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USE OF TECHNOLOGIES FOR AMERICAN EXPATRIATE TRAINING

A Research Project
Presented to the Faculty of
The George L. Graziadio
School of Business and Management
Pepperdine University

In Partial Fulfillment
of the Requirements for the Degree
Master of Science
in
Organization Development

by
Christine S. Cruz
August 2013

This research project, completed by

CHRISTINE S. CRUZ

under the guidance of the Faculty Committee and approved by its members, has been submitted to and accepted by the faculty of The George L. Graziadio School of Business and Management in partial fulfillment of the requirements for the degree of

MASTER OF SCIENCE
IN ORGANIZATION DEVELOPMENT

Date: August 2013

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Abstract

This study examined the use of technology-based training and development within expatriate populations after the 2008 global recession. A quantitative survey design was used to collect data. The study results were shared with a live, face-to-face group forum of training and development practitioners. A total of 46 participants answered the survey. Findings related to participant demographic data as well as their perceptions regarding the impacts of the 2008 recession, training timing and topics, and training methods were reported. The study findings indicated that the 2008 global recession did not have a strong impact on these participants. They also tended to receive training after they arrived onsite. Technology-based training was not viewed as highly effective by expatriates. Rather, it is traditional instructor-led classroom training that best prepared American expatriates for their work assignment abroad, second to blended learning of classroom and technology training.

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Chapter 1

Introduction

Companies and organizations have relied on expatriates for decades as a means to share knowledge and apply talent flexibly as needed throughout their operations domestically and abroad. However, researchers agree that American expatriates do not assimilate as well as their European or Asian expatriate counterparts who are developed extensively through language, cross-cultural, economic, political, and historical training (Ghafoor, Khan, Idrees, Javed, & Ahmed, 2011). Moreover, training and development methodologies for American expatriates have been consistent since the 1990s and largely have failed to incorporate new training and development techniques that have emerged in recent years.

In particular, social media and Web 2.0 technologies offer ample possibilities to enhance, streamline, and improve training and development of American expatriates living abroad. However, the use of these tools has not been widely researched as it pertains to expatriate training. This is a notable gap, as the 2008 global recession intensified organizations need to deliver training quickly, effectively, and cost-efficiently (Sharma, 2011).

For example, in other areas of business, many companies downsized and opted to save costs by significantly cutting back on travel and in-person meetings. As a result, virtual communication methods, eLearning, Social Media, and Social Networking replaced traditional face-to-face meetings and trainings and have now become a common resource for global and international companies to implement in order to increase productivity, and streamline employee engagement and career development (Sharma,

2011). This study examined expatriate training to identify the use of technology-based training compared to other, more traditional forms.

Purpose of the Study

This study examined the use of technology-based training and development within expatriate populations after the 2008 global recession. Three research questions were explored:

1. In what ways did the 2008 global recession affect expatriate training and development?
2. What training is delivered to expatriates and when is it delivered after 2008?
3. What methods of training delivery are used with expatriates after 2008?

Significance of the Study

Some researchers suggest that effective training and development creates a global learning environment and organization that establishes expatriates up for long-term success in their host country (Sharma, 2011). However, the majority of these findings were reported prior to the 2008 recession when employees stayed at one job or company because there was more job security. More study is needed to understand how the 2008 global recession shifted European and Asian expatriate longevity trends, and how that impacted training and development globally.

Thus, although extensive research has been conducted on American expatriates living overseas, little research has been conducted about the effects of technology training and eLearning on expatriates after the 2008 global recession (Ghafoor et al., 2011; Sharma, 2011). The present research generated valuable insights about training delivery for expatriates during the present, challenging economic environment.

Organization of the Study

This chapter provided the study background, purpose, and setting. The next chapter provides a review of literature relevant to the present study. Chapter 3 describes the methods used in this study, including the research design, sampling, measurement, and data analysis procedures. Chapter 4 describes the participant demographics and reports the results of the study. Chapter 5 provides a discussion of the results.

Chapter 2

Literature Review

This chapter provides a review of literature relevant to the present study, including the timing and content of expatriate training and methods of delivery of this training. A synthesis of the literature also is provided.

However, before proceeding to the literature review, it is necessary to define *expatriate*, the term central to this research. Expatriate is defined in various ways in the literature. For example, Adler (1997) defined an expatriate as “an employee who has been sent to a foreign country in a professional or managerial capacity” (p. xx). This meaning describes an American manager or employee who was sent overseas by their corporation or company to manage a team or lead international efforts away from home. Mendenhall and Wiley (1994) gave the term a less professional but more permanent connotation, defining it as “someone who leaves the country of one’s birth or official residence and travels to another country to take up residence there” (p. 2). This definition could imply a range of expatriates such as government workers, educators, doctors, missionaries, entrepreneurs, or foreign students. In this thesis, *American expatriate* is defined as a U.S. citizen who is employed by a company and transferred overseas for a foreign work assignment or assignments that last longer than 2 years in total.

Timing and Content of Expatriate Training

Wang and Tran (2012) asserted that pre-departure and post-arrival training are strongly linked to expatriates’ job performance. Pre-departure training typically is delivered as traditional classroom training. This may be available at cross-cultural integration schools and programs. Through training in subjects such as language, cross-cultural norms, business etiquette, history, economy, and politics, the expatriate receives

a preview of what they will experience in the assignment country. In the 1970s and 1980s, expatriate training and development for Americans was held traditionally which entailed classroom and active engagement through listening. Although expatriates were learning in the classroom, they were not able to apply the knowledge learned traditionally for practical applications such as cross-cultural, intercultural, and language competencies. Research show how American expatriates did not successfully complete their overseas assignments compared to their European and Asian expatriate counterparts due to poor traditional training methods (Minter, 2008).

