mentor theory suggests that international assignees would benefit from a network of informal mentor relationships, not so long in duration or as deep as domestic mentoring relationships (Harvey et al., 1999) to guide them in personal, professional and relational areas. Furthermore, Mezias and Scandura (2005) proposed organizations should facilitate "peer mentors" on site in the host country location to ensure a successful experience and completion of international assignment (Crocitto et al., 2005). Indeed, many of the expatriate relationships described in the findings of this study were short-term. The narratives revealed that brief interactions with colleagues were necessary at different points in time, to find answers about one aspect of one phase of the international assignment. Although expatriates did not consider the people offering these answers to be their "mentors," the experience of "informational, instrumental, and emotional support" provided by social ties on international assignments is consistent with findings of Caligiuri and Lazarova (2002).

Fellow expatriates were accessible to the majority of participants in this study and tended to understand the predicament of the new expatriate in dealing with the ambiguity of his or her role in a foreign operation and the peculiarities of a given culture. Different people offered assistance on an ad hoc basis over the duration of the assignment in legal, political and cultural norms as well as job tasks, personal logistics, and emotional support. The expatriates in this study relied upon fellow expatriates who were mostly peers, consistent with research that indicates peers provide them with more psychosocial support, personal feedback and information than organization superiors (Kram, 1985). In this study, family members also filled this role, smoothing the transition and helping

expatriates cope with the stress of international assignments. Arthur and Bennett (1995) found that the family situation was the most important influence on expatriate adjustment and a successful international assignment. Indeed, expatriates with family indicated they could not imagine how expatriates endure the assignment without the support of family.

Experiential Qualifications Set Apart Expatriate Mentors

Some newly assigned expatriates experienced a challenge in finding mentors with appropriate experience to offer direction on specific issues encountered in their assigned host country. Harvey et al. (1999) suggest that a formal mentor in the home office could aid an expatriate in making the decision to take an assignment, predeparture preparation, the expatriate transition to the host country, and repatriation process. In addition, they recommend that mentors have "first-hand knowledge" not only of the host country but also the expatriate home country, expatiate assignments, and the organization (p.32). Hypothetically, formal mentors meeting these qualifications would be desirable but none of the expatriates in this study discussed "home office mentors." HR professionals were an exception. HR professionals from the home office often made a difference in the transition to the host country, building trust between the expatriate and the organization when logistical matters were addressed efficiently and effectively. This theme has surfaced in past research on HR support correlating to expatriate organization commitment and intent not to quit (Guzzo et al., in Shaffer et al., 1999.). However, a couple of the participants in this study pointed out that HR professionals rarely had international experience and indicated this lack of experience hampered HR effectiveness in providing services to international assignees. Begley and Boyd (2003) also found

negative consequences from the reality that HR professionals have limited first-hand exposure to international assignments.

Expatriates indicated that a substantially different set of qualifications were needed to mentor international assignees at this phase in their careers than while they were in the home office. There was a scarcity of home office managers with expatriate experience who were qualified to offer mentoring with a realistic global perspective. This may explain the findings that "surprised" Carraher et al. (2008) in a study that showed a correlation between home office mentors for expatriates with a significant positive effect on organization knowledge, job performance, and promotion but a negative effect on expatriate organization identification and job satisfaction. Research has shown that informal mentoring relationships establish a better understanding between the mentor and protégé and that formal mentoring can become "marginal" when the mentor is disengaged (Mezias & Scandura, 2005) from the needs of the protégé (Ragins et al., 2000). In the current study, time zone differences and work demands made it difficult to maintain contact with a home office mentor, for expatriates who had a mentor prior to leaving on assignment. Also, the findings exposed the tension experienced by expatriates when home office leaders resisted or ignored the expatriate's recommended culturally sensitive approaches to doing business overseas given the particular cultural, economic, political, and social environment of the assignment.

Extant mentoring research advocates that organizations implement formal mentoring programs as a complement to relevant selection, expatriate training, and ongoing support for international assignees (Feldman & Bolino, 1999). However, in this

study, none of these activities gained traction in practice. The majority of expatriates

indicated their organizations took past international experience into account in the

selection process. This is further evidence of the low priority companies have for

investment in expatriate preparation and training, (Oddou, 2002; Jassawalla et al., 2004).

But rather than relying on mentors, the expatriates were inclined to "figure out" new

systems, meanings of behavior, and styles of communication on assignment "on their

own." The relationships developed with host country colleagues facilitated expatriates'

learning how to collaborate in a culturally sensitive manner and proved instrumental for

expatriates to implement organizational change. The host country colleagues often

provided "on-the-job" insights into local systems and behaviors that were not readily

apparent to outsiders. Even after years of living in the host country, expatriates were

learning the nuances of business and social practices in another country. This echoes

Dalton's (1994) assertion that "critical management and leadership skills are learned

from experience" particularly for international managers (p.397).

In summary, although proposed theory for mentoring expatriates includes formal

or informal, multiple peer or a network of mentor relationships, the haphazard nature of

information demands on expatriates required expatriates in this study for them to collect

information from individuals with a wide range of knowledge and experience that did not

resemble mentoring in the sense of career development.

Theme Three: The Mentor Role Changes Over Time

The final theme of the findings encompassed the emerging role of expatriates

being mentored while mentoring others in the organization with the knowledge they

gained on international assignments. There was exchange of information between expatriates and their host country colleagues in a reciprocal learning experience and then sharing their knowledge of the local operation with the home country leadership. Although the findings show that the majority of the expatriates in this study relied primarily on their peer expatriates in offering advice to manage expatriate anxiety and stress on assignment, host country colleagues had the potential to play an important, two-fold role in accomplishing the objectives of the assignment: They could explain local legal, social, and environmental restrictions in the industry that expatriates may not have learned in training or from other expatriates, and the host colleagues could learn the objectives and incentives for integration of home and host country process improvement, organization culture, and management control from the expatriate. Meanwhile, over time, expatriates learned the cultural nuances of accepted work behavior and practices in the overseas operation during their on-the-job cultural assimilation.

Getting Past the Cultural Barriers with Host Country Nationals

It took time to develop relationships with the locals. They needed time to check out the expatriate. Several expatriates were surprised by the stress and learning curve they experienced to adjust between western countries on international assignments. Expatriates from the UK and France found their adjustment to the US was longer than to countries in Europe and Africa, respectively. Despite expatriate experience and effort, host country colleagues may not engage in mentoring relationships encouraged by their employer with expatriates during a relatively short international assignment. This scenario played out in the experience of US expatriates in France and Japan, who both

had considerable prior expatriate experience, yet faced seemingly insurmountable cultural barriers to forming relationships. This situation prompted Mezias and Scandura (2005) to "see a need for on-site mentoring relationships which better transfer specific cultural and task knowledge" (p. 533) to expatriates, but this recommended approach does not address how to overcome the barrier to expatriates' acceptance by the in-groups of the host country work environment. There might be a tendency to conclude that the cultural distance (Black & Stephens, 1989) between the expatriate country and that of their host operation would present an obstacle to expatriates getting their work done. This proved to be true in some respects but was not always the case.

Expatriates often worked in multicultural work groups and encountered challenges with cultural differences in the workplace, but emphasized their enjoyment and productivity rather than the conflict presented by their multicultural composition. The cultural tension experienced on various assignments by the expatriates in this study is consistent with the literature on facing cultural novelty (Black & Stephens, 1989), conflict in multicultural teams (Brett et al., 2006; Vodosek, 2006), dissidence with expectations of the home office (Begley & Boyd, 2003), and cultural adaptation on international assignment (Shaffer et al., 1999). Nonetheless, counter to the extant research, there were expatriates in this study that highlight experiences of success on work assignments in regions of great cultural distance compared to the expatriate's native culture. The findings show the expatriate passion for learning about other cultures despite their frustration along the way, and willingness to acknowledge cultural

differences while advocating and obtaining buy-in for change of traditional business customs led to process improvement and organizational change.

Intercultural Background Eased Cultural Distance: Individual Responses Vary

The findings indicate that relevant training and individual expatriate skill and traits may have reduced tension and increased collaboration between the expatriate and host country co-workers. US expatriates to China and India faired well despite cultural barriers, but their backgrounds were unique in that they each grew up in multicultural families. Thus their exposure to cultural differences in their formative years may have made them more sensitive and resilient to cultural adjustment while adept at developing deep relationships and trust with co-workers and subordinates over time on international assignment. This might be explained by Harvey (1996), who indicates that expatriates from the parent country may have a harder time adjusting to cultural novelty than third country nationals, who tend to be more culturally sensitive and empathetic.

The US expatriate to India mentioned multiple instances in which specific culture training, which he had attended for three days prior to his assignment, prepared him for interactions with Indian colleagues and subordinates that, when confronted by value differences that could have impeded his progress in building relationships, fostered collaboration and enabled him to accomplish the objectives of his assignment in India. This particular US expatriate achieved considerable headway in his second international assignment to work in an Indian plant for six months, where he observed the "cultural barriers" to be much greater than on his earlier assignment to the UK. If one were to compare research on cultural dimensions and leadership style preferences between these

countries, the US is more similar to the UK than India (Gupta, et al., 2002; Javidan & House, 2001, Javidan et al., 2006). This expatriate, being the lone US expatriate in India, had no veteran or peer expatriates to offer him guidance on his assignment. Perhaps this expatriate's individual experience and traits combined with his formal culture training account for his ability to achieve success in both locations despite the level of cultural novelty and tensions associated with his wide cultural difference with Indian values. He invested time to know many employees by name, which may have contributed to his popularity, earning the respect and the buy-in of his host country team.

