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**EVALUATION OF AN EXPATRIATE PROGRAM AT A US-BASED
MULTINATIONAL CORPORATION**

**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
Victoria J. Hurlock**

August 2013

This research project, completed by

VICTORIA J. HURLOCK

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 expatriate program at one multinational manufacturing and aerospace organization. Eleven expatriates were interviewed. Study findings provided insights about participants' experiences during each phase of their expatriate assignment, including selection, preparation, arrival, adaptation, and repatriation. Participants were mixed in their evaluation of the company's expatriate program, with some believing it worked well and others believing it needed improvement. Participants offered six recommendations to the organization: (a) pick qualified individuals for assignment, (b) help them take care of the details, (c) provide them with adequate training and information, (d) involve knowledgeable others in the process, (e) plan for the expatriates' return in advance, and (f) allow for returning expatriates to debrief. Continued research should examine expatriation in other settings, gather the perspectives of the many stakeholders to the expatriate process, and conduct action research based on the recommendations offered in this study.

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Chapter 1

Introduction

Approximately 6 million US citizens currently live abroad, thus meeting the definition of the term *expatriate* (Bachmann, 2013). McEvoy (2011) elaborated that within a business context, expatriates are workers who are sent to another country to live and work temporarily, typically in response to a particular need for knowledge, skill, or experience. Multinational organizations such as IBM, Exxon, Texaco, McDonalds, and HP often rely on expatriates to implement international business strategies and fill needed technical or leadership gaps (Gabel-Shemueli & Dolan, 2011).

Although global mobility of a multinational's workforce and staffing needs through expatriate assignments sound beneficial, estimates of expatriate assignment failure, defined as early return to home country or underperforming while on assignment (Baruch & Altman, 2002; Black, Mendenhall, & Oddou, 1991; Welch, 2003), have been reported as ranging from 25% to 40% (Forster, 1997; Hogan & Goodson, 1990; Sanchez, Spector, & Cooper, 2000; Solomon, 1994). More recent estimates by Strubler, Park, and Agarwal (2011) suggest a 16% to 70% failure rate.

The costs of expatriate failure are many, including psychological distress, damaged business relationships, and damage to expatriate's and company's reputations. Monetary losses also are extensive: McCaughey and Bruning (2005) estimated relocation costs for the early repatriation of a single executive to range from US\$60,000 to US\$250,000. Other researchers have estimated the costs to be even higher (Cerimagic, 2011; McEvoy, 2011). Due to these staggering costs, it is important to understand what causes expatriate failure and how it might be avoided. McCaughey and Bruning concluded based on their research that an average of 30% of US and UK expatriate

placements end in failure because of a disconnect between human resources and management policies and expatriate practices.

Additional research has been conducted on how expatriate failure can be avoided. Strubler et al. (2011) concluded that organizations need more effective selection mechanisms and extensive briefing sessions that include goal setting and performance expectations, rather than focusing only on education about the sociocultural limitations of functioning in the host country. Several studies have concluded that success is enhanced through various types of cross-cultural preparation, such as making several pre-trips to the assignment country (McEvoy, 2011), cross-cultural training (Bhawuk & Brislin, 2000; Black & Mendenhall, 1989, 1990; Deshpande & Viswesvaran, 1992; Morris & Robie, 2001), and testing and developing candidates' abilities to adapt to other cultural settings (Gabel-Shemueli & Dolan, 2011; Strubler et al., 2011). This study examined the extent to whether these best practices were being applied in one company's expatriate program and what the success of the expatriate program was according to its participants.

Purpose of the Study

This study examined the design and impacts of an expatriate program at a large multinational organization. The following research questions were examined:

1. What were the expatriates' experiences?
2. What are the expatriates' evaluations of the program?
3. What are the expatriates' suggestions for the program?

Study Setting

ABC Multinational is headquartered in Chicago, Illinois, and has locations throughout the US and world. It operates in the manufacturing and aerospace industries and employs more than 170,000 people in more than 70 countries. More than 140,000 of

its employees hold college degrees. The company has two business units: commercial and defense. This organization routinely sends expatriates around the world as needs arise in host countries and the company has a robust expatriate program in place.

Therefore, this organization was a suitable setting for examining the application and impact of an expatriate program.

Significance of the Study

Examining both the design and impacts of an expatriate organization within a large multinational organization produced valuable insights for the study organization that also may contribute to the body of knowledge on expatriation. By documenting how the program is being executed, it is possible to evaluate whether best practices advocated in expatriate research and literature are being leveraged. By offering clear recommendations to expatriates, their home managers, their onsite managers and teams, and to human resources and other organizational support functions, it may be possible to continuously improve the organization's expatriate program for the benefit of all stakeholders. If implemented, the expatriate failure rate may be reduced and expatriate performance and results may be enhanced. These are valuable contributions, given the staggering tangible and intangible costs of expatriate failure (McCaughey & Bruning, 2005) and the relatively high incidence of failure (Baruch & Altman, 2002; Black et al., 1991; Forster, 1997; Hogan & Goodson, 1990; Sanchez et al., 2000; Solomon, 1994; Strubler et al., 2011; Welch, 2003). Other organizations also may be able to use the insights generated through this study to create a new expatriate program or to improve their existing programs.

Organization of Study

Chapter 2 explores provides a review of relevant literature. Theories, models, and studies on expatriation, culture, and corporate acculturation programs are examined.

Chapter 3 describes the methods used in this study. The research design is described along with the procedures related to participants, data collection, and data analysis.

Chapter 4 reports the findings of the study. Participant profiles are presented first, followed by results related to participants' expatriate experiences, their evaluation of the expatriate program, and their suggestions for the program.

Chapter 5 provides a discussion of the findings. Conclusions and interpretations are presented first, followed by recommendations, limitations, and directions for future research.

Chapter 2

Literature Review

This chapter provides a review of literature relevant to this study. Theories and studies on expatriation are presented first for the purpose of establishing foundational knowledge about expatriation, including its definition and causes of success and failure. Models of culture are presented next, followed by a discussion of acculturation and a process model of expatriation that is based on a synthesis of the literature discussed in this chapter. Finally, a summary of the literature is provided.

Expatriation

McEvoy (2011) defined *expatriation* as “home country nationals sent abroad by the parent company to live and work temporarily in another country” (p. 1). Bachmann (2013) estimated that approximately 6 million US expatriates are in various locations overseas.

Expatriation has been driven by the increasing globalization of business. More than 55% of the revenue from global corporations such as IBM, Exxon, Texaco, McDonalds and HP come from international operations, suggesting the need for global mobility of resources to assure consistent, seamless production and service delivery (McCaughey & Bruning, 2005). Furnham (1997) pointed out that electronic media and decreased transportation costs allow even small businesses to compete internationally. Friedman (2005) added that increased utilization of the internet and new software, the incorporation of that knowledge into business, and the market influx of people from Asia and the former USSR who want more financial success further propel the globalization of business and the subsequent need for expatriates. Assigning personnel—particularly key technical and managerial employees—to overseas assignments additionally helps

multinational companies develop key talent and implement their international business strategies (Brookfield Global Relocation Services, 2009; CARTUS, 2010).

Expatriate success. Expatriate success is traditionally defined as meeting the original assignment goals and predetermined duration of various lengths. Returning early also is acceptable, if the individual has achieved the desired goals. One way of promoting expatriate success is by enhancing their job (McCaughey & Bruning, 2005). That is, practices used to enhance domestic employees' satisfaction could be emulated for expatriate employees and that this, in turn, would benefit the organization and the expatriates alike. McCaughey and Bruning further believed that expatriate success could be bolstered by assuring a suitable design of the expatriate program and monitoring turnover indicators to predict and minimize expatriate failure.

Expatriate failure. Expatriate failure has been defined as early return to one's home country or underperforming while on assignment (McCaughey & Bruning, 2005). Estimates regarding the incidence of failure vary, ranging from 25% to 40% (Forster, 1997; Hogan & Goodson, 1990; Sanchez et al., 2000; Solomon, 1994) to 16% to 70% (Strubler et al., 2011). The difference in these ranges are due to variations in the sampling of the studies and slight differences in the definition of failure.

Failure can be highly detrimental for the organization, expatriate, and his or her spouse or family. First, the organization experiences a substantial loss of revenue, although estimates of the exact impact vary. For example, McCaughey and Bruning (2005) estimated relocation costs for the early repatriation of a single executive to range from US\$60,000 to US\$250,000, whereas Varner and Palmer (2002) estimated the organizational cost for each failed expatriate to range from US\$250,000 to US\$1 million. McEvoy (2011) estimated that the costs range from 1.5 to 3.5 times the employee's

salary. These costs are incurred through moving expenses, income tax assistance, visa, living costs, and other perquisites for the expatriate. Beyond these financial impacts, expatriate failure can be detrimental to the project, the organization's reputation, and the organization's relationships with its host country counterparts.

The expatriates themselves also experience substantial costs when failure occurs. These include psychological and emotional distress, damage to their careers, damage to their relationships, and potential job loss and subsequent financial strain, among others. These impacts can affect the expatriate's family, particularly a significant other, in addition to any psychological and emotional distress they might feel as a result of returning earlier than expected to the US.

Several researchers have stressed the role that families and spouses play in expatriates' success (Dunbar & Katcher, 1990; Mendenhall & Stahl, 2000; Mervosh & McClenahan, 1997; Tung, 1987). As a result, these researchers have emphasized the need for family and spousal cross-cultural training to help them adjust to the assignment culture. Although children tend to experience less negative impacts during expatriate assignments because their routines often are the same or very similar (e.g., attending school, playing sports, spending time with friends), spouses tend to experience substantial and stressful changes to their ways of life (Adler, 1997). They often leave behind many things that support them in their daily lives, such as friends, relatives, and even jobs. Adler found in her research that "approximately half of expatriate spouses are employed prior to the international transfer, whereas fewer than 20% are employed while abroad" (p. 314). Thus, during the assignments, many expatriates' wives transition from becoming employees to stay-at-home moms—a dramatic life change that can increase one's sense of isolation, even when it does not include moving to a different country. In

this less structured role it is important to focus on the transition and initial adjustment issues. Creating a meaningful life in a foreign country is up to the spouse; however, if she or he is unsuccessful in this endeavor, it can increase the stress and chances of failure for the expatriate.

Another reason for expatriate failure that has gained substantial attention is the lack of cross-cultural effectiveness and poor acculturation. For example, Bhawuk and Brislin (2000) concluded based on their studies of expatriates in Western firms that cross-cultural training improves managers' cross-cultural effectiveness and performance; thus, reducing failure rates. Caligiuri, Tarique, and Jacobs (2009) examined the main factors linked to successful international postings and elaborated that functional and technical skills and knowledge are not sufficient for expatriate success; instead, the expatriate's cultural abilities and competencies also need to align with the given cultural setting. The following sections review four models of culture and then examine the issue of acculturation in detail.

Models of Culture

The examination of national culture has been viewed a number of ways over the last 40 years. This chapter reviews four cultural models, including those by Hofstede (1980), House (2004), Trompenaars and Hampden-Turner (1998), and Edward T. Hall.

Hofstede (1980) offered a seminal definition of culture as "collective programming of the mind; it manifests itself not only in values, but in more superficial ways" (p. 1). Based on his study of IBM offices across 76 countries, he developed a five dimensional model that describes how national cultures differ. The five dimensions are (a) power distance, the degree to which the less powerful members of a society accept and expect that power is distributed unequally; (b) uncertainty avoidance, the degree to

which the members of a society feel uncomfortable with uncertainty and ambiguity; (c) individualism, indicating the preference for a loosely-knit social framework in which individuals are expected to take care of themselves and their immediate families only; (d) masculinity, the societal preference in society for achievement, heroism, assertiveness, and material reward for success; and (e) long-term orientation, the societal propensity toward saving, investing, thriftiness, and perseverance in achieving results. He explained that national culture is important because it shapes the way people in that region perceive themselves, others, and the world; think; and behave. These patterns of thinking and interacting, in turn, help produce the external environment in which these individuals operate. Despite the popularity and widespread publication of Hofstede's model, Signorini, Wiesemes, and Murphy (2009) have pointed out that the mere concept of a national culture is flawed, due to the various micro and subcultures present within any one region.