Post-departure training typically involves experiential learning and simulation activities on-site in groups. This training is interactive by design (Ghafoor et al., 2011). Ghafoor et al. argued that post-arrival training was more effective than pre-departure training and guaranteed stronger job performance for the American expatriate. From the late 1980s to 1990s, American training and development shifted toward an experiential model learning that involved active engagement, and interaction with other instructors and students. The 1990s were also a time when learning and development technologies were introduced such as the Internet, CD-ROMs, and intercultural simulations (Mervosh & McClenahan, 1997).

Some companies make additional investments in their expatriates by repatriation training after they return to their home countries after spending time abroad. This is done because expatriates and their families often experience reverse culture-shock when they move back to their home country and get readjusted to the life they had before they lived abroad. Dunbar and Katcher (1990) pointed out that up to 40% of American expatriates leave their companies upon their return back to the United States, speculating that the reason for turnover was due to poor repatriation.

According to Tung (1987), European and Asian expatriates adjust far more successfully in their host countries compared to American expatriates—largely due to the extensive content they cover during training. European and Asian expatriates go through extensive language, cross-cultural integration, history lessons, and learn about a host country's economy and politics. Tung suggests that to enhance expatriate success and minimize failure, American expatriates need to adapt long-term orientation with regard to expatriate assignments and provide better support at headquarters, develop a more global orientation to the curriculum, and provide more rigorous training programs to prepare expatriates for cross-cultural encounters.

Farh and Bartol (2010) similarly address that American expatriates need to have solid host country knowledge, learn sufficient language skills, and cultural norms to adapt and be integrated. Simonin and Ozsomer (2009) researched European firms operating in Japan, and examine how HR management practices, particularly around expatriation and corporate training enhances an organization's human capital and boosts employee performance. A significant positive correlation between training and the performance of European managerial and non-managerial employees was shown.

Family and spouse training. Several researchers stressed the importance of family and spouse training to help them adjust to the new host culture (Dunbar & Katcher, 1990; Mendenhall & Stahl, 2000; Mervosh & McClenahen, 1997; Tung, 1987). Mendenhall and Stahl asserted that every family member needs to be involved in helping the expatriate bridge cultures. Ghafoor et al. (2011) similarly concluded based on their research that

spouse and family training is equally important to expatriate training and they must be included in every pre-departure and post-departure training. Their failure

is the expatriate's failure. Also, the spouse should be given proper assistance in resuming her career in the host country. (p. 344)

Although these authors stress the importance of family training and coaching for expatriates, it is important to note that the majority of research conducted in the 1980s, 1990s, and 2000s focused on male, married expatriates who brought their spouse and children with them on assignment. A glaring omission in the literature is discussion of single expatriates or female expatriates with families. Exploring what factors are important in their preparation and training remains a direction for continued research.

Mentorship. Two methods of mentorship were discussed in the literature. One type is home-country mentorship, which is managed remotely by trainers back home. The other type is host-country mentorship, wherein a fellow expatriate or a mentor from the host country directs and trains the new expatriate.

Most of the research and literature emphasized how important it is for an expatriate to be mentored on site by another expatriate or appropriate host-country colleague, rather than remotely by a mentor in the home country (Dunbar & Edward, 1990). Carraher, Sullivan, and Crocitto (2008) studied 299 expatriates in 19 countries. The expatriates with host-country mentors were compared against those with home-country mentors and were found to have superior organizational knowledge, performance, and career advancement. Ghafoor et al. (2011) emphasized that host-country mentorship is important and that host country mentors should be involved in expatriate training.

Career development. Dunbar and Edward (1990) concluded that in addition to language and cross-cultural training, effective career management was vital for expatriates. Mervosh and McClenahan's (1997) research emphasized how important it

was to integrate career planning programs in global assignments and manage the expatriate's career expectations so there are no surprises. When a manager or expatriate felt "out of sight, out of mind," it created a population of insecure and uninformed expatriates who felt stuck or did not see a path to promotion. As a result, 40% of expatriates left their companies after being repatriated for better opportunities that had clearer career paths.

Methods of Delivery

Virtualization is defined as a communication method that allows employees to interact and interface without meeting face to face (Grenny & Han, 2008; Katzman, 2008). Many virtualization technologies are available, including webinars; web conferencing utilizing video cameras; and social media resources such as Yammer, Facebook, YouTube, Twitter, Blogging, and company intranets. These social media resources allow employees to interface, communicate, engage, and create online communicates without interacting in person. Social media allows employees to connect with their colleagues and contributes an important role of helping and aiding the growth of organizations on a global scale.

Virtualization is an important resource for companies that value employee engagement, career development, and training. Social media has also become a vital resource and important tool for career development that companies can implement and streamline their training programs in their organizations (Grenny & Han, 2008; Katzman, 2008).

These tools are being integrated into companies for multiple reasons. First, they help bridge the communication gap between employees of multi-generation gaps who work in different parts of the country and the world. Second, they increase employee

interaction and personalizing communication. Third, they save an organization money, time, and increasing revenue by virtualizing career development and training programs (Grenny & Han, 2008; Katzman, 2008).