Learning Orientation of Expatriates Fosters Cooperation On-the-Job

The findings reveal the US expatriates to India and China each displayed qualities of a benevolent leader (Gupta et al., 2002) by showing concern for the in-group needs and regional cultural norms. This earned the trust of host country nationals in the workplace to pave the way to orchestrate organizational change. The US expatriates in India and China recognized host country employee preference to defer to their manager in making decisions and to respect their leaders (Javidan & House, 2001). Yet these expatriates found ways to encourage their subordinates to share local expertise with them, enabling the expatriate to make optimal business decisions by co-opting employee input. Cultures in China, India, Japan, and Venezuela generally exhibit high uncertainty avoidance and high power distance for positions of authority, placing a premium on relationships with in-groups (Javidan et al., 2001). Expatriates working in these cultures developed their cross-cultural awareness and business savvy to adapt to the needs of their host country colleagues and business environment and achieved organizational objectives

of their assignment while preserving face of host country management. According to

Spreitzer et al. (1988, in Dalton 1998), the "learning oriented behaviors" demonstrated by

these expatriates sets them apart to be inclined to be particularly effective on international

assignments. The behaviors that expatriates conveyed in their narratives that match those

identified by Spreitzer et al. include: uses feedback, seeks feedback, cross-culturally

adventurous, seeks opportunities to learn and is flexible. These behaviors include

expatriates adapting to the style of feedback offered in the culture of the host country in

order to respond appropriately to colleagues and subordinates on assignment. These

experiences exhibited the expatriates' cultural intelligence (Early & Ang, 2003; Thomas

& Inkson, 2004) in their awareness of local norms and a willingness to continue learning

and adjusting to work and life in the host country.

The cooperation of the host country subordinates and colleagues aided the

expatriates in implementing knowledge transfer, organizational culture change, and

process improvements on their assignments. In addition, the expatriates in China and

Venezuela enlisted the support of their spouses, who were fluent in the language and

familiar with the culture, and thus uniquely qualified to interpret situations that were a

mystery to the expatriate.

Expatriate Changing Role: From "Figuring things out" to Mentoring Leaders

Expatriates demonstrated a keen willingness and motivation to learn about the

host country culture and apply their knowledge to accomplish their work. As expatriates

figured out differences between their home and host country organization systems, they

could advocate for changes in policy, process, and practice to accommodate host country

differences as needed. The expatriate's role in listening to host country operational needs and conveying the organization's business objectives appeared to be instrumental in fostering collaboration with the local colleagues and executing organization change. The findings show that expatriates experienced a new sense of confidence and achievement through their perseverance in finding resources to support their needs for learning about their new job and adapting their behavior to fit into their host country environment. Relationships with host country colleagues were a crucial source of information to put pieces of the puzzle together on international assignments. The solo expatriates in this study, assigned to a location without the support of recent or current expatriates, relied on their own initiative and assertiveness to develop host country connections to "figure out" how to perform their work and advance their career. Shaffer et al. (1999) emphasize the importance of role clarity and job design for expatriates as well as cross-cultural training for expatriates and their co-workers to successfully achieve their goals on assignment.

Through interactions with host country nationals, expatriates frequently learned they could implement the change prescribed by headquarters, but not in exactly the same way as the home office did it. This required the expatriate to understand the social norms, organization politics, local laws, and other external factors influencing the business environment of the host country. The best source of this knowledge was the host country colleagues. The next challenge of the expatriate was to explain to the home office leaders that they needed to change the way they did business to accomplish their goals in the locality of the international assignment. There are many examples in the literature of expatriates being sent overseas to do the bidding of the home office, in the

absence of leadership awareness or concern for the regional factors that would prevent headquarter policies and practices from gaining traction transnationally (Adler, 2006; Begley & Boyd, 2003; Graham & Lam, 2003; Tung, 1989). The difference in this study is the experience of several expatriates in successfully listening to and understanding the local needs for adjusting the standard operating procedures. They delivered the message for change to the home office and negotiated the revised version of the plan for implementation of change in the host country.

There could be breakdowns at any point in the communication process and it worked for several expatriates better than others. Crocitto et al. (2005) proposed a model representing the expatriate cycle of learning, showing the process of the expatriate gaining an awareness of the cultural, environmental, and organization norms for doing business in the host country while building a bridge between the social capital of host and home country mentors. I developed a similar model, but, based on the findings of this study, there were no "home office mentors," as Harvey et al. (1999) and Mezias and Scandura (2005) recommend for expatriates, and the knowledge transfer to the home office is incomplete. Based on the experiences of expatriates in the current study, the expatriates rely on host country colleagues and subordinates to problem-solve ways to meet organization objectives while complying with norms and structure of local systems.

Crocitto et al. (2005) proposed the transfer of "tacit knowledge" from the expatriate regarding unique needs and practices in the host country to the home office, focusing on the expatriate as a channel for maintaining social capital and conveying knowledge to facilitate smooth global operations. According to Mezias and Scandura

(2005), this knowledge transfer presents the opportunity for home office leaders and "mentors [to] learn new skills from their protégés [and] gain information about international operations without having to go abroad" (p. 531). Unfortunately, expatriates in this study attempted to develop these channels but they were unsustainable without corporate support. There was a lack of intention in the US home offices to recognize and leverage the value of the expatriate role in international organization development and make the knowledge they gained a priority to transfer for broader organizational learning. Although the findings of this study show some leaders in the home office eventually conceded to making accommodations to address local operational needs during organization development, the expatriates were not encouraged to share their experience or expertise from the international assignment upon repatriation. In a nutshell, there was inertia within the organizations to retain knowledge and conform to practices that are a cultural "fit" with the home office.

Repatriation: A Missed Opportunity

When repatriates were asked whether their company had utilized their knowledge and understanding of their host country gained on the international assignments, except for one expatriate, the answer was no. So the learning achieved by expatriates was theirs alone to take in their career; they were not asked to mentor other expatriates or managers on international assignments or in managing global operations. To date, one-third of the expatriates in the study have left their company and another two were looking for opportunities outside their company, which is consistent with the literature that many companies do not find ways to utilize the skills or share the knowledge expatriates

develop on international assignments (Ronen, 1989; Tung, 1998). The expatriate's experience requires developing an expertise in putting the pieces of the puzzle together in creative ways, solving problems on their international assignment by adapting organization practices to meet the needs of local operations. This is a valuable skill in international management. But when an expatriate takes a job at another at another organization soon after returning from their assignments, the learning opportunity for the organization is lost.

The US expatriate to Japan summed up his organization's treatment of repatriates this way: "This is where I think we fail. We don't look at that and say, 'You know, why do we have a person in that [global planning] position? ... Well, really? Well why aren't we using these other expats to come back and provide a better take on [our international work]?'" Presumably, retaining the knowledge of international operations is part of the goal of sending an expatriate overseas. Most of the organizations represented by expatriates in this study have yet to adapt their priorities to follow through with the career development of the repatriates, who were targeted not only to accomplish an international assignment but also to fulfill their future role as a knowledgeable global manager.

Limitations of the Study

The findings of the study are not generalizable to the entire population of the expatriate experience with mentors in adapting to their international assignment. Qualitative research has several limitations owing to the small, purposeful sample. The intention of this study was to understand the expatriate experience, which required rich description of the expatriates' reflections of their assignment, and their willingness to

recount the resources that aided in their adaptation and socialization to life and work on assignment. The findings represent the experience of individuals who served as expatriates for their organizations in the past five years, some of whom were currently on assignments, for not more than five years. The thirteen expatriates who participated in this study were associated with one of eight companies with international operations representing several industries.

The expatriates responded to the research proposal they received through their work email. Thus the organizations and participants were purposefully but not randomly sampled. It is possible that the expatriates who decided to participate in the study were influenced by an extremely positive or negative international experience, which would not be representative of the population. Also, the organizations represented in the study may offer expatriate packages, work assignments, or accommodations that are not representative of all organizations deploying international assignees. The organizations were public and private corporations, and partnerships, based in the US, UK, and India. The findings could be influenced by the home and host country locations and other possible characteristics of the international assignment and individuals' past experiences as expatriates or otherwise.

The hermeneutic methodology requires the researcher interview participants and interpret the narratives to produce the findings. The age, gender, nationality, educational background, or other characteristics of the participants or the researcher could influence the participant response to interview questions. There is always a possibility that the narratives do not include all information relevant to the research questions, or that the

researcher misunderstood the intended response. The participants could choose to share certain aspects but not all of their experience, so the researcher does not know what the expatriate experienced but "did not say." Any of these biases or omissions would give an incomplete picture of the experience of mentors and other sources of support on an international assignment that could be material to the findings.

Transferability of the Findings

The expatriates interviewed were from several companies and, as such, their experiences may be a reflection of a specific company's selection, training, corporate culture, national culture, and other systems and practices. Though this is a purposeful sample, it is possible that only the satisfied and successful expatriates responded to participate in the research sample (or the reverse). Findings about the expatriate's adaptability, resourcefulness, relocation services, human resource functions, communications issues, and the value of family and co-worker support could be influenced by the expatriate's number of years work experience, work role, level in the organization, personality, business expertise, knowledge of and ability with the host country language, past experience living in country of assignment, age, gender, number and age(s) of family members accompanying the expatriate on assignment, geographic or cultural distance from their home country, past expatriate experience in another country, kind and degree of cultural adaptation required, and climate, among other variables.

Every company has a different selection process for employees who become expatriates. This process could have an impact on the success of the assignment and expatriate experience. Most organizations represented in this study required employees

to have prior overseas living experience to be sent on assignment. This distinguishing

selection criterion could limit generalizability of findings to other companies with similar

screening protocols. Also, in different jobs, expatriate employee interaction with host

country managers could be more (or less) dictated by corporate culture which could

buffer the susceptibility to cultural differences that could cause conflict and

miscommunication. These nuances were not be explored in this study. The transferability

of the findings will be in reference to a time period of expatriate assignment between

2004 and 2010.