House (2004) built upon Hofstede's (1980) work through the GLOBE study, which examined leaders' cross-cultural effectiveness within 60 countries. House grouped the 60 countries into groups based on their norms, values, and beliefs as defined by Hofstede (1980). House also surveyed more than 17,000 middle managers about 112 leadership characteristics, resulting in a list of 21 leadership characteristics ordered from least to most desirable across cultures. These 21 characteristics were then assembled into six leadership styles. Finally, House predicted which styles would be most and least effective within which cultures. Although House's findings are insightful, it is important to keep in mind that industry and corporate idiosyncrasies can still result in unique subcultures that do not align with House's characterizations or predictions.

Trompenaars and Hampden-Turner (1998) conducted initial research that spanned a 10-year period and incorporated survey responses from more than 46,000 managers in 40 countries. They concluded that national cultures vary based on seven dimensions: (a) universalism versus particularism, (b) individualism versus communitarianism, (c) specificity versus diffusion, (d) neutrality versus emotionality, (e) attainment through achievement versus ascription, (f) sequential versus synchronous time orientation, and (g) internal direction versus outer direction. These researchers added that the particular orientations within a culture are the products of long-term social learning. Moreover, a culture's orientation tends to fall somewhere on the spectrum of each polarity, rather than being an either-or proposition. For example, early American pioneers needed to cultivate individualism to survive and also needed some reliance on community. No cultural orientation is better than the other; rather, the orientation emerged from the collective's need to survive based on its circumstances.

Anthropologist Edward T. Hall posited that cultures vary based on three dimensions: (a) time orientation; (b) space orientation; and (c) context, which refers to the degree of nonverbal context used in communication (as cited in Kittler, Rygl, & Mackinnon, 2011). In high context cultures, the information communicated relies heavily on the context from which it is being presented. In low context cultures, the information tends to be more detailed and explicit. Although Hall's model has received attention and support, Kittler et al. (2011) conducted a review of Hall's original findings to determine if they were still valid and found that "all studies that utilized country classifications are based on less-than-adequate evidence and stem from dated, unsubstantiated claims" (p. 65).

The cultural models discussed in this section provide some insights about how national cultures may vary. Reviewing and understanding a national culture's preferences using one or more of these cultural models can help expatriates anticipate the differences they may encounter on assignment and how they might adapt to enhance their successful adjustment. At the same time, it is important to keep in mind that questions have been raised about the validity and applicability of these classifications; therefore, it is important to apply these with caution.

Acculturation

Acculturation refers to adapting to the norms of the surrounding culture (Oerlemans & Peeters, 2010). Strubler et al. (2011) elaborated that the aim of acculturation is to improve one's satisfaction and ability to cope with one's environment: "[It] is not so much a matter of conformity to a specific culture but is observed as increasing satisfaction in being able to cope because the expatriate learns how to work effectively within the host country" (p. 104). For example, acculturating may involve operating in a new language to establish work relations, coping with language-induced stress, and communicating to co-workers (McCaughey & Bruning, 2005). Acculturation has also been associated with higher employee organizational commitment and performance (Qin & Baruch, 2010). It follows that expatriates and their organizations benefit when acculturation is successful.

Oerlemans and Peeters (2010) explained that for acculturation to occur, expatriates must have sustained firsthand contact with the other culture. That is, it is unlikely to happen through a series of brief visits spread out over an extended period of time. Oerlemans and Peeters added that acculturation is necessary for successful functioning in another culture. Understanding the need for and challenges of

acculturation requires some fundamental understanding of the concept of culture and how cultures differ.

Factors supporting and hindering acculturation. Strubler et al. (2011) explained that acculturation typically occurs according to a U-curve, where arriving expatriates experience a honeymoon phase where everything in the new country is exciting and enjoyable, followed by culture shock and a corresponding drop in adjustment, then a final upward trend toward adjustment and mastery of the new culture. Although this pattern is common and can be anticipated, it is important to understand what factors help to support successful acculturation. This is particularly important to understand, as expatriate managers have frequently pointed to cultural problems as being at the crux of expatriates' challenges at work.

Examination of the literature on acculturation has pointed to four influences on an individual's degree of acculturation: interpersonal and coping skills, cross-cultural training, work challenges, and socialization and adjustment. Several researchers found that the individual's interpersonal and coping skills serve a facilitative and protective function in acculturation. Fisher and Hartel (2003) explained that being able to communicate effectively and build relationships with others helps expatriates form support networks that serve as sources of information, help, and guidance. Lee and Nissen (2010) similarly concluded based on their research that management support, peer support, cooperation, and communication were associated with improved cross-cultural competence. These characteristics have been linked to the Big Five (McCrae & Costa, 2003) traits of extroversion, agreeableness, conscientiousness, emotional stability, and openness, which are predicted to support individuals' attempts to adapt to other cultures (Buss, 1991). A final intrapersonal characteristic important for effective cross-cultural

adaption is being able to cope with psychological stress (Strubler et al., 2011). Strubler et al. added that managing one's emotions also plays a major role in cross-cultural success.

A second area of research has focused on the role of cross-cultural training in promoting expatriate success. Lee and Nissen (2010) explained that knowledge management—particularly the acquisition of tacit knowledge—supports accelerated acculturation. Tacit knowledge refers to knowledge that is unspoken and unwritten, but essential for effectively and efficiently operating within the environment. Achieving tacit knowledge takes time and immersion to develop and critics question whether cross-cultural training can really help expatriates develop this important type of knowledge. Selmer (2005) added that the effectiveness of cross-cultural training may be influenced by various circumstances and that evidence of the effectiveness of cross-cultural training remains inconclusive. Nevertheless, McCaughey and Bruning (2005) emphasized that “training the expatriate in the host-country language is key to the expatriate's ability to communicate with others and successfully interact with host-country nationals, thereby aiding acculturation” (p. 12). Therefore, language training might be the top priority for cross-cultural training.

The demands and characteristics of the work assignment also have been associated with the effectiveness of expatriates' acculturation. That is, time pressures for the expatriate emerging from shifted time schedules and the need to satisfy demands in the home country and on assignment can increase their stress and deplete their energy, willingness, and psychological availability to acculturate (Lee & Nissen, 2010). Lack of clarity about cultural and workplace expectations and lack of information about how the expatriate's work will be measured also can detract from effective acculturation and performance. Therefore, effective performance management for expatriates is essential so

that they are aware of what is expected at the workplace and they have more clarity about how to adapt and adjust accordingly (Claus, Lungu, & Bhattacharjee, 2011).

A final body of research that has examined the antecedents to effective acculturation has focused on socialization and adjustment of the expatriates. Liu and Lee (2008) explained that expatriates that are better socialized in the host country are likely to adjust more effectively. This could be accomplished through pre-trips, establishing mentor and support networks on assignment, and assuring that expatriates have full information about the culture before and during the assignment.

Expatriate support organizations. Several organizations have emerged to support expatriates and their employers. These supporting organizations have assembled acculturation programs and tools to help expatriates anticipate and address the challenges they may experience on assignment.

Aperian Global (n.d.) was founded in 1990 and provides consulting, training, and web tools for global talent development. The organization's web site states that it has partnered with clients in more than 85 countries and delivered 2,150 training workshops in 25 languages. The organization has licensed more than 400,000 users across 125 organizations worldwide to access GlobeSmart. GlobeSmart is an online reference tool that reviews the culture of doing business around the world. Aperian's range of services involve (a) developing global leadership perspective and competencies; (b) delivering face-to-face and virtual team facilitation; (c) building employees' practical business skills that increase cross-cultural effectiveness; (d) creating global diversity strategies; and (e) training, coaching, and web tools for employees and their accompanying family members.

Third-party research was not available regarding the impact or success of Aperian Global's services. However, the company reports that 97% of their students strongly agree that the cultural training sessions have benefitted them and enhanced the success of their international experience. Examining their site and services suggests that it offers a range of valuable products and services for expatriates, their families, and their organizations.

Global LT (2013) is another organization that supports expatriates and their organizations. Their portfolio of cultural training solutions aim to enhance cross-cultural and global collaboration and performance. Global LT offers customized programs for each client, including multicultural training, language training, destination services, and translation services.

Global LT's expatriate training helps individuals and their families adjust to the new environment and prepare for successful interaction both in daily life and business situations in the destination country. Training covers topics such as cultural differences and culture shock, business life, and daily life and city specifics. The typical training duration is 8 to 12 hours. Shorter, customized children's and young adult programs also are available. Global LT also offers a series of case studies that illustrate cultural concepts and help expatriates and their families anticipate what they might encounter and how they would respond.

A third relocation and expatriate support company is Cartus (2004-2013), which describes itself as the industry leader in global mobility and workforce development. It serves corporate, government, and membership organizations of various sizes and types. Cartus is staffed by 2,800 employees (2100 located in the US) and operates strategic service centers worldwide. The company boasts annually supporting more than 140,000

transferees, expatriate assignees, and members across 160 countries. The company offers intercultural and language solutions designed to strengthen individual competencies and support global business performance. The company also designs and delivers customized training offerings on the topics of global leadership development, virtual team performance, multicultural workforce awareness, advanced business communication skills, and M&A cultural integration. Finally, the company offers an online tool called The Country Navigator™ that seeks to enhance expatriates' awareness of cultures and country information.

Process Model of Expatriate Acculturation

Reflecting on the concepts of culture, expatriate success and failure, the factors supporting and hindering acculturation, and the various offerings available through expatriate support organizations provides some insights for a process model of expatriate acculturation. Figure 1 presents the researcher's conceptualization of a Process Model of Expatriate Acculturation. This model suggests that expatriate acculturation occurs in three primary phases:

1. Enhance personal awareness. Personal awareness is enhanced when individuals assess the personal values and beliefs that drive their behaviors and decisions. A variety of cultural assessments are available that are designed to provide insights and information about the respondent's ability to adapt and integrate into culturally diverse situations, such as GlobeSmart assessments, Big Five personality assessments, or the Intercultural Development Inventory (Hammer, 2009).
2. Enhance country and regional awareness. Expatriate success can be further enhanced when expatriates anticipate the changes they may encounter in the new country and how they would deal with these changes. Various models of culture, such as Hofstede's (1980), House's (2004), Trompenaars and Hampden-Turner's (1998), and Hall's, among others, can be helpful in this effort.
3. Enhance awareness of business and industry cultures, customs, and norms. Each business and industry has its own cultural idiosyncrasies, including its

own customs and norms. It is important to consider the unique cultures one may encounter because of these characteristics.

After cultivating and raising one's awareness about oneself, the countries and regions, and the business and industry, the individual needs to synthesize all of this information into a composite understanding of what one may encounter in the new setting and situation. When this synthesis is performed, the individual can leverage this understanding to support decision making in key business areas.