After 2005, American training and development departments and companies began utilizing virtualizing technologies that involved social media, social networking, and Web 2.0. According to Bingham (2009) American Society of Training and Development (ASTD) and other human resources leaders agree that Web 2.0 and social media need to be incorporated in training. In 2011, 37% of companies increased their budget and spending on training technologies, intranets, and social media to stay industry competitive (“Communicators Plan Investment,” 2011).

The general consensus from the literature was that social media is positive for training and development of expatriates. Social media builds communities, engages learners, and allows instructors and trainers to provide learners multiple learning resources even after training hours (Katzman, 2008). Training and development leaders recognize social networking and social media as having the capability of being used as a powerful form of influence for learners (Grenny & Han, 2011).

However, there is limited research and results because social media and social networking is a new technology incorporated in training that launched in the mid to late 2000s. Much of the research is still new, and there is not an ample amount of research conducted about the effects of social networking in training.

Thus, an area for continued research is to examine how training and development using technology and social media can still have the same effect that experiential and face-to-face training will have on job performance and promotion ability. Do social networking, virtual training, and trainings conducted via technologies decrease the

effectiveness of live instructor-led training? Will expatriates be less prepared for cross-cultural and intercultural integration because social media and virtual training did not allow for them to interact in person with a trainer or other classmates? This would be an area for future research in this thesis.

Summary of the Literature

Several similarities, differences, challenges, limitations, trends are evident in the studies reviewed in this chapter. Social media and Web 2.0 are generally viewed positively as the next step of training and development. ASTD and human resources leaders agree that Web 2.0 and social media is necessary in training and development (Bingham, 2009). So much so that in 2011, 37% of companies increased their budget and spending on training, corporate intranets, and social media to stay market competitive (“Communicators Plan Investment,” 2011). Social media is viewed as positive for training because it builds communities, engages learners, and allows instructors to share multiple resources with learners even after training hours (Katzman, 2008). Most importantly, training leaders and companies recognize that social media can be used as a powerful form of learning influence (Grenny & Han, 2011).

The literature reviewed has a consensus that these are important points and steps in training and developing American expatriates when they move overseas for an international assignment. These include language training; cross-cultural integration; family and spouse training; host-country mentorship vs. home-country mentorship; post-arrival training vs. pre-arrival training; experiential and group learning vs. traditional, classroom-based training; and repatriation after the expatriate returns back home.

Without these steps being properly implemented in training and development, American expatriates had the tendency to leave their company or return to their home

countries before the planned end of the assignment (Grenny & Han, 2011). These Americans were considered a non-success compared to the expatriates who assimilated effectively and were able to sustain their overseas assignment. The authors discussed in this chapter agreed that American expatriates did not assimilate as well as their European or Asian counterparts because of these deficiencies in training.

In reviewing the literature for this thesis, there were specific points and study results that differed or were noteworthy. Whereas the majority of studies emphasized how important it is to have specific steps and topics integrated in training, Derven (2009) analyzed social media training and encouraged a trial and error approach to experiential learning. Without a set plan or step processes to train American expatriates for their overseas assignment, a trial and error approach may seem risky and ineffective, although Derven stated otherwise.

While most of the literature emphasized how it is important to provide host-country, post-departure training for expatriates, Minter's (2008) conclusion was that expatriates needed a lengthy traditional, classroom based pre-departure training. Minter's views contradict other studies that have concluded that pre-departure training is ineffective compared to post-departure training and host-country mentorship.

Minter (2008) continued to emphasize other key differences in studies. According to Minter, the number of single expatriate women is increasing, and many companies and firms do not provide international training and cultural orientation to set women up for success. This is because the majority of studies tend to be oriented toward the male expatriate, moving overseas for an international assignment with his spouse and family. Focusing on the single, female expatriate is an area of opportunity for future research to

see how companies can bridge the gap between training and development programs for the single professional female expatriate.

Minter (2008) was the only researcher to conclude that since the 1990s there have been little to no improvements in training and developing expatriates. After reviewing a number of literatures for this thesis that kept reemphasizing and pointing out all the same training steps and conclusions, there is an area of opportunity to explore new improvements in training and developing expatriates.

Gaps in the Literature

There are many gaps and areas of opportunity to further the research in this literature review. The conclusion was that social media and Web 2.0 technologies were necessary and positive for training and developing American expatriates. However, the literature reviewed for this thesis also concluded that host country mentorship and experiential in-person learning is crucial for learning. These two findings directly contradict because it concludes that an expatriate cannot be successfully trained or integrated if the training is not held experientially in person. In essence, it is concluding that virtual and social media training will lose the strength and effect of training as it would be in-person and experientially. As companies increase their spending on virtual training and Web 2.0 technologies, how can they bridge this gap and keep learners and employees actively engaged? How can social media bridge the gap between home country and host country mentors for expatriates? This would be an area of opportunity to explore how Web 2.0 and social media training can still keep learning interactive, as it would be live in face-to-face training.

Another gap in research and area of opportunity to focus on is the fact that numerous research studies conducted in the 1990s and early 2000s state that human

resource and leadership departments should own training and development. As companies continue globalizing and departments, including human resources, gets outsourced globally to third-party firms, or are completely eliminated, will it still be human resources departments that own the training process? Who should be managing training and development when social media and Web 2.0 technologies are implemented to streamline developing expatriates? And how will Web 2.0 and social media technologies change traditional learning and development departments and training professionals?