Summary

New knowledge gained from this study is that the construct of mentors is affected

by the cultural context and background of the mentor and protégé. Mentoring

relationships and concepts of mentors were influenced by an expatriate's values and

preferences regarding hierarchy, in-groups, and communication style and the

corresponding behaviors of loyalty, face saving and indirect or direct communication,

among others. Thus, the findings indicated limited applicability of US style mentoring

programs across cultures and called into question the validity of measuring outcomes of

"mentoring" relationships in an international business context.

In this study, formal mentors were not enlisted to supplement experience and

training in expatriate career development during an international assignment, as theorized

in the literature on expatriate mentors. However, the findings show individual differences

of expatriates, cultural differences with the host country, and the immediate needs for

relevant information and personal support in various locations led to reliance on a variety

of forms of social support to make sense of the challenges of an international assignment. Expatriate peers offered guidance and support, interpreting host country differences, while host country nationals, given the time and sensitivity to develop relationships, provided insight into local norms, values, and business practices.

Expatriates resorted to the experience of "figuring it out on their own," when they found themselves unprepared for certain aspects of an international career move. The expatriates in this study expressed frustration, at times, over the negligence of their organization in providing support and training. With the exception of one, organizations represented by participants in this study did not make the most of the knowledge expatriates gained from their international work after the assignment was completed. On the other hand, there was a sense of adventure, excitement and confidence for each expatriate in their ability to learn more than just a new job, but an entirely new social, economic and political system wrapped around their work. They learned from and sometimes mentored their host colleagues and home office leaders on executing organizational change in international operation.

These findings from the rich description of the expatriate experience reveal new knowledge and challenges to investigate in organization development as organizations strive to build talent suitable for global leadership positions. Conclusions from this discussion and recommendations for future research and will be the subject of the next and final chapter of this thesis.

Chapter 6

Conclusion and Recommendations for Future Research

The conclusion of this study presents the theoretical and practical implications for research on mentoring and expatriate development. Recommendations for future research will touch upon the importance of expatriate role in organization development and the cultivation of transnational managers on international assignments. Limitations of the study will be discussed.

Culture is Key in Mentoring

This study of expatriate experiences indicates that culture matters in mentoring. Thirteen expatriates from eight organizations participated in the study, sharing their experience with mentors and various sources of social support on their international assignments. The expatriates conveyed their different interpretations of mentoring and the reactions to mentoring from the members of the culture to which they were sent. Three expatriates from US organizations attempted to introduce mentoring programs characterized by American-style feedback intended for employee development that was resisted in China and India. Inability to implement mentor programs was attributed to the cultural context of the host country preferences for certain behaviors and attitudes in the workplace toward respect for hierarchy, chain of command, direct and indirect communication, and tightness of in-groups. Even in societies with considerable western influence, US expatriates on assignment in the UK, France, and Japan experienced different levels of mentoring and social support from the locals, depending on cultural differences. European expatriates found US communication styles and cultural awareness

to miss the mark for mentoring them on assignment. Feldman and Bolino (1999) suggested that individualistic, low uncertainty avoidance, and "small" power distance cultures are more receptive to mentoring. It could be that this finding simply indicates that the mentoring construct is a *product of cultural context* in individualistic societies, so mentoring fits the US cultural dimensions particularly well. Perhaps, for mentor relationships to work as defined in the domestic literature, the mentor relationships must be practiced in the US cultural milieu.

These findings call into question the validity of mentor studies that use "mentor indicators" such as role models, career assistance, and psycho-social support which may be perceived differently across cultures and were developed to assess behaviors specific to one culture. This leads to the conclusion that survey instruments developed in one culture may not be well suited to measuring mentor relationships in the international context. The finding that culture matters is widely recognized in international research, as past studies have been criticized for writing surveys in one language and from one cultural perspective (e.g. Gooderham & Nordhaug, 2002). More recent studies have taken pains to eliminate these cultural biases in international research endeavors (e.g. The Project GLOBE, House & Javidan, 2001). Thus, researchers need to be prudent in assessing the correlation of mentoring with organizational outcomes, especially for expatriate assignments, in which there are various combinations of cultures interacting between the organization headquarters culture and international locations in which inpatriates, expatriates, and third country nationals are assigned across operations. The

etic and emic constructs of mentoring need attention in future research and require refinement to ensure validity of on-going studies of expatriate mentoring.

Uncommonness of Expatriate Mentors

Expatriates in this study identified few mentors but many social contacts to provide information and support during an international assignment. Two of the organization home offices had formal mentor programs but only one expatriate enlisted the personal support of his mentor. Two expatriates identified informal mentors, one outside of his organization. The extant research has proposed mentoring as a complement to culture training and professional development for international assignees, but this mentoring did not materialize for the majority of expatriates in this study. My informants seemed to need multiple mentors to assist in the range of expatriate needs from cultural adjustment to work socialization. They found these themselves since expatriates, as reported in the literature, are often deployed without preparation (for e.g. Tung, 1998). The reality is that there are not a lot of qualified mentors to coach an expatriate in a specific culture. The problem is twofold: 1) the effectiveness of a mentor may be constrained by the cultural background of mentor and protégé, as explained earlier, and 2) the mentor needs to have experience in the specific overseas location of the assignment. In fact, expatriate interactions with home country managers in this study produced conflict over changing standard procedures to meet the operational realities of the overseas business environment. The home office frequently showed not only lack of awareness of the location norms, politics, laws, and business environment but also

neglected to open channels for repatriates to incorporate their knowledge into organizational learning for all employees engaged in international management.

The expatriates in this study demonstrated the flexibility, level of functional expertise, and variety of management skills needed to manage a transnational organization (Barlett & Ghoshal, 2003) but more research is needed on how organizations might support and integrate the expatriate "lessons learned" into organizational learning and developing global managers. Kamoche (2000) insists that organizations have to go "beyond skill formation and competence creation, to embrace the diffusion and transmission of knowledge across borders and cultures" (p.769). The lack of intention on the part of organizations to embrace and formalize knowledge gained on international assignments is a loss to the organization and appears to be at cross-purposes with the deployment and development of expatriate's international expertise.

According to Harvey et al. (1999), expatriates are deployed not only for traditional control and expertise reasons, but also to facilitate entry into new markets, and to develop international management competencies. The global economy has been emerging for decades. Extant research indicates that CEOs with international experience receive higher salaries correlated to their organizations attaining higher profitability than those without culturally aware leaders at the helm (Shay & Baack, 2004). Now developing countries are flexing their muscles in high growth markets and the successful organizations from these countries are agile, often employing managers trained in multiple cultures. The importance of international experience and knowledge continues to increase; organizations choosing to ignore the influence of culture will do so at their

peril. Yet almost two decades since Dalton (1998) asked a group of expatriates, "How has the organization used what you learned during your expat assignment?" Expatriates in this study shrugged as they provided the same response: no one had ever asked them to share the knowledge they gained on assignment (Dalton p. 392-393). Engaging expatriate workers in organizational learning will be an asset to transnational organizations that are as open to adapting to the changing world-market as individual expatriates they send on international assignments.

Experiential Learning Prepares Expatriates for Transnational Leadership Roles

The expatriates in this study demonstrated a propensity to continually engage in learning on assignment. They "figured it out on their own" when they were not mentored, trained or guided through the transitions necessary in their new work role and life overseas. They showed a knack for seeking out and enlisting host country nationals and other expatriates to assist them in their learning process and completing their assigned job. They reflected on the frustration but reward of their experiences in the process of continually coping with a certain level of ambiguity, which would appear to be excellent training for leadership roles in the dynamic global business arena (for e.g. Dalton, 1998; Mendenhall, 2006; Thomas, 2006). A group of researchers at the Center for Creative Leadership proposed that "critical management and leadership skills are learned from experience" particularly for international managers (Dalton, 1998). The expatriates in the current study showed an eagerness to learn and sensitivity to cultural differences, while remaining committed to accomplishing the goals of their international assignment.

In the style of a "protean career," expatriates in this study followed their individual, needs-driven career development agenda (Hall, 1996), to develop the intercultural understanding and international business acumen to execute their roles as organizational change agents. The experience of international assignees involved self-initiated and self-directed quests to find resources to guide and support them during an international assignment. These experiences reinforce the compelling need for organizations to select expatriates capable of "figuring out" how to find answers from various sources and to provide basic cultural and job role training to expatriates (Aycan, Kanungo & Sinha, 1999; Early, 1987; Tung, 1998) to ensure assignment completion.

Making the Transition from Mentee to Mentor

The expatriates' roles as organizational change agents presented an opportunity to become mentors themselves, evolving from primarily one in need of guidance on basic functions at work, to mentoring the host country team and integrating knowledge gained from their host country relationships in process improvement, transfer of organizational culture, and organizational control. Then they learned to negotiate with the leadership and colleagues back in the home office, educating them on local differences and proposing appropriate changes to policy, procedure, and practice to "fit" the local operational needs. This raises the question of what skills and abilities, or communication styles, enabled some expatriates to execute change with higher levels of collaboration and buy-in of their host country colleagues than others. The integration of knowledge to advance organizational change while accommodating local norms in overseas operations is at the core of leadership development lessons for those who aspire to roles as future

global managers in transnational organizations (Adler, 2008; Bartlett & Ghoshal, 2003; Dalton, 1998; Harvey et al., 1999; Kanter, 1995). It should be noted that individuals, like companies, vary considerably and some show higher levels of intercultural competence than others.