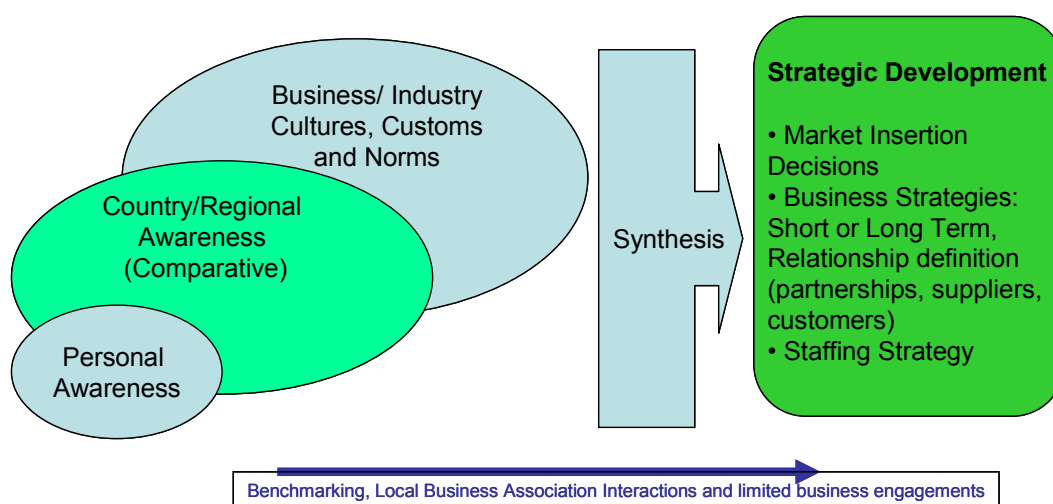


Figure 1: Process Model of Expatriate Acculturation

This model, in turn, leads to specific recommendations for expatriate selection, preparation, arrival and ongoing experiences, and repatriation. Regarding selection, Cerimagic (2011) emphasized that the right person needs to be selected for the job, meaning someone with not only the functional and technical knowledge, but also the cross-cultural knowledge, sensitivity, and skills to effectively navigate a cross-cultural workplace. Friedman and Antal (2005) termed this *cultural competence*, meaning “the ability to generate appropriate strategies of action unconsciously” (p. 81) and *intercultural competence* as

the ability to explore one's repertoire and actively construct an appropriate strategy. Intercultural competence involves overcoming the constraints embedded

in an individual's culturally shaped repertoire, creating new responses, and thereby expanding the repertoire of potential interpretations and behaviors available in future intercultural interactions. (p. 81)

Cerimagic (2011) found that expatriates were more likely to fail if they had not previously worked overseas and if they had not received any cross-cultural training.

Bennett (1998) defined six stages of intercultural competence, which vary based on one's perceptions of and openness to cultural difference. The first three are ethnocentric, meaning they "deny difference, fear that it threatens them, or seek to minimize difference . . . and believe their culture is better than others" (Friedman & Antal, 2005, p. 82). These individuals often face difficulties and misunderstandings in intercultural situations. The three stages are (a) denial of cultural differences, (b) defense (differences are perceived as threatening to one's worldview), and (c) minimization (ignoring cultural differences and asserting that "deep down all people are the same—just human" (Bennett, 1998, p. 27).

The next three stages are considered ethnorelative, meaning that the individual believes that cultural differences exist and he or she may even modify oneself to fit the other culture. The three stages are (a) acceptance (recognizing the viability of different cultural norms), (b) adaptation (shifting into "a different cultural frame of reference" and modifying one's behavior to fit the norms of another culture, (c) integration (reconciling cultural differences and forging a multicultural identity) (Bennett, 1998).

Gabel-Shemueli and Dolan (2011) added that hiring managers may be advised to screen for emotional intelligence as a means for predicting success in cross-cultural encounters. Additional screening should examine the candidate's suitability in terms of personality characteristics, language abilities, previous international experience, family status, and social networks (Claus et al., 2011). For example, McEvoy (2011) found that

overseas assignments tended to be taken by younger, single employees who were looking for an adventure early in their careers.

Qin and Baruch (2010) examined the preparation phase. An important activity during this phase is training, wherein the expatriate can develop his or knowledge of the culture, language, and way of doing business in the assignment country (Cerimagic, 2011; Qin & Baruch, 2010). Waxin and Panaccio (2005) cautioned, however, that the mere existence of cross-culture training is not sufficient; instead, the expatriate must engage in activities related to the training. For example, participants in Cerimagic's (2011) study reported receiving cross-cultural training, language study, taking a preliminary visit to meet local managers, and visiting with others who have been on assignment there. All of these activities gave the expatriate multiple opportunities to learn about the situation they are entering and begin the adaptation process before they depart. Moreover, the greater the differences between the home and assignment culture, the more necessary the training (Waxin & Panaccio, 2005). Another aspect of preparation is that during this phase, a psychological contract is implicitly and explicitly formed with the employee regarding what the assignment will be like and how the organization will support him or her. When this "contract" is perceived to be breached, diminished loyalty and commitment combined with neglect and turnover can be expected. In contrast, when the employee perceives that the contract is favorable and fulfilled, higher organizational commitment, engagement, and performance tend to result (Wellin, 2007). One important component of the psychological contrast is the family package, which refers to the range and nature of benefits offered to support not only the expatriate but his or her family as well. Qin and Baruch (2010) found in their research that the better family package offered by the organization, the higher the expatriate job satisfaction. He also found that

the more varieties offered for the family package, the better the expatriate's adjustment will be to the new environment. McEvoy (2011) found in her examination of expatriate assignments that pre-departure benefits varied, with some organizations including a housing pre-trip, cross-cultural assessment, country orientation, cultural orientation, language training, subsidized travel costs and moving expenses, relocation allowance, and assistance with selling one's home.

On-assignment benefits also vary somewhat from organization to organization, but typically include destination services (e.g., translation, housing locators) and payments and allowances for housing, utilities, children's education, cost of living differences, auto and transportation, and appliances (McEvoy, 2011). Additionally, organizations (particularly human resources) should dedicate attention to clarifying the expatriate's job role and anticipating and resolving any potential position-related issues in advance. Strubler et al. (2011) emphasized that organizations need to have policies and practices in place that support job satisfaction. For example, assigning home country mentors and host country mentors have been shown to help support the expatriate's adjustment process and promote his or her job satisfaction and motivation (McCaughey & Bruning, 2005). One company studied by McEvoy (2011), for example, assigns back-home mentors to every expatriate. They also expect expatriates to use some of their required annual leave time to check in at the home office, which they believe reduces the culture shock upon repatriation.

Repatriation is frequently identified as one of the most stressful components of a foreign assignment (Sanchez et al., 2000). Yan, Zhu, and Hall's (2002) model of organizational repatriation alignment emphasized that repatriation is an essential part of attaining success in the overall assignment. Some companies additionally support

expatriates' return home (repatriation) to help ease transition back into personal and professional home cultures and ward off reverse culture-shock. Although Cendant offers repatriation training for returning expatriates, companies in McEvoy's (2011) study emphasized that the onus is on the returning expatriate to find a new job. Other researchers have similarly found that it is more common for companies to not provide repatriation support. Less attention may be given to repatriation support because the assumption is that the return transition is easier because home culture is known, the work habits are known, and the people the expatriate will interact with are believed to be the same as before (Hyder & Lovblad, 2007).

Ample studies have suggested, however, that repatriation can be equally (if not more) difficult as expatriation (Morgan, Nie, & Young, 2004; Paik, Segaud, & Malinowski, 2002; Stroh, Gregersen, & Black, 1998). Black and Gregersen (1991) conceptualized repatriation adjustment as occurring in three different realms: adjustment to work, adjustment to interacting with home nationals, and adjustment to the general environment and culture. Several researchers have found that culture shock occurs not only during the initial expatriation stage, but also during the repatriation stage (Baruch & Altman, 2002; Bossard & Peterson, 2005; Rodrigues, 1996). Reverse culture shock can happen because while the expatriate is on assignment, both the expatriate and his or her home environment change. When the expatriate assumes that the home environment has not changed at all, dissonance will occur upon return due to having inaccurate expectations (Martin, 1984).

Expatriates have reported dissatisfaction with the manner in which their companies handle the repatriation process (Stahl & Cerdin, 2004). For example, McCaughey and Bruning (2005) found in their study that up to 40% of expatriates report

have no clearly defined position in their parent organization upon returning to their home organizations; moreover, 68% have no guarantee of a position upon their repatriation.

Dunbar and Katcher (1990) concluded based on their research that poor repatriation was the cause of the 40% attrition rate reported for American expatriates once they return home after their assignment. More recent reports have reported similar statistics. The Global Relocation Trends 2003/2004 Survey Report (GMAC, 2004) reports that 23% of US repatriates leave their companies within 2 years of returning from assignment. Baruch, Steele, and Quantrill's (2002) study suggested that 50% of expatriates leave within a few years after returning from assignment. Vermond (2001) similarly reported that 49% of expatriates leave within two years of finishing their assignment.

Summary of the Literature

This chapter examined literature on expatriation, acculturation, and expatriate support organizations, culminating in a process model of expatriate acculturation. Despite the globalization of business and increasing reliance on expatriates, the failure rate for these individuals remains high (McCaughey & Bruning, 2005). The high incidence of failure may be understandable, given the substantial behavioral differences that can exist from culture to culture. This emphasizes the need for effective acculturation among expatriates, referring to the degree to which they adapt to and attain satisfaction with operating within the culture (Oerlemans & Peeters, 2010).

Although acculturation is not a smooth process (Strubler et al., 2011), certain factors do act to support (and, conversely, hinder) effective acculturation, such as interpersonal and coping skills, cross-cultural training, work challenges, and socialization and adjustment. Several organizations such as Aperian Global, Global LT, and Cartus,

among others, have emerged to support expatriates in developing these traits and rising to the challenges of an overseas assignment so that they may be successful.

Overall, examination of these bodies of literature have pointed to the need for appropriate selection, preparation, and support during and after the assignment. This study examined the expatriate program in one organization to assess its effectiveness and consider whether the best practices revealed in the literature are being applied within the study organization's program. The next chapter describes the methods used in this study.

Chapter 3

Methods

This study examined the design and impacts of an expatriate program at a large multinational organization. The following research questions were examined:

1. What were the expatriates' experiences?
2. What are the expatriates' evaluations of the program?
3. What are the expatriates' suggestions for the program?

This chapter describes the methods used in the present study, including a discussion of the research design and the procedures related to participant selection, data collection, and data analysis.

Research Design

This study used a qualitative interviewing design. Qualitative methods allow researchers to develop a deep understanding of the topic within the study context (Creswell, 2008). To allow for this kind of depth of exploration, qualitative researchers draw a small sample and explore a wide range of variables—some of which may not be known at the outset of the study. This is in contrast to quantitative studies, where researchers clearly define a small set of variables and gather data to measure these variables from a large sample. Kvale (1996) explained that qualitative approaches enable researchers to reflect human experience with depth and breadth, generating an authentic impression of the phenomena.

Qualitative research may involve many different types of data collection. The present study specifically used research interviewing. Interviewing allows for the collection of nonverbal communication, feelings, and thoughts—all of which may be difficult to capture through other methodologies (Kvale, 1996). A particular challenge

with interview research, however, is that researchers typically generate a large volume of data that can pose challenges for analysis (Creswell, 2008). Qualitative interviewing was chosen for this study due to the lack of research available on the organization's expatriate program and the importance of gathering expatriates' feelings and thoughts which would be difficult to collect through other study designs.

Participants

Sample size. Interview studies can produce an overwhelming volume of information; therefore, Kvale (1996) urged qualitative researchers to carefully select the sample size. Determining what sample size is appropriate depends upon the nature and purpose of the study. Kvale offered the guideline of interviewing 15 participants, plus or minus 10. For example, studies involving complex topics and multiple interviews per participant may involve five participants, whereas studies examining rather straightforward topics and involving one rather short interview per participant may recruit 25 participants. The sample size for this study was 11 participants, which allowed for the collection of a sufficient amount of data, given that multiple phases of the expatriate experience were examined.

Selection criteria. Selection criteria are specified for research studies to assure that participants are able to produce relevant data (Robson, 2011). Three selection criteria were defined for the present study:

1. The participant completed a minimum of one expat assignment for at least a period of 6 months. The organization has two categories of expatriates: under 2 years (short-term) and at least 2 years (long-term).
2. The participant was employed by the study organization at the time of the study.
3. The participant had not spent more than 2 weeks in the assignment country before the expatriate assignment began. This criteria was established so that the

participant would not have had preexisting comfort and knowledge with the assignment location going into the experience.

Based on the prior and current participants in the program, the researcher also aimed to draw a gender-balanced sample as well as a sample of expatriates with and without children. The final sample consisted of four women and seven men.