A third gap and area of further study is the fact that many of the resources and literature focus on the longevity of employees who have long-term success based off the number of years they have been working for one company. The resources generally depict Americans as disloyal and non-committal compared to their European or Japanese counterparts. However, most of this research was conducted in the 1980s, 1990s, and early to mid 2000s, before the global recession hit in 2008. Many employees including American and foreign expatriates lost their jobs overseas or job-hopped after the recession of 2008. The landscape of what defines “success” has changed in recent years as less expatriates and employees stay at one company long-term. There hasn’t been research conducted about training and development programs for expatriates after the recession of 2008 or how the recession changed the landscape of training and development. This would be an area of opportunity to explore the current training landscape, and how Web 2.0 and social media technologies can bridge that gap.

Finally, a major gap in this thesis research is centered around only focusing on the traditional male expatriate who moves overseas with their wife and children. There are limited research and studies conducted around single professional expatriates, single

women expatriates, or married female expatriates who bring their spouse and children overseas for an international assignment. An area of opportunity of research that will not be addressed in the study that can be studied in the future includes benchmarking American expatriates encompassing different genders, family statuses, and generations to diversify the field of studying expatriates.

As we explore these conclusions, gaps, and future areas of studies, we will address how Web 2.0 and social media technologies can address many of these questions and topics. The next chapter describes the methods used in the present study.

Chapter 3

Methods

This study examined the use of technology-based training and development within expatriate populations after the 2008 global recession. Three research questions were explored:

1. In what ways did the 2008 global recession affect expatriate training and development?
2. What training is delivered to expatriates and when is it delivered?
3. What methods of training delivery are used with expatriates?

Research Design

This study used a quantitative research design and collected data through one online survey. The study results were shared in person with a group forum of training and development practitioners to exchange reactions and receive feedback. The group was formed through networking with American Chamber of Commerce chapters, the San Francisco Golden Gate Chapter of ASTD, and the National Chapter of ASTD.

Sampling

Participants were recruited using non-probability sampling techniques—specifically, a convenience sampling wherein candidates were solicited through the researcher’s network and through social media technologies, including LinkedIn, Twitter, the American Chamber of Commerce, ASTD, American expatriate associations, American School in Japan alumni network, Pepperdine University’s master’s of science in organization development program, University of Oregon alumni association, and former colleague networks from Deloitte, Merrill Lynch, Robert Half International, and various Silicon Valley startups.

A criterion sampling strategy also was used, in that the participant needed to be an American expatriate who was living and working overseas at the time of data collection. Efforts were made to involve American expatriates working in four continents (i.e., Asia, Europe, South America, Middle East) to get a variety and diversity of samples and eliminate bias in responses.

Participants received informal notices and invitations to participate in the study. The eventual sample was self-selected and included 46 participants.

This project was conducted within the oversight of Pepperdine University's Institutional Review Board. All human subjects protections were observed. Participant identities were kept confidential and all data were collected anonymously. Each participant had to provide their consent to participate before proceeding to complete a survey.

Measurement

A 27-item survey (see Appendix) was designed for this study. The survey collected information on four topics:

1. Participant demographics. Thirteen questions solicit information about the participants' demographic characteristics, such as their age, gender, and marital status; employment information; and information about their assignment and overseas experience.
2. Impacts of the 2008 global recession. Three questions ask about the impact of the 2008 global recession on the participants and their companies, including whether they have been laid off and whether their company has cut back on training and development.
3. Timing and content of training. Three questions ask about the timing, content, and effectiveness of the expatriate training participants received from their companies.

4. Methods of training delivery. Eight questions ask about the way they received their expatriate training—that is, whether it was in-person, technology-based, or a hybrid of both and who delivered the training. Participants also were asked to indicate the effectiveness of the training methods and their method preferences. Unfortunately, the choices did not allow for an answer that indicated the participants did not receive any training. This would have allowed a better reporting of percentages, such as “of those who received training, 50% reported” Instead, only 12% of participants reported an answer to this question. An open-ended question asking for how the training was received also would have strengthened the data.

Data Analysis

Frequency analyses were performed and reported for participants’ demographic data, impacts of the 2008 recession, training timing and topics, and training methods. Mean and standard deviation statistics were calculated to assess training effectiveness. The next chapter reports the results.

Chapter 4

Results

The purpose of this study was to examine the use of technology-based training and development within expatriate populations after the 2008 global recession. Three research questions were explored:

1. In what ways did the 2008 global recession affect expatriate training and development?
2. What training is delivered to expatriates and when is it delivered after 2008?
3. What methods of training delivery are used with expatriates after 2008?

This chapter reports the results. Participant demographics are reported first, followed by the results for each research question. Findings related to the impacts of the 2008 recession are reported, following by findings regarding training timing and topics, and findings related to training methods. The chapter closes with a summary.

Participant Demographics

A total of 46 participants answered the survey. Their demographics are presented in Table 1. More men (58.7%) than women (41.3%) completed the survey. Roughly one third (32.6%) of participants were aged 23 to 29 years and another third (37%) were aged 30 to 35 years. Slightly more than half (52.2%) were single.

Two-thirds of the participants were from five sectors: technology (25.0%), consulting (18.8%), finance and banking (9.4%), education (9.4%), and science (6.3%). More than half were from companies employing 1000 people or fewer. Roughly one third (37.9%) held managerial roles at their companies and another third (31.0%) were employees or individual contributors.