Implications for Practice

Organizations with international operations need to develop a high level of adaptability and receptiveness to cultural awareness not only in their expatriate workers but also all potential leaders. This study indicates that some organizations demonstrate a tendency to cling to ethnocentric ways for business decisions to be made and employee development performed. Research has found that organizations in some countries pay more attention to expatriates and acknowledge the importance of cultural awareness in international business better than others (Carraher, 2005; Tung, 1998). This consideration is increasingly prescient as newly emerging economies, such as Brazil, Russia, India and China, present their own flavor of doing business.

The Adaptive Organization and Emerging Economies

The organization practices and employee development of the future may be dictated by cultures dissimilar to the Anglo cultural dimensions, which have dominated business transactions over the past century. House and Javidan's (2001) extensive international research, Project GLOBE, relied on an integrated model and theory of culturally implicit leadership (IMCIL). In short, that theory asserts that organization leaders behave and make decisions in a manner consistent with their native culture, in turn influencing preferred, "culture specific" organization practices and policies, which

influence individual employee performance and perception of effective leadership behavior. The IMCIL theory is consistent with the finding in the current study that indicates mentoring is a cultural construct. Etic and emic concepts of mentoring need attention when researching mentor behaviors and mentoring outcomes for expatriates who work in different cultural contexts within the same organization.

The expatriate is constantly learning while developing his or her cultural understanding and international business acumen on assignment. Organizations need to engage in the same process and find ways to formally integrate expatriate expertise strategically across the organization.

Does Cultural Distance Make a Difference?

The interviews with expatriates in this study exposed individual differences of expatriates who achieved success as change agents in different cultures. Expatriates described completing their assignments and OD initiatives in the face of cultural novelty and unfamiliar workplace systems. Although research has indicated that cultural distance is a factor in expatriate adjustment to the host country and may have an impact on the expatriate's ability to perform their job or complete an international assignment (Black & Stephens, 1989; Black, et al., 1990) there were several expatriates in this study who demonstrated a particular skill in establishing trust and buy-in from host country nationals in culturally distant regions. The rich narratives from three expatriates exposed their family history and immigrant backgrounds, which they believed served them well in overcoming tough cultural barriers at work to their credit. These expatriates acknowledged that their aptitude for accepting differences and suspending judgment of

unfamiliar behaviors and culture-based norms exhibited by host country colleagues may be attributable to their intercultural upbringing. Examining the differences in cultural backgrounds of expatriates, in our increasingly multi-racial and multi-ethnic society, may shed light on different levels of intercultural competence demonstrated on assignment.

This study of the expatriate experience with mentors and other resources that aid in their adaptation to work and life on an assignment revealed new knowledge of mentoring, the expatriate capacity and motivation to learn, and their role in organization development in an international context. The study points to related avenues for future research delving into individual differences and cultural influences on organization development and development of transnational leaders.

Recommendations for Future Research

Future research on mentoring in international contexts might explore the meaning of mentors in different cultures. The hypothesis would challenge the generally accepted definition of mentoring and associated behaviors and investigate which aspects of mentoring transfer across cultures. Qualitative research in various industries would provide the in depth understanding of how mentoring is perceived and criteria would surface for the mentor and protégé role in the experience in specific industries, which were described differently across cultures in this study. Based on the findings of the current study, duration of social ties during international assignments are constrained by length of assignment, yet relationships with host country colleagues develop over time. Individual characteristics of expatriates may influence the ability to form bonds with host country nationals, which would be valuable to know. Hypotheses might be developed to

test interactions of expatriate intercultural backgrounds and depth of relationships with host country nationals. Most expatriates did not consider their social support or informational relationships "mentoring" but simply enlisting support from a friend, colleague or neighbor within his or her social network. Clarifying this distinction would determine the relevance of the term mentoring for this research stream in expatriate development.

Another avenue for future research may to delve into studying which organizations utilize knowledge from expatriates to inform the broader organization strategies for transnational operations. Do these companies outperform their competitors, and are some countries and industries are more receptive to multicultural awareness in transnational business than others? Additionally, investigation of organizational politics surrounding repatriate promotion and knowledge transfer may reveal the undercurrent of resentment or feelings that current leadership may feel threatened by the expertise gained by expatriates. These issues may be at the root of limitations placed on new ideas brought in from international assignees for organizational learning and adaptation.

Research on expatriates has tended to lean toward the investigation of the leadership qualities of expatriates. Future research could focus on the learning aspect of self-efficacy and the individual traits that make an expatriate seek and enjoy the challenge of constant learning presented by ambiguity of intercultural differences and evolving roles on international assignments. Understanding the qualitative success of each expatriate, and the subtleties of management approaches to organization change that "worked" in various international contexts, would be beneficial to the field of

organization development.   Finally, investigations for a deeper understanding of how

individual cultural backgrounds, especially those of expatriates with intercultural

families, influence management skills and the success of organizational change initiatives

in a cross-cultural environment will contribute to the field of international OD.

Qualitative research provides the rich description from expatriate experience that can

produce new insights and perspectives on skills and characteristics required for

transnational managers to adapt to the ever-changing dynamics of the global economy.

Reflections of the Researcher

During my review of the literature, dating back to Kluckhohn & Strodtbeck

(1961), it became apparent that, regardless of the extensive research investment made in

understanding cultural variations and the influence of culture on the workplace for

international assignees, organizations, practitioners of OD, particularly in the US, have

dawdled in ensuring support of expatriates. This state of affairs is disheartening. The

lack of organizational attention to individual career development of expatriates is a

"disconnect" from the research and strategies for talent management and succession plans

one would expect from a transnational corporation. I suspect an engrained ethnocentric

notion among some US corporate leadership, that their organizations will continue to

dominate global business and all foreign operations will subscribe, adapt, or converge

with the American management behavior and norms for doing business.

The stories of the expatriates in the current study are encouraging from the

standpoint that they represent future leaders, willing and able to learn to do business in an

intercultural environment. They anticipate change and find common ground or ways to

"morph" business norms and standards to "work" across cultures. Interpretation of their narratives indicated mentors are not the same across cultures or expatriates or assignments—mentoring is defined by culture. Nonetheless, each expatriate found social support to offer guidance to them during their assignments pursuant to a "protean," individualized development path customized to their needs at different points in their assignment.

The demands of hermeneutic methodology became clear once I started sorting and coding the data. Staying true to the individual stories of each expatriate while interpreting the meaning of the experience in the context of each assignment and then considering the relationships of themes to the collective meaning of all the participants was mentally consuming. I felt like I had to cram loads of data into my personal hard drive and process it. Then articulating my findings in a way that made sense, answered the research questions, and contributed to the collection of scholarly material on expatriate mentoring was daunting and at times a frustrating process. The qualitative approach encouraged an inductive style of analysis. In this case, that meant withholding the full disclosure of the research questions to the participants so not to "lead the witness" until the expatriates finished their interview. This process was counter to much of my doctoral training and stretched my capabilities as a researcher.

Narrowing the scope of the project, once I had read and reread the data, was the biggest challenge of the project. How could I leave valuable data on the cutting floor? Looking back and reading the final product, it would have been prudent to narrow my focus even more than I did. Next time, I told myself in the midst of coding multicolored

transcripts, I will do a survey and run SPSS. Then I would not hear voices of the

participants in my head, ascribing meaning to experiences that demanded to be heard.

Those experiences would have been depersonalized in a response to a survey item,

reduced to only one digit from a Likert-like scale. Many times I thought that responses to

a survey would have proved a grossly inadequate method to measure the expatriate

experience with mentors and would not accomplish my objective: to reach a deeper

understanding of the mentoring process and role of social support for expatriates.

It feels brazen to report findings that "call into question" the research methods

and constructs used by experienced scholars in the field of mentoring. Nonetheless, I was

pleased to find new knowledge, offer a critical view of mentor theory, and emphasize the

cultural aspect of being mentored, reminding the research community and practitioners to

incorporate culture into the analytical dialogue when studying international assignees.

References

Adler, N. (1986). Cross-cultural management research: The ostrich and the trend. *Academy of Management Review*, *8*(1), 226-232.

Adler, N. (2008). *International dimensions of organizational behavior*. Mason, OH: Thomson-Southwestern.

Äkerlind, G. S. (2005). Variation and commonality in phenomenographic research methods. *Higher Education Research and Development*, *24*(4), 321-334.

Amba-Rao, S. C., Petrick, J. A., Gupta, J. N. D., & Von der Embse, T. J. (2000). Comparative performance appraisal practices and values among foreign and domestic firms in India. *International Journal of Human Resources Management*, *11*(1), 60-89.

Ardichvili, A., & Kuchinke, P. (2002). Leadership styles and cultural values among managers and subordinates: A comparative study of four countries of the former Soviet Union, Germany, and the US. *Human Resource Development International, 5*(1), 99-117.

Arthur, M., & Rousseau, D. (1996). The boundaryless career as a new employment principle. In M. B. Arthur and D. M. Rousseau, (Eds.), *The boundaryless career* (pp. 3-20). New York, NY: Oxford University Press.

Aryee, S., Chay, Y., & Chew, J. (1996). An investigation of the willingness of managerial employees to accept an expatriate assignment. *Journal of Organizational Behavior*, *17*(3), 267-283.

Aycan, Z., Kanungo, R., & Sinha, J. (1999). Organizational culture and human resource management practices: The model of culture fit. *Journal of Cross-Cultural Psychology, 30*(4), 501-526.

Bandura, A. J. (1977). *Social learning theory*. Englewood Cliffs, NJ: Prentice Hall.

Bandura, A. J. (1986). *Social foundations of action and thought: A social cognitive view*. Englewood Cliffs, NJ: Prentice Hall.