Sampling strategy and procedures. *Sampling strategy* refers to the overall design for identifying study candidates. Whereas quantitative studies often use random sampling to promote representativeness of the sample (Creswell, 2008), qualitative sampling strategies tend to be purposive, meaning they intend to draw participants with certain characteristics. Miles and Huberman (1994) outlined 16 different qualitative sampling approaches, each designed to fit particular research designs. The sampling strategies used in this study were criterion, meaning the participants had to meet the selection criteria outlined in the previous section, and convenience, meaning the researcher recruited candidates using her professional network. This combination of approaches allowed the researcher to rather quickly recruit participants who could offer data relevant to the study. The drawback of this approach is credibility of the information, as the findings may lack transferability to other settings.

First, the researcher made a list of fellow employees she knew who were currently on or who had recently returned from an expatriate assignment. Second, she then sent these individuals a study invitation (see Appendix A) to gauge their interest in participating in the study. Interested candidates were asked to contact her by email. When a candidate contacted her, she called them to confirm their eligibility and interest. She then scheduled an interview with them.

Participant descriptions. Eleven participants were included in the present study (see Table 1). Of the eleven, two had completed multiple assignments, for a total of 15 assignments across 11 participants. Five participants were on assignment at the time of the study and six had already completed their assignments. Three of the assignments were 6 months in duration, two were 1 year long, four were 2 years (or nearly 2 years) in duration, four were 3 years in duration, and one was in 4 years long. Four of the assignments were in Japan, eight were in Italy, one was in Israel, and one was in China. Five participants reported that their spouse and children accompanied them on their assignments, two reported that their spouse accompanied them, and four reported that no one accompanied them on their assignments.

Table 1

Participant Demographics

Name	Currently on Assignment?	Assignment Duration	Location	Accompanied by
Tyler	No	1 year	Japan	Wife
Penny	No	6 months	Italy	No family
Michelle	No	2 years	Italy	No family
Mary	No	1 year	Israel	Husband and children
Mark	Yes	4 years	Italy	Wife and child
John	No	22 months	Italy	Wife and children
Jeremy	Yes	3 years	Italy	Wife
Doug	Yes	3 years	Italy	Wife and children
Brandon	Yes	3 years	Japan	No family
Beth	No	2 years	Italy	No family
	No	6 months	Japan	No family
Adam	Yes	3 years	China	Wife and children
	No	2 years	Italy	Wife and children
	No	6 months	Japan	Wife and children

Confidentiality and consent procedures. This study was conducted under the oversight of the Pepperdine University Institutional Review Board and all human subject

protections were observed. Participation for this study was completely voluntary and anonymous. Each participant was required to provide their signed written consent to participate (see Appendix B) before completing an interview.

Participant interview notes were identified by a code. Actual personal and business names were not recorded or reported. Raw data in hard copy form were kept in a locked cabinet at the researcher's home and were destroyed upon the completion of the study. Electronic versions of the raw data will be kept indefinitely for research purposes, although only summarized interview data were reported in the present study. Individual interview responses provided as examples were cited anonymously.

Data Collection

The script for the one-on-one interviews was designed by the researcher with the aim of gathering a complete account of the expatriate's experiences related to their assignment, including their selection, preparation, arrival and ongoing experience, and repatriation.

After answering any questions the participant had about the project or the process of participating, the researcher commenced asking the core interview questions. The questions were organized into six categories:

1. **Basic information.** The researcher asked four questions to ascertain whether the participant was currently on assignment, completion date (or intended completion date) of the assignment, assignment duration, previous expatriate experience, and whether the participant brought any family members on assignment with him or her.
2. **Selection.** Five questions were asked about how the participants learned about and were selected for the assignment. They also were asked to evaluate and offer suggestions for the selection process and what their motivation was for wanting the assignment.
3. **Preparation.** The researcher posed seven questions to gather information about where they went on assignment and how they prepared for the assignment,

including how long in advance they knew about the assignment as well as the training, information, and assessments they and their family received. They also were asked whether spoke the language of the assignment country and were asked to compare their home country with their assignment country. Finally, they were asked to evaluate and offer suggestions for the preparation phase.

4. Arrival and ongoing experience. Six questions were asked to gather information about the participants' arrival in the assignment country and what adjustments they had to make. They also were asked to describe the work location and environment in their assignment country. Finally, they were asked to evaluate and offer suggestions for this phase of the assignment.
5. Repatriation. Participants who had already completed their assignments were asked five questions about their own and their family members' transition back to their home country. They also were asked to describe the work location and environment in upon their return. Finally, they were asked to evaluate and offer suggestions for the repatriation phase.
6. Career impact. The final set of three questions asked participants about the impact of the expatriate assignment on their careers, what worked well, and whether they would consider another expatriate assignment with the company.

The interview ended with the researcher asking an open-ended question designed to gather any additional relevant information that was not yet gathered. The complete interview script is presented in Appendix C.

Each interview lasted 50 minutes to 1 hour, to allow for sufficient data collection without imposing too much on the participants' time. Interviews were completed in person when possible and by telephone for participants who were located remotely. In qualitative designs, the researcher acts as the primary instrument for data collection (Kvale, 1996). As a result, it was important to remain calm, curious, interested, empathic, and engaged. These skills were important for promoting a dynamic interview capable of gathering rich, relevant data. Each interview was audiotaped and transcribed for later data analysis.

Data Analysis Procedures

Content analysis modeled after Miles and Huberman (1994) was used to examine the data. The specific procedures were as follows:

1. The interview transcripts were combined and the data were organized so that the participants' responses were organized by interview question. Each response was coded with the corresponding participant code to distinguish each participant's response from another's.
2. One question at a time, the researcher reviewed all the participants' responses to gain a general impression for the nature of the data generated for the question.
3. The researcher then coded the responses for each question by identifying the codes that emerged within each question and coding each response accordingly. This process was repeated for each question. The initial round of coding was considered complete when this task was finished for each question. The data were reorganized based on the initial codes.
4. Secondary coding then began, wherein the researcher reviewed the initial codes to assure that the data were coded appropriately. Data were recoded and reorganized as necessary. Additionally, the researcher considered whether any initial codes could be grouped together under a supraordinate code. For example, the initial codes of "word of mouth" and "personal initiative" were grouped under the supraordinate code of "finding out about the assignment." Secondary coding was considered complete when all the initial codes had been reviewed and categorized as needed.
5. Following completion of the initial and secondary coding, the complete set of codes and associated data were reviewed to confirm the appropriateness of each code and its wording. Codes were reworded, combined, or expanded as needed.
6. When the code review was complete, the number of participants reporting each theme was calculated.
7. A second coder who is an experienced doctoral-level researcher and dissertation coach reviewed the analysis to determine whether the results appeared to be valid. The researcher provided the second coder with the raw data and asked her to complete Steps 1-6 described above. The researcher and second coder compared their results and, where discrepancies were found in the results, the researcher and second coder discussed and agreed upon how the analysis was revised. Ten discrepancies out of 120 were discovered and resolved when the researcher and second coder compared their results. Chapter 4 reports the finalized analysis.

Summary

The present study used a qualitative interview design. Eleven expatriates at one organization were selected using criterion and convenience sampling strategies. A total of 31 questions were used to gather information about the participants' experiences, evaluation, and suggestions for the expatriate program. The interview data were examined using content analysis procedures. The next chapter reports the results of the study.

Chapter 4

Results

This chapter presents the study results. A profile of the participants is provided first. Participants' expatriate experiences are then reported, including their experiences related to selection, preparation, arrival, and repatriation. Findings related to participants' evaluation of the expatriate program are then documented. The final set of data reported in this study consists of participants' suggestions for the expatriate program.

Participant Profiles

Eleven expatriates were interviewed as part of this study. The majority of participants had no language fluency when they started their assignments, although one individual was fluent in Japanese when he started that assignment and three participants reported they had minimal fluency in the assignment language (see Table 2). Doug, who was assigned to Italy, explained that he knew Italian, "a little bit. I started using Rosetta Stone. Helped with basic vocabulary and phrases. Helps me get into conversational situations when you're here."

Table 2

Language Fluency and Motivation for Expatriation

	n ^a
Language Fluency	
None	8
Minimal	3
Fluency	1
Motivation for Seeking an Expatriate Assignment	
Career development	8
Wanted to or enjoy living overseas	5
Gain the adventure of cultural experience	5
Good timing for family	4
Financial benefits	1
Open to Another Assignment	10

N = 11 expatriates; ^aparticipants reported multiple themes in some cases

The participants voiced various motivations for seeking an expatriate assignment. The most common motivation, voiced by eight participants, was career development. Michelle shared that she wanted to develop her career and also had experience in her family with such experiences: “I wanted the career experience of working with a major corporation in a foreign assignment. My parents did something similar, so I was familiar with the difficulties but also the opportunities it would afford.” For Beth, the expatriate assignment provided a meaningful career experience that helped her make the decision to stay at the company: “I was at a crossroads about whether to stay at [the company] or not. I just decided it was a good opportunity to do something.” For Mark, the expatriate assignment offered opportunities to expand his understanding of the company, in preparation for a career in management:

I wanted to gain skills in dealing with our suppliers internationally, getting insight on how [the company] looks to the outside, and just to stretch my boundaries. If you stay inside [the company] for any length of time, you can become myopic. You don’t necessarily think about how other companies do things. All that makes me a better employee. Eventually, I’d like to be in management at some time. This broadens my scope.

Five participants shared they wanted to live overseas. Adam shared, “we enjoy living overseas. I grew up overseas. I’ve spent about half my life overseas.” Another five participants wanted to gain the adventure of a cultural experience. Penny explained, “

I wanted to see if I could use my skill set in a different culture—to see if I could be effective. I wanted to have the opportunity to go experience a different culture. I hadn’t traveled hardly at all, so it was an interesting opportunity. My family members are grown, so it was a great opportunity to try something different.

Four participants added that the expatriate assignment happened at a good time for the participant’s family. Jeremy shared, “I was looking at my age, where I was. I’m roughly in my late 40s and an opportunity, this type of assignment was best based on my family situation was best as opposed to earlier or later in life.” Adam explained that he

wanted his kids to experience living abroad and that overseas assignments are easier when the children are young:

I was interested in this foreign assignment because I was interested in another international assignment while my children were still elementary school age, before they hit middle school or high school. I felt it would be easier that way. . . . One thing that I've seen is that there's an area generally that it's easier for people to go on assignment when they are single or have small children, or that their children are grown up—in college or working. It's more difficult for people to go on assignment when their children are in middle school or high school. I don't know whether a company needs to look at that to see if they can make it easier for people with middle school or high school aged children, but I think that the company will lose most of those people just because logistically it's very difficult to do that. For example, in Italy it would have been very difficult for high school aged children. There was only one international high school and that was in Brindisi.

Ten of the eleven participants stated they were open to another expatriate assignment with the company. One participant mused, "My wife and I talk about one day being the Japan executive. . . . That would be the sweetest gig."

Participants' Expatriate Experiences

The following sections describe the findings related to participants' selection, preparation, arrival and adaptation, and repatriation. It is important to note that although the participants were assigned to four different countries (i.e., Italy, Japan, China, and Israel), many of the experiences the expatriates described were consistent across the countries. The notable difference is that participants who completed assignments in Japan noted the country's cleanliness and sound infrastructure, which was quite different from the experiences reported in Italy, China, and Israel.

Selection. Participants were asked about the selection phase of their expatriate experiences. The responses revealed insights about how they heard about the assignment and about how they were selected for the assignment (see Table 3). Four of the

participants heard about the assignment by word of mouth or through an announcement.

Adam explained,

When I was on my previous assignment. I learned that there were not sufficient candidates for this assignment, or some candidates didn't work out. When I returned from my previous foreign assignment in Italy, I started to pursue this avenue. Six months later was when everything went through.