Table 1
Participant Demographics

Basic Demographics		
<u>Gender</u> Male: 58.7% Female: 41.3%	<u>Age</u> 23–29 years: 32.6% 30–35 years: 37.0% 36–40 years: 8.7% 41–45 years: 4.3% 46–50 years: 2.2% 50–60 years: 8.7% 60 years and over: 6.5%	<u>Family Status</u> Married: 23.9% Married with children: 23.9% Single: 52.2%
Company Information		
<u>Industry</u> Technology (25.0%) Consulting (18.8%) Finance & Banking (9.4%) Education (9.4%) Science (6.3%) Health care (3.1%) Consumer Goods (3.1%) Travel & Hospitality (3.1%) Accounting (3.1%) Government (3.1%) Other (15.6%)	<u>Organization Size</u> Less than 50 people (16.7%) 51–100 people (10.0%) 101–500 people (16.7%) 501–1000 people (10.0%) 1001–2000 people (6.7%) 2001–5000 people (6.7%) More than 5,000 people (3.3%) More than 10,000 people (30.0%)	<u>Role</u> Executive (27.6%) Manager (37.9%) Assistant Manager (3.4%) Employee or Individual Contributor (31.0%)
Assignment Experiences		
<u>Continent</u> Europe (15.2%) Asia (41.3%) South America (2.2%) Middle East: (4.3%) Not reported (37%) <u>Multiple assignment countries</u> Yes (41.3%) No (28.3%) Not answered (30.4%)	<u>Current Country</u> Japan (15.2%) China (8.7%) United Kingdom (6.5%) Singapore (6.5%) United States (6.5%) Bangladesh (4.3%) Germany (4.3%) India (4.3%) United Arab Emirates (2.2%) Pakistan (2.2%) Brazil (2.2%) Austria (2.2%) Not answered (34.8%)	<u>Lived outside U.S. more than 3 years</u> Yes (34.8%) No (34.8%) Not answered (30.4%) <u>Lived outside U.S. before 2008 recession</u> Yes (41.3%) No (28.3%) Not answered (30.4%) <u>Total years abroad</u> Less than 1 year (3.1%) 1–2 years (12.5%) 2–3 years (12.5%) 3–5 years (15.6%) 5–7 years (6.3%) 7–10 years (6.3%) More than 10 years (43.8%)

N = 46

One fifth (41.3%) were on assignment in Asia and 15.2% were on assignment in Europe. One fifth (41.3%) also reported having completed assignments in multiple

countries. The most commonly reported country of current assignment was Japan (15.2%), followed by China (8.7%). Roughly one third (34.8%) reported having lived outside the U.S. for more than 3 years and nearly half (43.8%) reported having lived abroad more than 10 years.

Impacts of 2008 Recession

Minimal impacts of the 2008 recession were reported by participants (see Table 2). Only 8.7% reported being laid off as an expatriate after the recession and only 13% reported that their company significantly cut back on training and development as a result of the recession. Methods of cutting back included switching to technology-based training (13%) and a combination of eliminating training completely, offering regional training, and switching to technology-based training (19.6%).

Table 2

Impacts of 2008 Recession

Impact	Yes	No	Not answered
Laid off as an expatriate after recession	4 (8.7%)	28 (60.9%)	14 (30.4%)
Company significantly cut back on training and development	6 (13.0%)	21 (45.7%)	19 (41.3%)
Method of cutting back			
Training became technology-based rather than instructor led live classes: 6 (13.0%)			
Combination of eliminating training completely, offering regional training, and switching to technology-based training: 9 (19.6%)			
Not answered: 31 (67.4%)			

N = 46

Training Timing and Topics

Participants were asked about the timing of the training they received (see Table 3). More than half the respondents (60.9%) did not answer the question and only 15.2% reported receiving training before departure. The remainder reported receiving it after

their arrival on assignment (32.6%) and 28.3% reported received training ongoing during the assignment. Only 4.3% reported receiving training after returning home from assignment.

Table 3

Timing of Training Received

Timing	N (%)	Effectiveness ¹
Before departure	7 (15.2%)	
Post-arrival	15 (32.6%)	N = 11 1.55 (0.82) ³
Ongoing during assignment	13 (28.3%)	
Repatriation after the expatriate returns back home	2 (4.3%)	N = 6 2.33 (0.82)
Not answered	28 (60.9%)	

N = 46; ¹1 = effective, 2 = neither effective nor ineffective, 3 = ineffective; ²Score for Host-country mentorship vs. Home-country mentorship; ³ Score for Post-arrival training vs. Pre-arrival training

Participants were asked about the topics covered during their training and the effectiveness of this training (see Table 4). More than half the participants (65.2%) did not answer this question. Only 10.9% reported receiving language training and only 17.4% reported receiving cross-cultural training.