Bandura, A. J. (2000). Exercise of human agency through collective efficacy. *Current Directions in Psychological Science*, *9*(3), 75-78.

Bartlett, C., & Ghoshal, S. (2002). Building competitive advantage through people. *Sloan Management Review*, *43*(2), 34-41.

Bartlett, C. A., & Ghoshal, S. (2003). What is a global manager? *Harvard Business Review*, *81*(8), 45-51.

Barnard, A., McCosker, H., & Gerber, R. (1999). Phenomenography: A qualitative research approach for exploring understanding in health care. *Qualitative Health Research*, *9*(2), 212-219.

Baruch, Y., & Altman, Y. (2002). Expatriation and repatriation in MNC: A taxonomy. *Human Resource Management, 41*(2), 239-259.

Baruch, Y., Steele, D. J., & Quantrill, G. A. (2002). Management of expatriation and repatriation for novice global players. *International Journal of Manpower, 23*(7), 659-671.

Bass, B. M. (1985). *Leadership and performance beyond expectations*. New York, NY: Free Press.

Bass, B. M. (1990). *Bass & Stogdill's handbook of leadership: Theory, research, and managerial applications, 3rd ed.* New York, NY: The Free Press.

Bassi, L., Cheney, S., & Lewis, E. (1998). Trends in workplace learning: Supply and demand in interesting times. *Training & Development*, *51*(11), 51-75.

Baugh, S. G., & Scandura, T. A. (1999). The effect of multiple mentors on protégé´ attitudes toward the work setting. *Journal of Social Behavior and Personality*, *14*(4), 503-522.

Begley, T., & Boyd, D. (2003). Why don't they like us overseas? *Organizational Dynamics*, *32*, 357-371.

Bem, D. (1972). Self perception theory. In L. Berkowitz, (Ed.), *Advances in experimental social psychology, 6*. New York, NY: Academic Press.

Bennett, M. (1986). A developmental approach to training for intercultural sensitivity. *International Journal of Intercultural Relations*, *10*, 179-196.

Bennett, M. J. (1993). Beyond ethnorelativism: The developmental model of intercultural sensitivity. In R.M. Paige (Ed.), *Education for the intercultural experience* (pp. 21-71). Yarmouth, ME: Intercultural Press.

Bennett, M. J. (2004). From ethnocentrism to ethnorelativism. In J. S. Wurzel (Ed.), *Toward multiculturalism: A reader in multicultural education* (pp. 62-78). Newton, MA: Intercultural Resource Corporation.

Bennett, M. J. (1998). Intercultural communication: A current perspective. In M. J. Bennett (Ed.), *Basic concepts of intercultural communication*, (pp. 1-34). Yarmouth, ME: Intercultural Press.

Berry, J. W. (1990). Imposed etics and derived emics. In T.N. Headland, K.L. Pike, and

    M. Harris (Eds.), *Emics and etics*. Newbury Park, CA: Sage.

Black. J. S., & Stephens, G. K. (1989). The influence of the spouse on American

    expatriate adjustment and intent to stay in Pacific Rim overseas assignments.

    Journal of Management, *15*, 529-544.

Black, J. S., & Mendenhall, M. (1990). Cross-cultural training effectiveness: A review

    and theoretical framework for future research. *Academy of Management Review*,

    15, 113-136.

Black, J. S., Mendenhall, M., & Oddou, G. (1991). Toward a comprehensive model of

    international adjustment: An integration of multiple theoretical perspectives.

    Academy of Management Review, *16*(2), 291-317.

Black, J. S., & Gregersen, H. B. (1991). The other half of the picture: Antecedents of

    spouse cross-cultural adjustment. *Journal of International Business Studies, 22*,

    461-477.

Black, J., & Gregersen, H. (1991). Antecedents to cross-cultural adjustment for

    expatriates in Pacific Rim assignments. *Human Relations*, *44*(5), 497-515.

Black, J. S. (1992). Socializing American expatriate managers overseas. *Group and

    Organization Management, 17*, 171-192.

Black, J. S., Gregersen, H., Mendenhall, M., & Stroh, L. (1999). *Globalizing people

    through international assignments*. Boston, MA: Addison-Wesley.

Black, J., Gregersen, H., Jensen, R., & Mendenhall, M. (2003). Seeing the elephant: Human resource management challenges in the age of globalization. *Organizational Dynamics, 32*(3), 261-273.

Bolino, M. C., & Feldman, D. C. (2000). Increasing the skill utilization of expatriates. *Human Resource Management*, *39*(4), 367-375.

Bond, M. H. (1988). Finding universal dimensions of individual variation in multicultural studies of values: The Rokeach and Chinese value surveys. *Journal of Personality and Social Psychology*, *55*, 1009-1015.

Borstorff, P., Harris, S., Field, H. & Giles, W. (1997). Who'll go? A review of factors associated with employee willingness to work overseas. *Human Resource Planning*, *20*(3), 29-40.

Brett, J., & Stroh, L. (1995). Willingness to relocate internationally. *Human Resource Management*, *34*(3), 405-424.

Brett, J., Befar, K., & Kern, M. (2006). Managing multicultural teams. *Harvard Business Review*, *84*(11), 84-91.

Briscoe, Dennis R. 1995. *International human resource management*. Englewood Cliffs, NJ: Prentice-Hall.

Brock, D. M., Shenkar, O., Shoham, A. & Siscovick, I. C. (2008). National culture and expatriate deployment. *Journal of International Business Studies*, *39*, 1293-1309.

Cafaro, P. (2001). Suits and savages: Why the World Bank won't save the world. *Organization and Environment*, *14*(4), 463-465.

Caligiuri, P., & Tung, R. (1999). Comparing the success of male and female expatriates from a U.S.-based multinational company. *International Journal of Human Resource Management, 10*(5), 763-782.

Caligiuri, P. (2000). The big five personality characteristics as predictors of expatriates desire to terminate the assignment and supervisor-rated performance, *Personnel Psychology, 53*(1), 67-88.

Caligiuri, P. M., Jacobs, R., & Farr, J. L. (2000). The attitudinal and behavioral openness scale: Scale development and construct validation. *International Journal of Intercultural Relations*, *24*, 27-46.

Caligiuri, P., & Lazarova, M. (2001a). Retaining repatriates: The role of organizational support practices. *Journal of World Business*, *36*(4), 389-401.

Caligiuri, P. M., & Lazarova, M. (2001b). Strategic repatriation policies to enhance global leadership development. In M. Mendenhall, T. Kuehlmann, & G. Stahl (Eds.), *Developing Global business leaders: Policies, processes and innovations* (pp.389-401). Westport, CT: Quorum Books.

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, 12*(3), 357-372.

Caligiuri, P. M., & Lazarova, M. (2002). A model for the influence of social interaction and social support on female expatriates' cross-cultural adjustment. *Human Resource Management, 13*(5), 761-772.

Caliguiri, P. & Hippler, T. (2006). Maximizing the success and retention of international assignees, In K. Lundby and A. I. Kraut (Eds.), *Going global: Practical applications and recommendations for HR and OD* (Chapter 12, pp. 333-428). San Francisco, CA: Jossey Bass.

Caligiuri, P. & Tarique, I. (2009). Predicting effectiveness in global leadership activities. *Journal of World Business, 44*(3), 336-346.

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*, *39*, 1310-1326.

Chao, G., Watz, P. M., & Gardner, P. (1992). Formal and informal mentorships: A comparison of mentoring functions and contrast with nonmentored counterparts. *Personnel Psychology, 45*, 619-636.

Church, A. T. (1982). Sojourner adjustment. *Psychological Bulletin*, *91*, 540-572.

Cohen, S. & Wills, T. A. (1985). Stress, social support, and the buffering hypothesis. *Psychological Bulletin, 98,* 310-57.

Collins D. B., & Holton E. F. (2004). The effectiveness of managerial leadership and development programs. *Human Resource Development Quarterly*, *15*(2), 217-239.

Conger, J. A., & Ready, D. A. (2004). Rethinking leadership competencies. *Executive Forum (Spring Issue),* 41-47.

Connerley, M. L. & Pedersen, P. B. (2005). Cultural frameworks and their importance for leaders. In M. L. Connerley & P. B. Pedersen (Eds.), *Leadership in a diverse and multicultural environment* (pp. 39-54). Thousand Oaks, CA: Sage.

Cooper, D. C. (2008). Expatriates as cross-cultural bridge builders: An ethnographic study. *10th International Conference of Human Resource Development Across Europe, 2009.*

Creswell, J.W. (2007). *Qualitative inquiry & research design: Choosing among five approaches*. Thousand Oaks, CA: Sage.

Crocitto, M., Sullivan, S., & Carraher, S. (2005). Global mentoring as a means of career development and knowledge creation: A learning based framework and agenda for future research. *Career Development International*, *10*(6/7): 522-535.

Dadush, U. & Bennett, S. (2010). The world order in 2050. *Carnegie Outlook for International Peace*. Retreived May 15, 2010, http://www.carnegieendowment.org/files/World_Order_in_2050.pdf

Dahlberg, K., Dahlberg, H. and Nystrom, M. (Eds.) (2008). *Reflective lifeworld research*. 2nd edition. Lund, Sweden: Studentlitteratur.

Dall'Alba, G., & Hasselgren, B. (Eds.) (1996). *Reflections on phenomenography - towards a methodology?* Goteborg, Sweden: Acta Universtatis Gothoburgensis.

de Janasz, S., Sullivan, S., & Whiting, V. (2004). Mentor networks and career success: Lessons for turbulent times. *Academy of Management Executive*, *17*(4), 78-82.