Table 3

How Participants Heard about and were Selected for the Assignment

	n
Hearing about the Assignment	
Word of mouth or announcement	4
Personal Initiative	3
Others suggesting or mentioning the opportunity	2
Manager selected me	2
Selection Process	
Informal process	5
Formal, structured hiring process	3
No process	2

$N = 11$

Word of mouth and announcements occurred a couple of different ways. In Michelle's case, the assignment was "announced within the group. [They were] asking for volunteers within supplier management group." For Penny, an "email [was] sent to all managers of all lean practitioners."

Three participants took personal initiative to secure an assignment through networking, setting a performance goal, or responding to a post on an internal job listing website. John shared,

I had always been looking for an international assignment. I introduced myself to a lot of people and told them my name and "I'm one of your most flexible managers and I will work anywhere in the world." One day, they called me up and asked me if I was interested in going to Italy.

For Mark, he explained, "I found out about it because I had it on my performance management as a goal, and then my manager had an opportunity that he needed help in

Italy.” Jeremy shared, “The assignment was posted in the company’s online job listing website. I simply applied for it based on my qualification.”

Other participants heard about the assignments through other people. In two cases, other colleagues told them about the assignments. In Brandon’s case, “A coworker sent me the [posting] for this assignment and said I should think about it and apply.” Beth shared,

My manager had told me about it. Initially, I decided I wasn’t interested. Then a series of life events happened, and I let her know that I was interested and reached out to the hiring manager and had a conversation with him about it.

Two participants were specifically selected by their manager for the assignment. Tyler explained, “My boss pulled me into his office and asked if I wanted to go to Japan because our supplier was having difficulty” In Doug’s case,

I was approached by a senior manager in the organization I was working in. they just said that they had a need for lean practitioners and wondered if I was interested when the person that I replaced was coming to the end of her assignment. [This was] more of a hand-picked opportunity.

After initially hearing about the assignment, the participants experienced different processes to be selected for the position. Five participants went through an informal process, which included an interview, resume review, or business case. Brandon shared his experience:

My understanding when I was brought in for the interview was that they were looking for people that had operations experience working in an assembly environment for production. They interviewed me and asked me about my experience in the assembly area [related to this product] and continuous improvement workshops and activity.

Penny’s process involved only a review of her resume. She explained, “I was informed that if you were interested submit a resume and from that point I received a call that my resume was reviewed and I was being selected.” When Michelle initially inquired

about the position, her manager told her she didn't have enough experience and she was discouraged from applying. Therefore, she was surprised to be contacted for the position a short time later. She explained,

Two weeks later, [my manager] asked me if I wanted to go [because they didn't have enough people and the person they wanted to go wouldn't go]. When I came home [from assignment] at Christmas, I asked him how I was selected after being told so bluntly that it was not really an option. He said that they had an A team of people to send, and some had backed out, so they had to look at other sources, but I was at the top of his list. It was funny flattery from my director. It was not a confidence builder.

Three participants went through a formal, structured hiring process to be selected for the position. Jeremy shared his experience:

It's a structured interview process. I submitted my resume. Presumably, from the other side, a interview panel was selected for interviewing me among other folks. Based on a telephone interview I was provided an offer, which I accepted, and that took me to the next step which was the company started a process called the logistics company supporting expatriation. I was given an offer and I accepted, and a date was established as to when I would start the process of coming over from the States to Italy.

Two participants reported being selected for the position without going through any selection process. John explained,

They called me up to the office and asked if I was interested in Italy. . . . Then they said, "Can you leave tomorrow?" I said I could leave the day after tomorrow. That was it. . . . I went for a 60-day assignment. I came home for about a month, then went over for 20 months. No selection process. . . . Since I'd already been there, the guy who became site leader knew I was interested in international assignment. Based on my performance from my first assignment, [he] selected me to come back.

In summary, participants reported hearing about their assignments through word of mouth or announcement, personal initiative, others suggesting the opportunity, or being selected by their manager. The selection process participants experienced varied in formality.

Preparation. Participants were then asked about their experiences while preparing for their assignments. Overall, two participants emphasized that the preparation phase was too rushed and stressful. Mary emphasized, “More prep time to get things in order would be good.” Brandon elaborated on the stress involved in balancing the personal need to wrap things up at home and prepare for the assignment with the business need to immediately fill the overseas assignment:

It was very fast. It was hard to prepare for the job [plus] . . . leadership wanted you over there yesterday and you haven’t finished [getting] everything prepared. Getting ready to go over for 2 years, there’s a lot to prepare for. It was stressful getting all your ducks in a row. You don’t just fly back to take care of things. The company wants you there fast. They don’t care if you have to get stuff ready or pack a bag or close out a bank account. They want you over there immediately. It is stressful. You have to do everything, and get prepared to go over for two years. You don’t want to get over there and find out you didn’t do something right.

Participants were given varying amounts of notice for their assignments (see Table 4). Three participants reported they had 2 weeks’ notice. Mary shared, “They wanted 24 hours, but it ended up being about 2 weeks.” Mark elaborated,

I knew about 2 weeks before I left that I was going to do the assignment. It was always imminent, so it was weird to prepare for. I didn’t realize it would take a year for me to actually get it. If I’d know that, I would have taken language lessons. I was so busy to get the assignment initiated that I didn’t really get to do the prep that I would have like to have.

Five people were given 1 to 2 months. Jeremy explained, “I would say about 6 weeks. From the time I was provided an offer and I accepted it and the time I arrived in Italy was 6 weeks duration.” Three participants shared they were given 3 to 6 months to prepare. Adam experienced a substantial waiting period and then suddenly was rushed to depart once all the approvals were obtained:

There was a lot of doubt about whether the assignment was going through. I was told that it was going to go through, but it had to go through a lot of approvals. It had to go through international [human resources]. I can’t remember how many signatures. I never saw how many signatures—quite a few, but certainly more

than 10. I don't think there was anything in that process, making it go forward. I had to contact people to find out where it was, to really monitor it all the way through. When it did go through, I was told to jump. "OK, you got to go right now! We want you there immediately!" We were happy to be able to go, but there was a lot of uncertainty and waiting, for months, and then a really rushed departure. I think that was the same for the other expats on the assignment too.

Table 4

Participants' Experiences during the Preparation Phase

	n
Notice Given before Assignment Began	
2 weeks	3
1-2 months	5
3-6 months	3
Cultural Training Provided	
None provided	4
Specific resource provided	4
Limited training and support provided	6
Limited reimbursement provided for training	4
Other Preparation	
Logistical preparation and support	7
Physical and Psychological evaluation	5
Arranging work and travel documents	4
None	1

N = 11

Participants received varying amounts of cultural training; however, no one reported receiving more than limited support. Moreover, four participants reported receiving no preparation. Mary shared that the urgent business need overrode any intentions for cultural preparation. These four individuals who received no preparation reported having to learn on the job through word of mouth. Adam described his experience, adding that far more preparation is needed:

I did not receive that at all before going to Italy. I got it in Italy, but a week before I was ending the assignment. I thought that was a shame. A lot of the things they told us I figured out 6 months into the assignment. Really nothing [as far as assessments go]. I think that the company could do a little bit better job with trying to train people in the language of where they're going to be going, and possibly more than just a day of cultural training. For example, I know that the people who work for Japanese companies are assigned for 5 years. They're given

very thorough language training before they go. They're expected to be almost fluent in the language. It really helps them assimilate into that business culture a lot faster.

Four participants reported receiving a specific resource for cultural preparation, such as a website, handbook, or packet. Tyler stated that the company website as well as an external website "that talks about the [cultural] differences" were helpful. Penny added, "There was an organization to support the move process. Upon my first conversation with them, they showed me some websites and there was a ripple effect of things to read regarding the culture, different cultures." Mark stated, "They gave us a relocation handbook," while John shared, "I had a little packet that someone had put together going to Italy, and things to expect."

Six participants commented that the training and support provided was limited. Several of these participants explained that the training involved a series of "casual conversations" with medical, psychological, or other business professionals about culture and other aspects of expatriate assignments. Brandon described his experience and dissatisfaction with the limited training he received:

I wanted to learn a new language. There was a cultural training aspect of this. They offered a cultural awareness training and language classes in country. I took advantage of both. The cultural awareness was worthless. I was excited. I thought I was going to learn about Japanese culture: what to do and what not to. The person who shows up is the lady that is from Chicago that came into the hotel that sat down with me for 10 hours to train me on Japan, and she's only been in Japan a year. She was here teaching Japanese people about American culture. I got nothing from her. It was a waste of time.

In contrast, Doug found the preparation beneficial. He explained,

[It was] pretty good [preparation]. We were taking notes and listening to the advice of the person we were talking to. Took advice about home. They gave a bit about cultural differences between Italy and the US, and that was helpful. Helps you get ready. It was helpful. In general you have to be open-minded to do an assignment like this, and be ready to adjust. They talk about being in the right mindset and give tips about making the cultural adjustment. That was really good.

Four participants also stated that they received limited reimbursement provided for language training, although the participants might have had to request it. Penny explained, “I was authorized to get a Rosetta Stone to start learning the language, but I had to call and get that information. It wasn’t freely handed out, or [given] in a timely manner.”

Most participants also described other types of preparation in which they engaged. Seven participants described logistical preparation and support, including house hunting trips or working with the logistics company supporting expatriation. Adam shared, “For both of those long-term assignments, we were able to have a house hunting trip beforehand, which I thought was valuable.” Doug elaborated on how such a trip could be beneficial:

We came on a house hunting trip in January 2011. That was really good. My wife didn’t know what kind of house we were getting into. We got to see the schools. We looked into shopping, grocery, clothes. Real good to take in and get exposure on what to expect so it wasn’t a complete surprise or mystery. That was really helpful.

Jeremy described the support he received from the logistics company supporting expatriation:

I contacted [the company’s logistics company supporting expatriation]. They provided a 2-hour orientation session, a checklist, and a handbook of information to read through depending on your situation (e.g., whether you have children and so on). They took you through that whole process. It was really good. Income tax financial orientation with a third party organization that [the company] established. My favorite activities were around physical relocation. Looking at places where I might live. Making sure I was given contacts when I arrived to help me with the first few days when I arrived in Italy.

Five participants added that they had to undergo physical and psychological evaluations. Beth explained, “they did have us meet with a mental health practitioner. She

interviews you about your ability to handle the move. That was one of the best things they provided, that one-to-one with the counselor.” Jeremy elaborated,

As soon as I had accepted the offer, there was a series of activities that I needed to do prior to departure. Up front, it was about making sure I had my physical health and finances squared away. Medical—I had to ensure I was medically in good shape with no issues. Prior to departure, they also did what was called a psychological evaluation, to understand that you were about to go become an expat[riate], an immigrant into another country. Depending on the country, there might be issues—religious, political changes—to be aware of, and to make sure people had the aptitude for it.

Four participants described the process of arranging their work and travel documents. Michelle shared, “Most of the time was spent about getting people work visas.” Doug elaborated, “There was a lot of paperwork. There was the work authorization, getting the work visa started to be able to work and live in Italy, European Union. I had to make sure everyone in the family had passports.”

In summary, participants received varying degrees of notice before the assignment began, with some having as little as 2 weeks to prepare and others having as much as 6 months to prepare for assignment. Participants received different amounts of cultural training, although no one reported receiving more than “limited support.” Other forms of preparation included logistical preparation and support, physical and psychological evaluation, and arranging work and travel documents.

Arrival and adaptation. Participants also described their experiences and their family members’ experiences related to arriving in the assignment country and adapting to that country (see Table 5).

Table 5

Participants' Initial Personal Experiences upon Arrival

	n
Participants' Experiences	
Initial arrival	
Disorienting and difficult initially	4
Immediately found bearings	2
No response	5
Support from others	
Received help from others	5
More support was needed	3
Desired or sought to avoid isolation	2
No response	2
Family Members' Experiences ^a	
No difficulty/smooth transition	5
Challenged by certain differences	4

$N = 11$; ^aSeven participants reported being accompanied by their spouse and/or children; however, one of these participants completed three assignments and reported his experiences with each assignment

Regarding their initial arrival, four participants shared that it was disorienting and difficult initially. John shared his experience:

We flew into Rome. My experience, when I went on the first trip, I left on a day and a half notice. My boss asked me where I was going and I said "I don't know. I haven't looked it up yet but I have the name of the town."