Table 4

Training Topics and Training Effectiveness

Question	Yes	No	Not answered	Effectiveness ¹
Language training	5 (10.9%)	11 (23.9%)	30 (65.2%)	N = 9 2.11 (0.78)
Cross-cultural integration	8 (17.4%)	8 (17.4%)	30 (65.2%)	N = 11 1.82 (0.75)

¹1 = effective, 2 = neither effective nor ineffective, 3 = ineffective

Participants also were asked about two other types of training sometimes given to expatriates: family and spouse training and mentorship at the host country (see Table 5). No participants reported receiving family and spouse training, with the majority (69.6%) not answering this question. Nevertheless, six participants did evaluate the effectiveness

of this training as low ($M = 2.50$, $SD = 0.55$). It is unclear whether this score was a reflection of it not being offered or whether these six participants actually did receive this kind of training and found it ineffective. Although two thirds (67.4%) of participants did not answer the mentorship question, 17.4% reported they did receive mentorship at the host country and 15.2% reported they did not receive such mentorship. When asked to compare the effectiveness of host-country mentorship v. home-country mentorship, host-country mentorship received very low scores ($M = 1.67$, $SD = .78$).

Table 5

Training Audience, Type, and Effectiveness

Training Type	Yes	No	Not answered	Effectiveness ¹
Family and spouse training	0 (0%)	14 (30.4%)	32 (69.6%)	N = 6 2.50 (0.55)
Mentorship at the host country	8 (17.4%)	7 (15.2%)	31 (67.4%)	N = 12 1.67 (0.78) ²

¹1 = effective, 2 = neither effective nor ineffective, 3 = ineffective; ²Score for Host-country mentorship vs. Home-country mentorship; ³ Score for Post-arrival training vs. Pre-arrival training; ⁴Not measured

Training Methods

When asked about the training delivery method, 23.9% of the participants reported they received in-person training, whereas 19.6% received hybrid training (defined as a combination of in-person and technology-based training), and only 6.5% reported only receiving technology-based training (see Table 6). Of these types, hybrid training was rated as being most effective ($M = 5.78$, $SD = 2.17$), followed by in-person training ($M = 4.43$, $SD = 3.57$). Technology-based training received the lowest scores for effectiveness ($M = 3.08$, $SD = 2.39$). Later in the survey, when participants were asked to rate the effectiveness of technology-based v. in-person training, the scores again indicated a slight preference for in-person training ($M = 4.86$, $SD = 2.57$). These preferences were again reiterated directly when participants reported their preferences:

26.1% preferred in-person, 21.7% preferred hybrid, and only 2.2% preferred technology-based. The effectiveness of experiential and group learning also was rated very low ($M = 1.44$, $SD = 0.73$) compared to traditional, classroom-based learning.

Table 6

Method and Effectiveness of Training Received

	N (%)	Effectiveness
Method		
In-person	11 (23.9%)	$N = 21$ $4.43 (3.57)^2$
Technology-based	3 (6.5%)	$N = 12$ $3.08 (2.39)^2$
Hybrid ¹	9 (19.6%)	$N = 9$ $5.78 (2.17)^2$
Experiential and group learning v. Traditional, classroom-based training	³	$N = 9$ $1.44 (0.73)^4$
Not answered	23 (50%)	
Effectiveness of technology-based v. in-person		$N = 14$ $4.86 (2.57)^2$
Training preference		
Technology-based	1 (2.2%)	
In-person	12 (26.1%)	
Hybrid ¹	10 (21.7%)	
Not answered	23 (50%)	

¹Combination of in-person and technology-based; ²1 = completely ineffective, 10 = completely effective; ³Not measured; ⁴1 = effective, 2 = neither effective nor ineffective, 3 = ineffective

Participants also were asked about the method of technology-based training they received (see Table 7). Although most participants did not answer these questions, 19.6% of participants reported receiving training through Webinars and e-learning. Only 6.5% reported receiving training through social media, recordings, or video chat.

Finally, participants were asked to identify the department that delivered the training (see Table 8). Although more than half (52.2%) did not answer this question, the three most common responses were that training was delivered by (a) a training and development or learning team (15.2%), (b) an external learning company (15.2%), or (c) their department (13.0%).

Table 7***Method of Technology-Based Training Received***

Method	Yes	No	No answer
Social Media	3 (6.5%)	7 (15.2%)	36 (78.3%)
Webinars	9 (19.6%)	3 (6.5%)	34 (73.9%)
Elearning	9 (19.6%)	2 (4.3%)	35 (76.1%)
Recordings	3 (6.5%)	7 (15.2%)	36 (78.3%)
Video Chat	3 (6.5%)	7 (15.2%)	36 (78.3%)

Table 8***Department Delivering the Training Received***

Department	N (%)
Training & development or learning team	7 (15.2%)
External training company	7 (15.2%)
Your Department (not human resources or training)	6 (13.0%)
Human resources team	2 (4.3%)
Not answered	24 (52.2%)

Summary

A total of 46 participants answered the survey. Findings related to participant demographic data as well as their perceptions regarding the impacts of the 2008 recession, training timing and topics, and training methods were reported. The next chapter discusses the results.

Chapter 5

Discussion

This study examined the use of technology-based training and development within expatriate populations after the 2008 global recession. Three research questions were explored:

1. In what ways did the 2008 global recession affect expatriate training and development?
2. What training is delivered to expatriates and when is it delivered?
3. What methods of training delivery are used with expatriates?

Summary of Key Findings

Impacts of the 2008 global recession. Participants reported few impacts of the 2008 recession, with only 8.7% reporting being laid off and only 13% reporting company cut backs on training and development as a result of the recession. These findings are inconsistent with past literature, which suggested that many companies downsized and opted to save costs by significantly cutting back on travel and in-person meetings. The present study's findings suggest that other reasons may have been at play that prompted companies to retain their expatriates and the training offerings for them. Such reasons could include that the expatriates possessed top talent and that the organizations may have recognized the link between expatriate training and expatriate success. Another possibility is the survey questionnaire did not ask the questions in a way that the respondent could answer. Findings for my question may have been inconclusive because few respondents answered the survey questions, which gave less than robust results. Surveys performed on larger samples might yield different results.