Den Hartog, D. N., House, R. J., Hanges, P. J., & Ruiz-Quintanilla, S. A. (1999). Culture specific and cross-cultural generalizable implicit leadership theories: Are

attributes of charismatic leadership/transformational leadership universally endorsed? *Leadership Quarterly*, *10*(2), 219-256.

Dalton, M. A. (1998). Developing leaders for global roles. In C. D. McCauley, R. Moxley, & E. Van Velsor (Eds.)*, The center for creative leadership handbook of leadership development* (pp. 379-402). San Francisco, CA: Jossey-Bass.

Earley, P. C., & Gibson, C. (1998). Taking stock in our progress on individualism collectivism: 100 years of solidarity and community. *Journal of Management*, *24*(3), 269-304.

Earley, P. C. (1987). Intercultural training for managers: A comparison of documentary and interpersonal methods. *Academy of Management Journal*, *30*(4), 685-698.

Earley, P. C., & Erez, M. (1997). *The transplanted executive: Why you need to understand how workers in other countries see the world differently*. New York, NY: Oxford University Press.

Earley, P. C., Ang, S., & Tan, J. (2003). *Cultural intelligence: Individual interactions across cultures*. Stanford, CA: Stanford University Press.

Earley, P. C., & Mosakowski, E. (2004). Toward cultural intelligence: Turning cultural differences into a workplace advantage. *Academy of Management Review*, *18*(3), 151-157.

Eberhart, C. P., & Pieper, B. (1994). Understanding human action through narrative expression and hermeneutic inquiry. In P. Chin (Ed.), *Advances in methods of inquiry for nursing* (pp. 41-58). Baltimore, MD: Aspen.

Feldman, D. C. (1989). Careers in organizations: Recent trends and future directions. *Journal of Management, 15*, 135-156.

Feldman, D. C. (1991). Repatriate moves as career transitions. *Human Resource Management Review, 3*, 163-178.

Feldman, D. C., & Thomas, D. C. (1992). Career management issues facing expatriates. *Journal of International Business Studies*, *23*(2), 271-293.

Feldman, D. C., & Thompson, H. B. (1993). Expatriation, repatriation, and domestic geographic relocation: An empirical investigation of adjustment to new job assignments. *Journal of International Business Studies, 24*, 507-529

Feldman, D. C., & Bolino, M. (1999). The impact of on-site mentoring on expatriate socialization: A structural equation modeling approach. *The International Journal of Human Resource Management, 10*(1), 54-71.

Feldman, D. C., Folks, W. R., & Turnley, W. H. (1999). Mentor-Protege diversity and its impact on international internship experiences. *Journal of Organizational Behavior*, *20*(5), 597-611.

Fetterman, D. M. (2009). Ethnography step by step, 2nd ed. *Applied social science research methods series, 17*. Thousand Oaks, CA: Sage Publications.

Finlay, L. (2003). Through the looking glass: Inter-subjectivity and hermeneutic reflection. In L. Finlay and B. Gough (Eds.) *Reflexivity: a practical guide for researchers in health and social science,* (pp. 1-25). Oxford, Blackwell Publishing.

Fiske, S.T., & Taylor, S.E. (1984). *Social cognition*. New York, NY: Random House.

Ganster, D. C., Fusilier, M. R. & Mayes, B. T. (1986). Role of social support in the experience of stress at work. *Journal of Applied Psychology*, *71*, 102-110.

Gibson, C., Kirkman, B., & Lowe, K. (2006). A quarter century of culture's consequences: A review of empirical research incorporating Hofstede's cultural values framework. *Journal of International Business Studies*, *37*, 285-320.

Gibson, C. B., & Zellmer-Bruhn, M. E. (2002). Minding your metaphors: Applying concept of teamwork metaphors to the management of teams in multicultural contexts. *Organizational Dynamics, 31*(2), 101-116.

Graham, J., & Lam, N. M. (2003). The Chinese negotiation. *Harvard Business Review*, *81*(10), 82-91.

Gregersen, H. B., & Black, J. S. (1995). Keeping high performers after international assignments: A key to global executive development. *Journal of International Management*, *1*, 3-31.

Gooderham, P., & Nordhaug, O., (2003). *International management: Cross-boundary challenge*. Hoboken, NJ: Wiley-Blackwell.

Gupta, A., & Govindarajan, V. (2001). Converting global presence into global competitive advantage. *Academy of Management Executive*, *15*(2), 45-55.

Guzzo, R. A. (1996). The expatriate employee. *Trends in Organizational Behavior, 3*, 123-138.

Hackman, J. R., & Oldham, G. R. (1980). Development of the job diagnostic survey. *Journal of Applied Psychology, 60*, 159-170.

Hackman, M. Z., & Johnson, C. E. (2004). Traits, situational, and functional leadership. In M. Z. Hackman, & C. E. Johnson (Eds.), *Leadership: A communication perspective, 4ᵗʰ edition*, (pp. 63-86). Long Grove, IL: Waveland Press.

Hall, D. T. (1976). *Careers in organizations*. Pacific Palisades, CA: Goodyear Publishing.

Hall, E. T. (1977). *Beyond culture*. Garden City, NY: Anchor Press/Doubleday.

Hall, D. T., & Chandler, D. (2004). Psychological success: When the career is a calling. *Journal of Organizational Behavior*, *26*(2), 155-176.

Harris, J. E. (1989). Moving managers internationally: The care and feeding of expatriates. *Human Resource Planning, 12*, 49-53.

Harvey, M. G. (1989). Repatriation of corporate executives: An empirical study. *Journal of International Business Studies, 20*, 131-144.

Harvey, M. (1997). Dual-career expatriates: Expectations, adjustments, and satisfaction with international relocation. *Journal of International Business*, *28*(3), 637-669.

Harvey, M., & Wiese, D. (1998). Global dual-career mentoring: A phase model approach. *Human Resource Planning*, *21*(2), 33-48.

Harvey, M., Buckley, M., Novicevic, M., & Wiese, D. (1999). Mentoring dual-career expatriates: A sense-making and sense-giving social support process. *International Journal of Human Resource Management*, *19*(5), 808-827.

Headland, T. N., Pike, K. L., & Harris, M. (Eds.). (1990). Emics and etics: The insider/outsider debate. *Frontiers of Anthropology*, *7*. Newbury Park, CA: Sage.

Hofstede, G. (1980). *Cultures consequences: International differences in work related values*. Beverly Hills, CA: Sage.

Hofstede, G., & Bond, M. (1988). The Confucius connection: From cultural roots to economic growth. *Organizational Dynamics*, *16*(4), 5-21.

Hofstede, G. (1999). Problems remain, but theories will change. *Organizational Dynamics, 28*, 34-44.

Hofstede, G. (2005). *Cultures and organizations: Software of the mind, 2nd ed*. New York, NY: McGraw-Hill.

Hofstede, G. (2008). *Cultural dimensions*. Retrieved from http:geerte-hofstedeinternational.html

Holtbrugge, D., & Schillo, K. (2008). Intercultural training requirements for virtual assignments: Results of an explorative empirical study. *Human Resource Development International, 11*(3), 271-228.

House, R., & Aditya, R. (1997). The social scientific study of leadership: Quo vadis? *Journal of Management*, *23*(3), 409-465.

House, R., Javidan, M., Hanges, P., & Dorfman, P. (2002). Understanding cultures and implicit leadership theories across the globe: An introduction to project GLOBE. *Journal of World Business*, *37*(1), 3-10.

House, R. J., Hanges, P. J., Javidan, M., Dorfman, P. W., & Gupta, V. (2004). *Culture, leadership, and organizations: The GLOBE study of 62 societies*. Thousand Oaks, California: Sage.

Husserl, E. (1970). *The Crisis of European Sciences and Transcendental Phenomenology*. Evanston, IL.: Northwestern University Press. (Original work published 1936).

Jassawalla, A. R., Asgary, N., & Sashittal, H. C. (2006). Managing expatriate: The role of mentors. *International Journal of Commerce and Management*, *16*(2), 130-140.

Javidan, M., & House, R. J. (2001). Cultural acumen for the global manager: Lessons from project GLOBE. *Organizational Dynamics, 29,* 289-305.

Javidan, M., Dorman, P. W., Sully de Luque, M., & House, R. J. (2006). In the eye of the beholder: Cross cultural lessons in leadership from project GLOBE. *The Academy of Management Perspectives*, *20*(1), 67-90.

Javidan, M., Stahl, G. K., Brodbeck, F. & Wilderom, C. P. M. (2005). Cross-border transfer of knowledge: Cultural lessons from project GLOBE. *The Academy of Management Executive*, *19*(2), 59-76.

Johnson, E. C, Kristoff-Brown, A. I., Van Vianen, A. E. M, & De Pater, I. E. (2003). Expatriate social ties: Personality antecedents and consequences for adjustment. *Journal of International Selection and Assessment, 11*(4), 277-288.

Jung, D. I., Bass, B. M., & Sosik, J. J. (1995). Bridging leadership and culture: A theoretical consideration of transformational leadership and collectivistic cultures. *The Journal of Leadership Studies*, *2*(4), 3-18.

Kamoche, K. (2000). Developing managers: The functional, the symbolic, the sacred, and the profane. Organization Studies, *21*(4), 747-774.

Kanter, R. M. (1995). *World class: Thriving locally in the global economy*. New York, NY: Simon & Schuster.

Kluckhohn, F. R., & Strodtbeck, F. L. (1961). *Variations in value orientations*. Westport, CT: Greenwood Press.

Kowske, B. J., & Anthony, K. (2007). Towards defining leadership competence around the world: What mid-level managers need to know in twelve countries. *Human Resource Development International, 10*(1), 21-41.

Kram, K. E. (1985). *Mentoring at work: Developmental relationships in organizational life*. Glenview, IL: Scott Foresman.