"What is the town?"

"The town is -----"

"Do they have a car set up for you?"

"Unknown."

"Do they have a hotel set up for you?"

"Unknown."

"What are you going to do if nothing is set up?"

I said, "I have a [company] credit card and I do have the capacity to drink great wine."

Brandon expressed a similar experience:

I was on my own. No communication whatsoever. I had to get through transferring airports, get to the hotel, get to the assignment location. It was frustrating. No personal side of it. It was very frightening. If you can make it through this, it builds character and self-confidence.

In contrast, two participants shared that they immediately found their bearings.

Tyler shared,

I landed off a 12-hour flight and jumped a train, scared to death of what I was walking into. I had packed granola bars into my luggage. I thought I might not like the food. You arrive in downtown Nagoya [Japan] and it's bigger than Manhattan and there's more stuff than Manhattan. Sweet! It was very comfortable. Most of the signs are in Japanese and English. Most everyone knows enough English to keep you out of trouble. I initially had a full-time translator, but I eventually decided I didn't need her. She was taking my message, which was direct, and the culture there is very respectful and she would water down what my comments were. I found that it was OK for me to be clumsy and get a more direct point across rather than her water down what I was saying.

Participants also described the support they received or wish they had received from others. Five participants shared that they received help from coworkers, managers, and local residents. Beth's help came from coworkers. She explained, "I was fortunate that I had two coworkers that I didn't know previously but had been on site for about a month already. They showed me the ropes a bit." Mark met with a local residents who helped ease their transition:

We met with a local gal to help get my son a tutor for school. [The company] employees helped us. Local Italians are very helpful with that kind of thing. Great moving company: The moving companies did a fantastic job. The logistics of getting things there, they did a good job.

Three participants expressed that they needed more support during their arrival. Mary described the multiple points during her travel, orientation to the work site, and setting her family up in the new location when she needed more help:

When departing to and entering a Middle Eastern country, there are double security checks. I was on my own clearing security. It would have been helpful to have some up front information about passports (some countries screen for other countries' stamps in your pages and you have to get a new one). I arrived on their day off and no one there was in a hurry to get there. I sat in the security office most of the first day because they weren't ready. Once I got to the work site, it would have been good to have an assigned person to walk me through or to tour the facility. . . . I also brought two small children and my husband. I was on my own to find a daycare or preschool.

Two participants described the importance of avoiding isolation by choosing to live near other English speakers.

The participants also described their family members' experiences. Five participants shared that their families had a smooth transition and experienced no particular difficulties. Several of these participants explained that because they went on assignment before their families arrived, they were able to pave the way. John elaborated,

After going there the second time, I left a month before my family and went over there. I wanted to find an area, I wanted to visit the town where my kids would go to school, and wanted to look at other areas for possible living. Because I had been there I knew my way around, I knew how to get things, I could speak enough to get what I wanted. My family flew in a month later. I picked my family up in Rome. By then we had it dialed in regarding the time change, and so they had a really good transition over there.

In other cases, the family members simply experienced a rather easy adjustment.

Tyler described his wife's experience: "It wasn't what she was expected, and it was pleasant. She took salsa lessons, flower arranging lessons. She met a lot of expats. She was pleased with the opportunity in Japan."

In contrast, three participants shared that they family members were challenged by certain differences. Mary shared the challenges she faced in finding appropriate childcare:

It was very difficult because the school couldn't put them on a waitlist if I couldn't guarantee I'd be there more than a year. The international school was full and our company wouldn't help since there was no room. I opted to have a nanny come over and worked it out that way.

Adam shared that issues such as pollution in China and racism in Italy posed challenges for his family:

The arrival for my spouse [in China] was shocking because of the pollution in the air here. You hear about China being polluted but you don't see how until you get here. . . . I will say that on the previous assignment [in Italy], it was difficult sometimes because my wife is Japanese. Living in southern Italy, there is a lot of

racism towards Asians. . . . Not often, but somewhat frequently, people would yell at her or give her dirty looks. I would be walking with my children, who also look Asian, and people would give us strange looks. People would ask what I was doing with these Chinese kids. Things like that made it more uncomfortable. Living here, I'm Caucasian, but my family looks more East Asian. It hasn't been as big a deal. I'm more comfortable with standing out in a crowd, because I've lived quite a bit of my life overseas.

Participants were asked to compare the national culture in their home countries to that of their assignment countries (see Table 6). Analysis of participants' responses pointed to key differences related to social order and daily living, prompting them to make a number of adjustments in their daily living. *Social order*, which refers to “the manner in which a society is organized and the rules and standards required to maintain that organization” (“Social Order,” 2009, para. 1).

Table 6

National Culture: Comparing Home to Assignment Locations

	n
Social Order	
Road rules	4
Infrastructure	4
Daily Living	
Time and availability of conveniences	4
Social norms	4
Language barrier	2
Commute	2

N = 11; Some participants reported multiple subthemes within each theme

Regarding social order, four participants each pointed out the rules of the road and the infrastructure were different in their assignment location. Beth shared, “The streets, the traffic rules are very different. It was my first experience driving in another country, so that was a little rattling initially. Honking and blaring.” John elaborated,

Not understanding some of the laws, especially with traffic. In the US, a stop sign is a stop sign. In Italy, it is a suggestion. A run-down of the rules and laws of Italy would be helpful. Driving on the autostrade—it's an implied speed limit, but there are cameras there. You will get tickets. They will be mailed to you.

Tyler shared that the infrastructure in Japan was better and cleaner than in the US:

My wife and I love the Japanese culture. There's a lot of great aspects to it being a Westerner showing up there. Japan has a fascination with Americana. They have a homogenous society. They don't have crime or vandalism by our standards, because of the homogeneous society. Nothing to fight about. It's a relatively small country. We loved the order of the country. It is capitalistic: great shopping and restaurants. Very clean, very safe. That's looking at it from us visiting. I don't know if I'd want to be Japanese and live there. . . . It was very comfortable and we loved it, but there were issues that we struggled with.

Participants in other locations expressed the infrastructure in their assignment country was not as developed as in the US. Beth shared, for example, "Southern Italy has a little bit of a third-world country feeling. It is pretty chaotic there."

Participants also described several features of daily living that differed from their US lifestyles, such as time orientation and the availability of conveniences (n = 4). Mary described the differences related to time:

The work schedule is different: the work week is Sunday through Thursday. Saturday is off and the company is shut down. Most businesses are closed on Saturday. If people do come in on Friday, they close the office and factory by noon.

Penny shared her experiences related to the availability of food and conveniences:

We in the US we are so used to fast, fast, fast, I want it now, now. In Italy, that is not occurring. That's been one of my biggest eye-openers. An example would be food. We in the US have things available 24/7. In Italy, you don't. If you don't eat at lunchtime, you don't eat lunch. If you don't make dinnertime, you don't eat dinner. Stores and restaurants are not open during certain windows. You can't get something all the time.

Four participants shared that the social norms on their overseas assignment differed from those in the US. Tyler explained how the homogeneity in Japanese culture led to less acceptance of diversity: "people that look different are not treated that well. There's a huge bullying problem within schools. Kids born with Down Syndrome or

defects tend to get alienated. High suicide rate in Japan.” Mary pointed out differences concerning drinking at work and security consciousness:

Drinking is acceptable for celebrations at work, and is frowned upon if you don't drink. The security was a big cultural thing. Bomb drills and evacuation. Took twice as long to get through security to come into the country. Stayed at a hotel that was gated and very security conscious.

Two additional themes, each mentioned by two participants were the language barrier and the commute. In summary, when asked to describe the differences between their national cultures and their assignment countries, participants noted differences related to social order (e.g., road rules, infrastructure) and daily living (e.g., time orientation and availability of conveniences, social norms, language barriers, and commute times).

The various differences participants encountered in their assignment location prompted the participants to adapt to their host cultures, including shifting their day-to-day lifestyle (n = 6), adjusting their daily schedule (n = 5), adapting to social norms (n = 3), being open and taking time to adjust (n = 2), and learning the language (n = 2). Table 7 presents these results.

Table 7

Adaptations to National Culture during Expatriate Assignment

Adjustments Needed	n
Shifted day-to-day lifestyle	6
Banking (3)	
Shopping (3)	
Way of life (3)	
Staying in touch with friends and family (3)	
Housing (1)	
Adjusted schedule	5
Adapted to social norms	3
Expected to be open and needed time to adjust	2
Learned the language	2
Got used to the climate	1

N = 11; Some participants reported multiple subthemes within each theme

Regarding shifts in their day-to-day lifestyle, participants described changes in their housing as well as how they conducted their banking, shopping, basic living, and communication with friends and family. Tyler shared, “We would have to adjust to how to pay the water bill, pick up mail, get our cell phone. All those things are different from the US.” Jeremy added that credit cards were not as widely used in southern Italy

Banking is a big shift for us. How we would take the paycheck I would receive so that I could use it here. They don’t always use credit cards in Southern Italy for all things. You have to operate in cash.

Regarding shopping, Mark shared, “You get used to not getting all the products you are used to in the US.” Jeremy echoed,

Biggest shift we did is things you take for granted like food. Where do I get laundry soap? You’re resetting your whole experience again. Brand product recognition. What is this item? Today we experimented with a bag in a vending machine. We bought it from the machine without knowing what it was. That experience happens every day. Packaging. You’re not sure if it’s a can of soup or a can of dog food.

Mary and her family experienced substantial differences in basic living. She explained, “In some areas, you can’t use electricity, drive cars, or other things. The hotel had no hot food items on Saturday, so we had to prepare.” Beth shared that staying in touch with friends and family was even more challenging on assignment and that this challenge had a long-lasting impact on her relationships. She elaborated,

Since I was single back home, I was used to being alone. But I definitely missed friendships and family and having to figure out how to adjust and still stay in contact with them. Definitely lost some of the strength of those relationships because it is hard to stay in touch in different time zones and you can’t see each other.

Five participants described adjusting their schedule to the local national culture. Several participants described challenges with shifted work hours and balancing meal times with restaurant operating hours. Penny described her challenges:

The one thing that is still the hardest to get used to is meal times. I'm still in a hotel. I can't just go home and cook dinner at 6:00. Restaurants don't open until 7:30 or 8:00 at night. You get out of a restaurant around 10:00 or 11:00. Trying to plan your life and get sleep. The adjustment is you are eating, sleeping, working. That's an interesting piece. I knew I would be working long hours but because I was not aware of the cultural shut down of stuff, that's the hardest piece. After work you just want to go wander the town and look at shops, but they may or may not be open depending on the time. It's the whole fast food culture that we're used to in America. We have to relax a little bit!

Three participants described shifts related to social norms related to being more family-centered, having gender stereotypes, and having everyone in town know what they were doing. Mark explained, "You get used to everyone in town knowing who you are. You're not in Kansas anymore." Michelle added,

You're always being analyzed or watched. People told me if they saw me in town, even by management, the vice president of the site. That would never happen in the US. I found that there was a lot of assumptions about American women being promiscuous. Dealing with that was interesting.

In general, Brandon found it was important to be open and take time to adjust:

I didn't have to make any major adjustments. The only thing was patience: This is Japan. It is a different country. What you would expect to have in the US, don't expect it here. You can't get mad or angry or frustrated. It's Japan, a different country. You have to adapt: Be open to different experiences, foods, techniques, mannerisms and everything.

Other challenges participants described were adjusting to the language and adapting to a hot and humid climate. In summary, the various differences participants encountered in the national cultures of their assignment location prompted the participants to adapt to their host cultures, including shifting their day-to-day lifestyle, adjusting their daily schedule, adapting to social norms, being open and taking time to adjust, and learning the language.