Timing and content of training. Participants most commonly reported receiving training after their arrival on assignment versus receiving it ongoing during the assignment, before departure, or post-assignment. Few participants reported receiving cross-cultural training and even fewer reported receiving language training. Additionally, no participants reported receiving family and spouse training (although six participants rated this type of training as having little effectiveness). Few participants reported receiving mentorship in the host country and those who did reported it as having little effectiveness compared to home-country mentorship.

These findings are in contrast to Wang and Tran (2012), who asserted the importance of pre-departure training in addition to post-arrival training. Moreover, the present study's findings confirm that few participants received language or cross-cultural training, which could explain the observed differences in the success of American expatriates versus expatriates from other countries (Farh & Bartol, 2010; Simonin & Ozsomer, 2009; Tung, 1987).

The present study's findings also depart from studies that emphasized the importance of family and spouse training (Dunbar & Katcher, 1990; Mendenhall & Stahl, 2000; Mervosh & McClenahan, 1997; Tung, 1987). However, the present study's findings may be the result of having a substantial number of unmarried respondents. Additionally, whereas past literature stressed the importance of host-country mentorship (Ghafoor et al., 2011), the present study's participants rated this type of mentorship as less effective than home-country mentorship.

In summary, the present study generated several questions about the timing and content needed to promote expatriate success. Namely, more research should be

conducted on the training needs of single expatriates and the nature of successful home-country and host-country mentorships.

Methods of training delivery. Participants more commonly reported receiving in-person training versus hybrid or strictly technology-based training. Hybrid training was rated as being most effective, followed by in-person training. Participants repeatedly reported a preference for in-person training and least preferred technology-based training. The most commonly reported types of technology-based training administered were Webinars and e-learning, followed by social media, recordings, or video chat.

Participants reported being trained by a training and development or learning team, an external learning company, or their own departments. This was interesting because the majority of the respondents were under age 35, and therefore likely to be comfortable with social media.

This research supports the limited literature that was available on technology-based virtual and social media training, which found that these forms detract from training effectiveness even while companies increase their budget and spending on such methods. However, overall, the body of literature is limited regarding the use of social media for training expatriates. The present study helped fill this gap, namely, suggesting that American expatriates do not want to be trained with social media. This is an important complement to past literature and studies, which focused primarily on European and Asian companies prior to the 2008 recession in that the present research expanded participation to single, female expatriates and those working in the South America and the Middle East within the current economic climate.

The findings generated through this study suggest that, based on participants' reports, technology-based training is not perceived as in-person or hybrid training. It

follows that expatriates who are trained exclusively through technology-based means may be less prepared for cross-cultural and intercultural integration. Although not examined in the present research, the reason for the lower effectiveness may be because social media and virtual training allows for less interaction with trainers and other classmates. Face-to-face interaction may be critical for developing intercultural competence because few of the respondents had social media training experience.

It is important to keep in mind the low response rate for all the of the survey questions. If all 46 respondents had answered all or nearly all the questions, the findings might be quite different. Nevertheless, based on the present findings, companies may want to invest more in in-person training or hybrid training than in technology-based training.

Limitations

This study was performed on a small sample of expatriates and many respondents did not complete the entire survey, thus, making the sample even smaller. It was not uncommon for one half to three quarters of the sample to not respond to a question. Had the sample been larger or all the participants responded to each question, it is very possible that the results may be different. Future studies should draw a larger initial sample to control for the effects of nonresponse.

The study was conducted using an online survey; therefore, it is possible that respondents did not understand the questions asked and, thus, they might have provided inaccurate answers. This could again skew the results. Future studies should pilot the survey and solicit feedback from test respondents to assure that the survey is as clear as possible. Another limitation is that it was a convenience sample and, therefore, may not represent the overall population of expatriates.

Recommendation for Future Research

Future researchers should examine American expatriate training and development programs further to study the effects of blended and technology-based repatriation programs. Few participants reported having received training; therefore, it would be beneficial to understand how that contributes to the expatriate experience.

The present study generated several questions about the timing and content of training needed to promote expatriate success. Namely, more research should be conducted on the training needs of single expatriates and the nature of successful home-country and host-country mentorships.

Summary

This study examined the use of technology-based training and development within expatriate populations after the 2008 global recession. This study used a quantitative research design and collected data through one online survey. The study results were shared with a live group forum of training and development practitioners. The live group was surprised by the results of the study, and the majority were in agreement. A few group members disagreed with the results. The group was formed through networking with American Chamber of Commerce chapters, the San Francisco Golden Gate Chapter of ASTD, and the National Chapter of ASTD. A total of 46 participants answered the survey. Findings related to participant demographic data as well as their perceptions regarding the impacts of the 2008 recession, training timing and topics, and training methods were reported. The study findings indicated that the 2008 global recession did not have a strong impact on these participants, they tended to receive training after they arrived onsite. Technology-based training was not viewed as highly effective by expatriates. Rather, it is traditional instructor-led classroom training that best

prepared American expatriates for their work assignment abroad, second to blended learning of classroom and technology training.