Kvale, S. (2008). *Doing Interviews*. Los Angeles, CA: Sage.

Lincoln, Y. S., & Guba, E. G. (1990). Judging the quality of case study reports. *Journal of Qualitative Studies in Education*, *3*(1), 53-59.

Marton, F. (1981). Phenomenography: Describing conceptions of the world around us. *Instructional Science*, *10*(1981), 177-200.

Marton, F., & Pong, W. Y. (2005). On the unit of description in phenomenography. *Higher Education Research and Development*, *24*(4), 335-346.

Marquardt, M. J. (1999). *The global advantage: How world-class organizations improve performance through globalization.* Houston, TX: Golf Publishing.

Mendenhall, M., & Oddou, G. (1985). The dimensions of expatriate acculturation: A review. *Academy of Management Review*, *10*, 39-47.

Mendenhall, M. E. (2006). The elusive, yet critical challenge of developing global leaders. *European Management Journal*, *24*(6), 422-429.

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, *36*(5), 519-538.

Merleau-Ponty M (1962) Phenomenology of Perception (C. Smith, Trans.). London:

Routledge & Kegan Paul. (Original work published 1945).

Morse, J. M. (Ed.). (1994). *Critical issues in qualitative research methods*. Thousand

Oaks, CA: Sage.

Noe, R. (1988). An investigation of the determinants of successful assigned mentoring

relationships. *Personnel Psychology*, *41*, 457-479.

Northouse, P. G. (2007). Culture and leadership. In P. G. Northouse (Ed.), *Leadership:*

Theory and practice, 4th edition (pp.301-340). Thousand Oaks, CA: Sage.

Oddou, G. (2002). Managing your expatriates: What the successful firms do. *Human*

Resource Planning, *14*(4), 301-308.

Osland, J.S. (1995). *The adventure of working abroad: hero tales from the global*

Frontier. San Francisco, CA: Jossey-Bass.

Osman-Gani, A. M., & Zidan, S. S. (2001). Cross-cultural implication of planned on-the-

job training. *Advances in Developing Human Resources*, *3*(4), 452-461.

Paige, R. M. (1993). On the nature of intercultural education and intercultural

experiences. In R. M. Paige (Ed.), *Education for the intercultural experience*.

Yarmouth, ME: Intercultural Press.

Panaccio, A., & Waxin, M. (2005). Cross-cultural training to facilitate expatriate

adjustment. *Personnel Review, 34*(1), 51-67.

Patton, M. Q. (2002). *Qualitative research and evaluation methods*, *3rd ed*. Thousand

    Oaks, CA: Sage.

Peden-McAlpine, C. (2000). Early recognition of patient problems: A hermeneutic

    journey into understanding expert thinking in nursing. *Scholarly Inquiry for*

    Nursing Practice: An International Journal, *14*(3), 191-222.

Pekerti, A. A. & Thomas, D. C. (2003). Communication in intercultural interaction: An

    empirical investigation of idiocentric and sociocentric communication styles.

    Journal of Cross-Cultural Psychology, 34(2), 139-154.

Peterson, D. B. (2002). Management development: Coaching and mentoring programs. In

    K. Kraiger (Ed.), *Creating, implementing, and managing effective training and*

    development: State-of-the-art lessons for practice (pp. 160-191). San Francisco,

    CA: Jossey-Bass.

Phillips, J. M. & Gully, S. M. (1997). Role of goal orientation, ability, need for

    achievement, and locus of control in the self-efficacy and goal-setting process.

    Journal of Applied Psychology, *82*(5), 792-802.

Polkinghorne, D. E. (1988). *Narrative knowing and the human science*. Albany, NY:

    State University of New York Press.

Ragins, B. R., & Sundstrom, E. (1989). Gender and power in organizations: A

    longitudinal perspective. *Psychological Bulletin, 105*, 51-88.

Ragins, B. R., & Cotton, J. L. (1991). Easier said than done: Gender differences in

    perceived barriers to gaining a mentor. *Academy of Management Journal, 34*,

    939-951.

Ragins, B. R., & Scandura, T. A. (1993). Expected costs and benefits of being a mentor. Paper presented at the meeting of the Society for Industrial-Organizational Psychology, San Francisco, CA.

Ragins, B. R., & Cotton, J. L. (1993). Gender and willingness to mentor in organizations. *Journal of Management*, *19*, 97-111.

Ragins, B. R., & Scandura, T. A. (1994a). Gender differences in expected outcomes of mentoring relationships. *Academy of Management Journal*, *37*(4), 957-971.

Ragins, B. R., & Scandura, T. A. (1994b). Gender and the termination of mentoring relationships. *Academy of Management Best Paper Proceedings*, 361-365.

Ragins, B., & Scandura, T. (1999). Burden or blessing? Expected costs and benefits of being a mentor. *Journal of Organizational Behavior*, *20*(4), 493-510.

Ragins, B. R., Cotton, J. L., & Miller, J. S. (2000). Marginal mentoring: The effects of type mentor, quality of relationship, and program design on work and career attitudes. *Academy of Management Journal, 43*(6), 1177-1194.

Ramamoorthy, N., & Carroll, S. J. (1998). Individualism/collectivism and reactions toward alternative HRM practices. *Human Relations*, *51*(5), 571-588.

Ricoeur, P., & Thompson, J. B. (1981). *Hermeneutics and the human sciences: Essays on language, action, and interpretation.* Cambridge (ENG.): Cambridge University Press.

Robie, C., & Ryan, A. (1996). Structural equivalence of a measure of cross-cultural adjustment. *Educational and Psychological Measurement*, *56*, 514-521.

Robie, C., Johnson, K., Nilsen, D., & Hazucha, J. F. (2001). The right stuff:

Understanding cultural differences in leadership performance. *The Journal of Leadership Development*, *20*(7&8), 639-649.

Ronen, S. (1989). Training the international assignee. In I. L. Goldstein & Associates (Eds.), *Training and development in organizations* (pp.417-453). San Francisco, CA: Jossey-Bass.

Sackmann, S. A., & Phillips, M. E. (2004). Contextual influences on culture research: Shifting assumptions for new workplace realities. *International Journal for Cross-cultural Management*, *4*(3), 370-390.

Sanchez, J. I., Spector, P. E., & Cooper, C. L. (2000). Adapting to a boundaryless world: A developmental expatriate model. *The Academy of Management Executive*, *14*(2), 96-106.

Scandura, T. A. (1992). Mentorship and career mobility: An empirical investigation. *Journal of Organizational Behavior*, *13*, 169-174.

Scandura, T. A., & Von Glinow, M. A. (1997). Development of the international manager: The role of mentoring. *Business and the Contemporary World*, (1), 95-115.

Schein, E. H. (1971). The individual, the organization, and the career: A conceptual scheme. *Journal of Applied Behavioral Science, 1,* 401-426.

Shaffer, M. A., Harrison, D. A., & Gilley, K. M. (1999). Dimensions, determinants, and differences in the expatriate adjustment process. *Journal of International Business Studies*, *30*(3), 557-583.

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*, *91*(1), 109-125.

Shay, J., & Baack, S. (2004). Expatriate assignment, adjustment and effectiveness: An empirical examination of the big picture. *Journal of International Business Studies*, *35*(3), 216-232.

Svesson, L. (1989). The conceptualization of cases of physical motion. *European Journal of Psychology of Education*, *4*(4), 529-545.

Ting-Toomey, S., & Chung, L. C. (2005). What are the essential cultural value patterns? In S. Ting-Toomey & L. C. Chung (Eds.), *Understanding intercultural communication*, (pp. 51-82). London: Oxford University Press.

Thomas, D.C., & Ravlin, E.C. (1995). Responses of employees to cultural adaptation by a foreign manager. *Journal of Applied Psychology, 80*(1), 133-146.

Thomas, D. A. (2002). *The essentials of international management*. Thousand Oaks, CA: Sage.

Thomas, D. C., & Inkson, K. (2003). *Cultural intelligence: People skills for global business.* San Francisco, CA: Berrett-Koehler.

Thomas, D. C. (2006). Domain and development of cultural intelligence: The importance of mindfulness. *Group Organization Management*, *31*(1), 78-99

Triandis, H. C. (1989). The self and social behavior in differing cultural contexts. *Psychological Review*, *96*(3), 506-520.

Triandis, H. C. (1995). *Individualism and collectivism*. Boulder, CO: Westview Press.

Triandis, H. C. (2004). The many dimensions of culture: Academic commentary. *Academy of Management Executive*, *18*(1), 88-93.

Trompenaars, F., & Hampden-Turner, C. (1998). *Riding the waves of culture*. New York, NY: McGraw-Hill.

Tung, R. L. (1981). Selection and training of personnel for overseas assignments. *Columbia Journal of World Business*, *16*(1), 68-79.

Tung, R. L. (1987). Expatriate assignments: Enhancing success, minimizing failure. *Academy of Management Executive*, *1*(2), 117-126.

Tung, R. L. (1988). *The New Expatriates: Managing Human Resources Abroad.* Cambridge, MA: Ballinger.

Tung, R. L. (1998). A contingency framework of selection and training of expatriates revisited. *Human Resource Management Review*, *8*(1), 23-38.

Van Maanen, J., & Schein. E.H. (1979). Toward a theory of organizational socialization. In B.M. Staw (Ed.), *Research in Organizational Behavior: Vol. L* (pp. 209-264). Greenwich, CT: JAI Press.

van Manen, M. (1997). *Researching lived experience: Human science for an action sensitive pedagogy.* London, ONT, Canada: The Althouse Press.

Vodosek, M. (2005). Cultural diversity, intragroup conflict, and group outcomes: Evidence for a mediated relationship. *Academy of Management Best Conference Paper, CM*, D1-D6.