Next, participants were asked to compare their US work environments to the work environments on assignment. That is, although they already had identified the differences

in the *national* cultures, this section asked them to describe any differences in the *work* cultures. A large number of themes emerged (see Table 8). These related to differences in (a) the social order (n = 11); (b) organizational behavior (n = 10), which refers to the characteristic ways organization members operate (Schein, 1984); (c) connection to the workplace (n = 7); (d) physical environment (n = 6), (e) strategy and leadership (n = 3); and (d) their work position (n = 3)., Three participants also noted there was little change in the physical setup of the factory environment.

Table 8

Work Culture: Comparing Home to Assignment Locations

	n
Social order Focus on family, relationships, group (6) Hierarchy and power distance (5) Gender roles (4)	11
Organizational behavior Communication and decision making styles (7) Slower pace (7) Less structured (5)	10
Connection to the workplace Friendly local coworkers (4) Work with people with varying levels of English fluency (2) Camaraderie among fellow English speakers (1) High stress (1)	7
Physical Environment Fewer resources and poorer infrastructure (3) Different than expected (1) Factories are the same around the world [no change observed] (3)	6
Strategy and Leadership Lack of strategic direction (3) Intercompany relations affect day-to-day relationships (1)	3
Position Had variation in role (2) More job scope and responsibility than in US (1)	3

N = 11; Some participants reported multiple subthemes within each theme

Regarding differences in the social order within the workplace, which was noted by all participants, six specifically commented on the focus on family, relationships, and the group in their assignment country. Doug explained,

It's quite a bit different. They have a different way of living life. They work to live and we live to work. They're not so concerned about careers or work. They're more focused on family and time away from work. That's evident in every part of what we do here. You have to be aware of that. It's all about connections. People in the local community where you do shopping you're on a first name basis after you've been to the shop a few times. They want to have a relationship with you. It's first name basis.

Beth added,

Some of the obvious ones are they are very relationship-based. They want to have a relationship before they start working on activities. For them they want to have that relationship and for it to be good before they work with you. They want trust. They want to have coffee before work and chat with everyone for a while.

Five participants pointed out that concepts of hierarchy and power distance were different in the assignment location. Brandon and Adam, who completed assignments in Asian cultures, commented:

There are differences in greeting people. If you respect their honor and their history and their culture, they respect you back. Trust and respect. Go into a situation with respect and trust. It stands every culture. (Brandon)

Work-wise, it's a lot more hierarchical. . . . Another thing in China is hierarchy. There's no such thing as a casual meeting. It's always formal. The Chinese people sit on one side of the table and the people [from our company] sit on the others. If you try to make it informal they won't know how to make it informal. The most senior speaks first. It's a more formal atmosphere. It's probably difficult for them to comprehend how we can be formal and yet also informal in business. (Adam)

Mary, who completed an assignment in Israel, and Michelle and Mark, who completed assignments in Italy, commented on lack of knowledge sharing up, down, and across throughout the organization. For example, Mark shared, "Their business culture is different. More silos. Direction comes down from the top and then they won't break stride with that."

Four participants commented on the strong gender roles that were observed in their assignment workplace. Tyler shared, “From my Western view, family life is quite different. Men tend to work, women tend to take care of house and kids. For me, the family stuff structure seems to be a bit more rigid to my liking.” Michelle added, “Another cultural one was sexism. Very interesting situation to deal with, because there’s no human resources department to deal with that.”

Ten participants described differences in organizational behavior. Seven explained that communication and decision making styles differed from the US. Brandon explained that in Japan,

Things are based on consensus. In a Western culture, you meet in order to get a resolution. In Japan, there will be high level leaders in there and they hardly asked questions because it is more or less just a transfer of information. Japanese businessmen teach me stuff on the side such as not directly asking someone a question in a meeting. They’re not going to give you the answer. You learn that when they say “Yes,” it doesn’t mean that they’re agreeing. It means that they heard you. You have to speak a certain way. Don’t throw big words. Speak clearly and enunciate your words so that those who speak English understand what you’re saying. When you walk between meeting rooms or to get coffee, that’s where the discussion and agreement will happen.

John provided another example of communication differences in describing the work environment in Italy as much more animated:

The work environment [in Italy], as I explained to a bunch of other people, is like going to a never-ending bar fight. You just step in and start swinging. You were there during those times. You know what I mean. It was really tough. I enjoyed it very much. It took a while to get them headed on the right direction, but very challenging, very rewarding.

Mary described similar communication and decision making practices in Israel:

“Conversations can be loud and sound like yelling or arguing, and the next minute; this is the decision.”

Seven people shared that the work environment operated at a slower pace. Penny explained, “The culture in Italy is more laid back, relaxed, slow, take your time [compared to the US]” Mary similarly shared, “There is a laidback style; there is no sense of urgency.”

Five people expressed that their assignment work environments were less structured. Michelle shared, “There was a feeling that planning was not their strong suit. They operated by the seat of their pants.” Adam shared his perspective from multiple assignments:

One of the big things that I’ve found in both assignments, is when we send out a meeting notice and it is accepted, we expect it that the meeting will be kept, whereas here [in China] and in Italy, there’s really no concept of a standing meeting. People would be really surprised that this meeting is happening, yet again, on the third or fourth week. You’re constantly reminding them that this meeting is every week. . . . They’re just not used to following through with meetings. They don’t have Outlook calendars, or any digital reminders. Everything is kept in their paper and pencil notepad. Everything seems to be much more reactionary. If the big boss calls a meeting now, you go, no matter what else you’re doing.

Seven participants also commented that the nature of connections at work was different from the US. Four individuals comments that their coworkers on assignment were very friendly. Beth explained,

The actual work site that I was at, there were a lot of younger Italians there. That was nice. It was easier to create relationships with them. They also had a limited amount of English, so it was a fun relationship with a lot of the younger Italians. The site manager was very welcoming and accepting of us as well. We were fortunate to have that. We did have a very small [company] presence in the work statement that I was on. It was a bit more isolated in terms of working with coworkers from back home.

Other comments about the social environment were that they worked with people with varying levels of English fluency (n = 2), natural camaraderie among fellow English speakers (n = 1), and high stress in the environment (n = 1).

Three participants commented on differences in the strategy and leadership. Mark commented, “One of the things that has really opened my eyes is that we want to be a global company but we don’t have a strategy or sense of how we want to do that.” Three participants commented on differences in the physical environment, including fewer resources and poorer infrastructure. Adam explained,

There’s a lot less conveniences like finding printers or scanners or faxes. There’s a lot less office supplies. You have to scrounge around and find things. I think the tech support is actually very good (local tech support). It was also very good in Italy on assignment. When I first got to my assignment, office supplies were also hard to find in Italy. That changed when a lot more people came over and we had a bigger budget. All of our faxes printers and scanners and IT support were there, and working well.

Another three participants noted differences in their work position, such as increased variation and more job scope and responsibility. Jeremy explained,

I’m not doing the same activities I would do in the States. Normally in US, I would do workshops. Here it is watching them do that process and helping them out. . . . Day to day, most of my time is spent communicating with Americans who need something from here, and sometimes the opposite, an Italian needing something from [the company] in the US. Once I understand what they’re looking for, I help them get what they need. Try to make sure people on both sides have a correct understanding of what’s going on. . . . In some cases we’re introducing new concepts, or reintroducing a concept that both sides already know, like set up production for example, and making sure everyone has the same definition and looks at it in the same way.

Importantly, three participants noted that there was little change in the physical environment, explaining that factories are the same around the world. Doug explained,

The location is unique but once you’re in the factory it’s really just another factory. You have to speak another language but it’s really all the same. No matter where you go in the world it’s the same work groups and problems and opportunities and bureaucracy and all that stuff.

Despite the many differences participants described in their work environments, few participants shared making any adaptations to adjust to the environment (see Table 9). The adjustments that were made included navigating the different organizational

environments, figuring out new behaviors to accomplish tasks, and meeting 24-hour demands.

Table 9

Adaptations to Work Culture during Expatriate Assignment

Adjustment Made to Work Environment	n
Navigated the different organizational environment	2
Figured out new behaviors to accomplish tasks	1
Met 24-hour demands of home and expatriate assignment	1

N = 11; Some participants reported multiple themes

Two participants shared that they learned to navigate the different organizational environment. Michelle shared,

I walked away from them several times. I trained them through cause and effect. That was passive. I'm usually more assertive or direct. I found it to burn less bridges. . . . Emails—don't send after-action emails. Figure out how to get follow through on action items. Very challenging. The approaches I take didn't work. Trial and error. It damaged some relationships. After a time, most of it was resolved due to my commitment and their support, but it didn't help or make life easier, as you keep running into walls.

Other adaptations included figuring out new behaviors to accomplish tasks (*n* = 1) and having to meet the 24-hour demands of home and expatriate assignments (*n* = 1).

In summary, participants shared that they and their family members had varying success and ease in adapting to the experience. Several reported receiving and/or seeking help from others. When asked to describe the national culture in their home countries to that of their assignment countries, participants pointed out key differences related to social order and daily living. These differences prompted the participants to adapt to their host cultures, including shifting their day-to-day lifestyle, adjusting their daily schedule, adapting to social norms, being open and taking time to adjust, and learning the language. When asked to compare their US work environments to their assignment work environments, participants identified differences in the social order, organizational

behavior, connection to the workplace, physical environment, strategy and leadership, and their work position. Despite these differences, few participants shared making any adaptations to adjust to the environment.

Repatriation. Following discussion of their selection, preparation, and arrival and adaptation to the assignment country, participants were asked to describe their repatriation experiences (see Table 10). Participants' responses discussed the abrupt shift to the end of their assignment, their adjustment back to the US, and their next position.

Table 10

Participants' Repatriation Experiences

Theme	n
Abrupt shift	4
Unexpected end to expat assignment (3)	
No transition or decompression time (3)	
No repatriation support (1)	
Adjustment back to US	
Smooth personal transition	4
Adjustment back to US needed	3
Position	
Uncertain career path	5
Next position planned in advance	3
Got a different role in a different business	2

N = 11; Some participants reported multiple subthemes within each theme

Four participants shared that their assignments came to an abrupt end. Specifically, they remarked that the end was unexpected (*n* = 3), did not allow for transition or decompression time (*n* = 2), and that they received no support for this phase (*n* = 1). Adam, Michelle, and Mary all had received mixed messages that they would be continuing for another year and then suddenly learned that they were returning to the US with little notice. Mary shared her experience:

A manager wanted me to extend for a year and couldn't get the paperwork together. I applied for and accepted a different job, in a different group, so it was easier for me. I was on a home leave [in the US] and was supposed to return to

[Israel to] close out some things and pack up, but the home organization made a different decision and I couldn't go back. Frustrating, because the replacement didn't come in for 5 months. There was an uncertainty with the end of my assignment and I wasn't allowed to make the final trip back to pack my things. I had to do it over the phone with someone on our team there. Inconsistent information and processes. Most people on assignment in Israel didn't have jobs to go back to. [It would have worked better to reduce confusion around extensions. Instead, it was] "Hurry up and wait," then "Hurry up and pack." Some people had paid time to go home and pack, some did not.

Beth, Mary, and Michelle additionally stated that upon returning to the US, they had to immediately transition, with no debriefing, knowledge sharing, or reflection on their experience. Michelle described her return:

It was as though I'd never left. My director who had sent me never came up and said "Hello, thanks, welcome back." Never debriefed with me. Never communicated with me some of the results or reasons that we were not extended. I passed him in the hall and he said "Hi," like I'd never been away. I had talked to him on the phone. It was disheartening. There was a feeling—while over there, and while back—of abandonment. There was an expectation that they would be there to support and help and provide, and make us successful, but the follow through was not satisfactory. Upon my return, I just had to get back to work. I landed Tuesday, and I was on a plane to Korea [as part of another project] on Friday. After being away for 2 years. My boss wanted me on Thursday. I told my boss "That's insane." We negotiated the Friday [start date]. I don't expect accolades or praise; I just wanted to be acknowledged for the challenges and work I'd done.