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Appendix: Survey

1. Are you an American / US Citizen? (Unfortunately this research study requires US Citizen survey participants).

a.) Yes

b.) No

2. What is your sex?

a.) Male

b.) Female

3. What is your family status?

a.) Married

b.) Married with children

c.) Single

4. What is your age range?

a.) 23 – 29

b.) 30 – 35

c.) 36 – 40

d.) 41 – 45

e.) 46 – 50

f.) 50 – 60

g.) 60+

5. What continent do you currently work in?

a.) Europe

b.) Asia

c.) South America

d.) Middle East

6. What country do you currently work in?

7. Have you been living outside the US for more than 3 years?

a.) Yes

b.) No

8. Have you lived outside of the U.S. since before or after the Recession of 2008?

a.) Before

b.) After

9. Have you ever been laid off as an expatriate after the global recession of 2008?

a.) Yes

b.) No

10. How many years total have you lived abroad?

a.) Under 1 year

b.) 1 – 2 years

c.) 2 – 3 years

d.) 3 – 5 years

e.) 5 – 7 years

f.) 7 – 10 years

g.) More than 10 years

11. Have you lived in more than one foreign country as an expatriate? (Not including the U.S.)

a.) Yes

b.) No

12. What industry is your organization?

a.) Consumer Goods

b.) Technology

c.) Health care

d.) Science

e.) Travel & Hospitality

f.) Finance & Banking

g.) Accounting

h.) Consulting

i.) Government

j.) Education

k.) Other

13. How big is your organization?

a.) Less than 50 people

b.) Between 51 – 100 people

c.) Between 101 – 500 people

d.) Between 501 – 1000 people

e.) Between 1001 – 2000 people

f.) 2001 – 5000 people

g.) more than 5,000 people

h.) more than 10,000 people

14. What is your role at your company?

- a.) Executive
- b.) Manager
- c.) Assistant Manager
- d.) Employee / Individual Contributor
- e.) Trainee / Intern

15. Has your company cut back on training and development funding significantly since the Recession of 2008?

- a.) Yes
- b.) No

16. How has your company cut back on training and development?

- a.) Eliminated training completely
- b.) Regionalized training (vs. national training at headquarters)
- c.) Training became technology-based rather than instructor led live classes
- d.) Combination of the above

17. If your company provided training & development for your overseas assignment, what was provided?

- a.) Training prior to your departure
- b.) After your arrival in your host country
- c.) Ongoing training while living in your host country
- d.) A and B
- e.) B and D
- f.) A and D
- g.) All of the above (A, B, C)

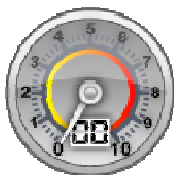
18. Which organization department trained you?

- a.) HR team
- b.) Training & Development / Learning Team
- c.) Your Department, not HR or Training
- d.) A training company that is not part of your organization (outsourced)

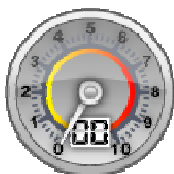
19. Was your training delivered in person, or via technology?

- a.) In person training
- b.) Technology training
- c.) Combination of in-person and technology training

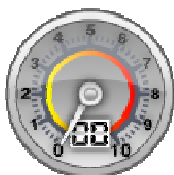
20. If your training was delivered in person by a live instructor, on a scale from 1 – 10, 10 being the highest, how effective did you think your company's training & development program was for preparing you to live abroad in your host country?



21. If your training was delivered via technology (social media, elearning, webinars), on a scale from 1 – 10, 10 being the highest, how effective did you think your company's training & development program was for preparing you to live abroad in your host country?



22. If your training was hybrid combining live instructor classroom training and technology-based (social media, elearning, webinars), on a scale from 1 – 10, 10 being the highest, how effective did you think your company's hybrid training & development program was for preparing you to live abroad in your host country?



23. If your training was delivered via technology, were these tools used?

	Yes	No
Social Media	<input type="radio"/>	<input type="radio"/>
Webinars	<input type="radio"/>	<input type="radio"/>
Elearning	<input type="radio"/>	<input type="radio"/>
Recordings	<input type="radio"/>	<input type="radio"/>
Video Chat	<input type="radio"/>	<input type="radio"/>

24. What was covered in training?

	Yes	No
Language training	<input type="radio"/>	<input type="radio"/>
Cross-cultural integration	<input type="radio"/>	<input type="radio"/>
Family and spouse training	<input type="radio"/>	<input type="radio"/>
Mentorship at the host country	<input type="radio"/>	<input type="radio"/>

	Yes	No
Training after arriving in the host country	<input type="radio"/>	<input type="radio"/>
Repatriation after the expatriate returns back home	<input type="radio"/>	<input type="radio"/>

25. How effective would you say the training was?

Language training

Cross-cultural integration

Family and spouse training

Host-country mentorship vs. Home-country mentorship

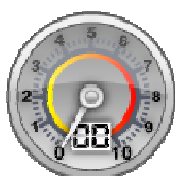
Post-arrival training vs. Pre-arrival training

Repatriation after the expatriate returns back home

Experiential and group learning vs. Traditional, classroom-based training

Repatriation after the expatriate returns back home

26. On a scale from 1- 10, 10 being the highest, how effective did you think this training was compared to in-person instructor led training?



27. Do you prefer technology training or live instructor led training?

- a.) Technology training
- b.) Live instructor training
- c.) Hybrid technology training and live instructor training