Von Glinow, M. A., Drost, E., & Teagarden, M. B. (2002). Converging on IHRM best practices: Lessons learned from a globally distributed consortium on theory and practice. *Human Resource Management*, *41*(1), 123-140.

Vroom, V. (1976). *Motivation and work*. New York, NY: Prentice-Hall.

Wertz, F J (2005) Phenomenological research methods for counseling psychology, *Journal of Counseling Psychology*, *52*(2), 167-177.

Windham International, National Foreign Trade Council, & Society for Human Resource Management. (1999). *Global Relocation Trends 1999 Survey Report*. New York, NY: Windham International.

Wolcott, H. F. (2009). *Ethnography: A way of seeing*. Walnut Creek, CA: Altamira Press.

Woodall, J. (2003). Convergence and diversity in HRD. *Human Resource Development International, 8*(1), 1-4.

Yavas, U., & Bodur, M. (1999). Correlates of adjustment: A study of expatriate managers in an emerging country. *Management Decision*, *37*(3), 267-278.

Zimmermann, A., & Sparrow, P. (2007). Mutual adjustment processes in international teams. *International Studies of Management*, *37*(3), 65-88.

Appendix A

Email Notice of Qualitative Research on Expatriate Cultural Adaptation 2009-10

This email will be sent by the Global Mobility department of two US companies with transnational operations to the list of employees determined to be potential participants based on the criteria for inclusion and exclusion of the study. The email list will be sorted as indicated in the criteria listed in the IRB form submitted by Diana Cooper, College of Education, department of Work and Human Resource Education, May 2009. The procedure is similar to a pilot study conducted under course IRB approval for NURS8171 Qualitative Research Methods, spring 2008.

Subject line: Culture and Business research at University of Minnesota– Expatriates invited to share your experience

Text of email invitation:

Dear [personalized name from list, if possible],

[Company X] has received a request for participants to engage in a University of Minnesota dissertation research study on international assignees and their experiences in adapting to a new culture. You have been sent this email because you fit the criteria for the study.

The details of the research project are described in the attached document. Basically, participants will interview with the researcher for 1 – 1.5 hours, in person or via phone, sharing about your experience with cultural differences as an expatriate. Please contact Diana Cooper, the doctoral researcher, directly for further questions or to volunteer to participate: coopsite@juno.com or coope048@umn.edu

[Company X] supports graduate research at the University of Minnesota, however, this email in no way represents a requirement for you to participate.

Best regards,

Global Mobility Team

Appendix B

University of Minnesota Research Proposal
Department of Organizational Leadership, Policy and Development
Coope048@umn.edu and coopsite@juno.com

May 2010

To: International Assignees (and returned expats)

From: Diana Cooper
       Doctoral Candidate, University of Minnesota
       A.B. Stanford University

Re: Expatriate Culture Research – Short Interviews

I am a Ph.D. student at the University of Minnesota in Organization Development seeking volunteers to interview about their experience on an international assignment. Participation would involve an interview of about 45 minutes to 1. 5 hours in length and possibly a follow-up interview. The content of our discussions would focus on your description of a couple of cross-cultural "incidents" followed by a discussion of how you learned the norms and customs of another culture while on an international work assignment. Participants may be interviewed by phone, Webex or Skype if they are not residing in the vicinity of the researcher (Minneapolis, MN).

I am seeking participants who have been working in another culture a minimum of 6 months to maximum 5 years in length. Interview questions will be open-ended, since the research method is intended to capture your views and insights from your experience. Findings from the study will be included in my dissertation and possibly presented for publication at an academic conference.

Participation Parameters
Participants in the interviews may be U.S. and non-U.S. citizens assigned to an international project for a transnational company for duration of *at least six months*. Participants *may be currently on* an expatriate assignment or returned within the past three years. Participants will have engaged in no more than three expatriate assignments in their career.

Research Time Frame: Spring 2010 (please respond by May 15)
Please contact me via email if you would like to participate: coopsite@juno.com or coope048@umn.edu Interviews will be scheduled at the convenience of participants.

Compensation

Participants may receive a light meal or refreshment during in-person interview sessions and small token of appreciation at the completion of the project. Participants will not receive compensation.

Confidentiality
The research report will not name individuals. The final analysis of interviews with expatriates will be presented in the form of a dissertation to University of Minnesota faculty. The University of Minnesota Internal Review Board for Graduate School Research has approved this project and will ensure any sharing of my research report in academic publications or conferences will be done in such a way to maintain participant anonymity. The name of employers will not be identified.

If you have questions, please contact the researcher or her faculty advisor
Doctoral advisor to Diana Cooper: Professor Rosemarie Park, parkx002@umn.edu

I hope to hear from you soon **to set an interview date.** I look forward to learning about your expatriate experience!

Appendix C

---------- Forwarded message ----------
Date: Tue, 9 Jun 2009 16:19:43 -0500 (CDT)
From: irb@umn.edu
To: coope048@umn.edu
Subject: 0905E66947 - PI Cooper - IRB - Exempt Study Notification

TO : coope048@umn.edu,

The IRB: Human Subjects Committee determined that the referenced study is exempt from
review under federal guidelines 45 CFR Part 46.101(b) category #2 SURVEYS/INTERVIEWS;
STANDARDIZED EDUCATIONAL TESTS; OBSERVATION OF PUBLIC BEHAVIOR.

Study Number: 0905E66947
Principal Investigator: Diana Cooper

Title(s):   Expatriate worker experiences with mentors during the cultural adaptation process:
A phenomenography
_____

This e-mail confirmation is your official University of Minnesota RSPP notification of
exemption from full committee review. You will not receive a hard copy or letter.
This secure electronic notification between password protected authentications has been
deemed by the University of Minnesota to constitute a legal signature.

The study number above is assigned to your research. That number and the title of your
study must be used in all communication with the IRB office.

Research that involves observation can be approved under this category without obtaining consent.

SURVEY OR INTERVIEW RESEARCH APPROVED AS EXEMPT UNDER THIS CATEGORY
IS LIMITED TO ADULT SUBJECTS.

This exemption is valid for five years from the date of this correspondence and will be
filed inactive at that time. You will receive a notification prior to inactivation. If
this research will extend beyond five years, you must submit a new application to the IRB
before the study?s expiration date.

Upon receipt of this email, you may begin your research. If you have questions, please
call the IRB office at (612) 626-5654.
You may go to the View Completed section of eResearch Central at http://eresearch.umn.edu/
 to view further details on your study.
The IRB wishes you success with this research.

Appendix D

Sample Interview Questions with Expatriate Workers – Mentoring Study

Purpose of Question in the Context of the Study	Interview question (s)

Demographic and professional information sought to:
 a) develop rapport between researcher and the participant;
 b) establish the level of prior experience;
 c) understand the current assignment of the expatriate worker
	1. Where are you from/what is your country of citizenship?
	 2. Have you spent extensive time living in another country?
	 3. How long is your assignment here in the U.S. or, how long was your assignment in another country (if U.S. citizen)?
	 4. How long have you been at company X? (as an employee)
	 5. What is your title?
	 6. What is your professional role?
	 7. How many people are in the work group/department you interact with on expatriate assignment?
	 8. What percentage of these colleagues are not from the host country? How many countries represented in this group?
	 9. Did you work/meet with these co-workers/managers prior to your expat assignment?
	 10. How were you selected for this role?
	 11. Was there an assessment for your ability to work in another culture separate from the selection process for your current job?
	 12. How confident were you in your language skills in the host country when you arrived for your assignment?
	 13. Have you been on an expatriate assignment in the past? Where and for how long? How did it go?
	 14. What kind of orientation or training was provided about living in another culture?
	   a. work (e.g. norms for meetings, formality with managers, dress code, job responsibilities, performance reviews, etc.)
	   b. social (e.g. etiquette, traditional holidays, customs)
	   c. non-work (e.g. instructions on getting a Driver's license, phone, household supplies, enrolling children in school, finding and receiving medical services)

Cultural Adaptation and motivations	1. What are the most rewarding things about being an expat?
	2. What has been the biggest challenge on your expatriate assignment?
	3. How would you describe the *corporate culture* of company X in your home country vs. your host country? Similar? Different?
	4. Describe an experience on your assignment that highlighted cultural differences, an occasion when you knew the normal way of doing things at home was not the same in the host country? What do you do when this happens? How do you feel?
	5. You were asked to write an email about two or three "cultural incidents" that presented/exposed cultural differences between your host country and your culture in a way that you did not understand or may have caused some anxiety.
	  a. Please choose one incident and describe, in detail, how it happened?
	  b. What did you do when this incident occurred? If you don't understand, what do you do?
	  c. How do you know "what you don't know" about another culture?
	  d. How did you come to understand this incident?
	  e. Have you 1) resolved this incident in 2) a way that makes you feel comfortable and that 3) you understand it now?
	Repeat question 4 for another incident.

Informal Mentoring Relationships	1. Who has assisted you in accomplishing daily goals/finding useful information during your assignment? 2. Describe what made this person/people helpful to you? 3. What would have been helpful on this assignment (that no one told/provided to you)? 4. What company services were helpful in the transition?
Explicit Mentoring Relationships	1. Were you assigned a formal mentor? How did that work? 2. Do you perceive any of your colleagues as informal mentors in adjusting to the culture of your host country? 3. If so, what is their role/what has it been? 4. What kinds of things have you learned from them? 5. What is the role of your supervisor/boss in helping you adapt to a new culture?

Conclusion, Summary	1. Was the expat experience what you expected?
	2. Would you do it again?
	3. What could your company do to improve the expat experience? Strategically? Practical procedures/process? Corporate culture?