In terms of their personal adjustment back to the US, four participants reported having a smooth personal transition, while three participants shared that they needed to adjust back to the US culture. John described the smooth transition his family experienced: "For my kids, it was a win-win. When they went there, they were rock stars because they the American kids. When they came home, they were rock stars because they were the kids that had lived in Italy." Beth added, "They always tell you [repatriation is] harder. It wasn't true. It felt very easy to feel back in the groove of things. You know where restaurants are and how traffic lights work and people follow the rules."

At the same time, both Beth and John described the transition they experienced readjusting to the US culture. Beth explained, “It felt very disorienting to go back to work. The work culture that was there felt a bit isolating.” John echoed,

I was sad when I came back. . . . [In Italy] you became intertwined with people’s lives and what was going on with them. Also, with the neighborhood I lived in, the people, my neighbors, are a very social group. Then you come back here and you feel kind of alienated. I have a house, but I always say to people who live in apartments, that they live in the most congested area but it’s the loneliest area. People in apartments don’t talk to each other. Obviously, the culture is different. Same for my wife. . . . When she was there [in Italy] she did things in groups. Coming back it was that let-down, that loneliness.

In terms of the positions they returned to, three participants shared they experienced an uncertain career path. John explained that going on an expatriate assignment means agreeing to uncertain job security:

What kind of confused me is that I had to sign a piece of paper that [the company] wasn’t guaranteeing me a position when I came back. I’ll never forget that. I was sitting there signing that I understood it and my wife was surprised. I said, “But [the company] doesn’t guarantee me a job tomorrow.” I’m not in the union. I’m based on my performance.

Michelle explained how this lack of job security can deter talented people from taking expatriate assignments:

You’ll lose a lot of good talent from people who are risk averse if they don’t know if they have a job to come back to. Some of the best people are risk averse. You need to as a program compensate or remove the barriers from keeping your best people from going.

Three participants stated that they had planned their next position before they even left their expatriate assignment. Adam elaborated,

There was always the expectation that I would be going back to my former group. There was a place for me there. It worked out that I joined the group that was supporting China, before I even left Italy. I had already called into a couple of conference calls. That transition was very smooth. I have heard that was the exception.

Two participants shared that they got a different role in a different business. In summary, participants' repatriation experiences centered on the abrupt shift to the end of their assignment, their adjustment back to the US, and their next position.

Participants described professional benefits (n = 9) and personal benefits (n = 3) resulting from their expatriate assignments (see Table 11). Additionally, two participants believed the impact was deleterious for their careers and two were uncertain of the impact.

Table 11

Perceived Impacts of the Expatriate Assignment

Impact	n
Professional benefits	9
Developed professional skills, traits, and experience (6)	
Expanded my perspective and experience (3)	
Strong professional relationships (2)	
Aided career advancement (2)	
Earned respect from management and peers (1)	
Personal benefits	3
Stronger personal relationships (3)	
Self-awareness (1)	
Deleterious for career	2
Uncertain impact—to be determined	2

N = 11; Some participants reported multiple subthemes within each theme

Nine participants named professional benefits such as enhanced professional skills, traits, and experience (n = 6); expanded perspective and experience (n = 3); strong professional relationships (n = 2); career advancement (n = 2); and respect from management and peers (n = 2). In terms of professional skills, traits, and experience, participants described enhancing their networks, developing cross-cultural skills, and encountering and overcoming challenges. Adam described his experience:

I think that this experience has really helped me to work with other cultures. . . . it's given me a really good perspective on my work and working with people of

different cultures. It's also given me stamina for patience I am used to things taking longer, and I go into problems from different angles.

Mark described how the experience enriched his network:

I've met a lot of fantastic people from a lot of organizations. That has enriched me as a person. From a selfish perspective, that creates a network to reach out to for help with a problem, or help for a job going back. Being exposed to people from different organizations and understanding how things work in different parts of the company has been good. Fantastic opportunity. Meeting some top notch people.

Jeremy explained how his expatriate experience expanded his view of his career and of working within the organization:

In my previous job, I was in a senior manager position. In this one, I'm non-manager. It has reinforced the two sides of the technical versus the managerial side of the company. I'm really curious whether or not I'll continue in non-management. I've enjoyed the sense of doing things and accomplishment in the technical side. That's one of the reasons why I came here. I thought, "I could do this well: I can be a manager, and I could be a technical contributor." I've done that and reinforced the fact that there's a chance to further your career on both sides of the coin, technical or managerial. The page is still unwritten in terms of the success of my career. I definitely have a broader thought process on the next job. As long as I'm enjoying it and it's a challenge, it's right for me. Before I only thought that managerial positions were the way to advance my career.

Participants also named personal benefits they experienced as a result of their expatriate assignments, including stronger personal relationships (n = 3) and self-awareness (n = 1). John shared,

If you can befriend the people there, they are friends for life. Befriend them so that they trust you, that you weren't there to take their jobs but to help them be better at what they are doing. What I tried to do was try to understand their problems, effectively remove roadblocks for them, and try to push continuous reliable repeatable process. Explaining our process, the way [the company] does it.

Despite these many benefits, two participants believed the expatriate assignment was deleterious for their careers. Penny, who is relatively new in her assignment, shared,

I'm hoping it will look good on the resume. Personally, I'm on a development plan, so I was hoping I was going to be able to get some of those skills here. My

gut is telling me after a month of being here that this is not going to look good in my resume. There's no strategic lean manufacturing. I'm scrounging for work. So far, the tiny bits that I've done, they've been impressed with. I think it is crap work. It's not value-added. They think it's amazing. It's ridiculous! I would say if I worked full time in supplier management or administrative program back in [my home location], this could potentially be a job-killer for me. Since I get to walk away and go back to my home organization, I feel like I can still walk back into an area where I am respected and valued for my skill. I'm not sure if that would be the same case here. They don't know what (job role) do out here, so therefore they don't know what I'm doing. It's very odd.

Two additional participants were uncertain of the ultimate impact of the assignment on their careers. Brandon expressed the personal benefits he has experienced, along with his uncertainty about what it will do for his career:

I hope that leaders see that people on long term assignments were committed and getting the job done. I am hoping that it is making me a more attractive employee for the company, a more valuable employee, that leaders and managers will recognize the years of experience of learning the profession and having the commitment to do an international assignment. I'm hoping that it will allow some doors to open. . . . I am hoping that will pay off in the future for other positions in the company.

In summary, participants' descriptions of their repatriation experiences centered on the abrupt shift to the end of their assignment, their adjustment back to the US, and their next position. when participants were asked to describe the impacts of the expatriate assignment, they cited professional and personal benefits, although two participants believed the impact was deleterious for their careers and two were uncertain of the impact.

Participants' Evaluation of the Expatriate Program

The first part of the interviews simply asked participants to describe their experiences. The second part of the interview asked participants to evaluate the company's expatriate program in terms of selection, preparation, and arrival (see Table 12). Participants' responses were mixed for each phase of the program.

Table 12

Participants' Evaluation of Program

Theme	n
Selection	
Worked well	5
Poorly organized and ambiguous	5
Preparation	
Worked well	6
More training and information needed	3
Arrival	
Good benefits and compensation	2
Concerned about abuse of the benefits	1

N = 11; Some participants reported multiple subthemes within each theme

For selection, five participants believed it worked well, while five described it as poorly organized and ambiguous. The five who believed it worked well had experienced a smooth process that required little involvement from them. Doug shared,

It didn't involve me too much. It was more the senior manager submitting the case [I had put together]. He just put me in contact with the the logistics company supporting expatriation people to get the paperwork started.

The five who described the process as poorly organized and ambiguous explained that had received little, no, or mixed communications about the selection criteria, if they were being selected, and when the assignment would begin. This left them in a state of limbo and having to "hurry up and wait." Adam described his experience:

When I was told that I had the assignment, from that point until another 4 months or so, possibly longer, it was just in limbo. We weren't really sure exactly where it was. There were a number of signatures that had to go through. Better transparency would have helped out a lot more. . . . It all took 4 months, or 5 months. There was a lot of doubt about whether the assignment was going through. I was told that it was going to go through, but it had to go through a lot of approvals. It had to go through international human resources. I can't remember how many signatures. I never saw how many signatures. Quite a few, but certainly more than 10. I don't think there was anything in that process, making it go forward. I had to contact people to find out where it was, to really monitor it all the way through. When it did go through, I was told to jump. "OK, you got to go right now! We want you there immediately!" We were happy to be able to go, but there was a lot of uncertainty and waiting, for months, and then a

really rushed departure. I think that was the same for the other expats on the assignment too.

Six participants believed that the preparation phase worked well, explaining that the logistics company supporting expatriation function, in particular was helpful for briefing them and their families about the experience. Mark shared, “They did a good job of listing out all the things we needed for visa prep and things of that nature. All the moving company, packing, all that went well.” Jeremy emphasized that there is only so much that anyone can absorb in advance of the assignment, explaining that much of the learning happens once they reach the assignment country:

Honestly, I thought that the materials that I received up front were good. We had a session once about better preparing people who are arriving, because everyone gets that culture shock. Most people do. I had an opposing view to what a lot of the other folks. Of all the orientation materials I received, I don’t think the company could have prepared me any better, and it would have been a result of me not the company. I tried to describe it as, as much as you can tell me all the things I was about to experience, there would be no way that I would have to assemble that in my mind until I actually experienced it right in front of me. Someone could have told me how difficult it would be to drive from one end to the other in the city of Naples, and I would have listened to a person who did I every day of their lives while I was living in the United States; but I wouldn’t have valued it as much until the day I had to drive through Naples myself. My learning changed the minute I got to Italy. I needed to know how to do these things. Two weeks earlier, I wanted to know how to do these things, but the need wasn’t nearly as great.

Three participants maintained that more training and information was needed in advance of the experience. Penny elaborated,

There was a lot of time I was calling for information rather than being given information. They provided a checklist and it had everything you needed, but it didn’t have a timeframe or a sense of when things would occur. It was confusing. Cultural training, you didn’t know when you would get it. I was authorized to get a Rosetta Stone to start learning the language, but I had to call and get that information. It wasn’t freely handed out, or in a timely manner. That part was interesting. The visa process not efficient. I am in the country without a visa. Nobody told me that I had to go home and get my visa after being here for so many days. I have no home to go to. My house is rented out. I have no bed. I have to go back in 90 days, and I wasn’t expecting that. That kind of stuff.

Few participants evaluated the arrival stage and no one evaluated the repatriation stage when asked explicitly. Two participants shared that the programs offered good benefits and compensation. Tyler explained, “The benefits package is good. Health is good. Emergency card, if any incident happens, they’ll fly you by helicopter to the nearest US hospital. I felt very safe and secure. Good business travel. Very few complaints.” At the same time, Brandon worried about the abuse of such benefits:

People are coming over on short-term assignments, and they’re talking about when they are going on home leave or on vacation. When you are on a long term assignment you get one home leave for every 12 months. You are there working. Some people are there 3 weeks and they are planning a 1-week vacation to go someplace. You think help is coming over there but they are just coming over basically on vacation. Other expats have had the same experience.

Participants’ Suggestions for the Expatriate Program

Participants offered several suggestions for the company’s expatriate program. Regarding the selection phase (see Table 13), two participants advised the company to ensure that candidates with the needed soft, technical, and cultural skills are selected. Adam elaborated,

In the future, I would recommend a little bit more checking of the people who are going to be going out for soft skills as well as technical skills, and choose . . . people that would be good fits culturally for an assignment, not technical just based on their skills. I have seen people who really in some situations did not serve well as diplomats for our country or working well with people from other cultures. They came off as abrasive and closed-minded.

Other suggestions for the selection phase included more transparency about how criteria for selection and how employees were being selected for the assignments (n = 1) and more broadly posting the position (n = 1).

Table 13***Selection Phase Recommendations***

Recommendation	n
Assure that candidates with the needed soft, technical, and cultural skills are selected	2
More transparency	1
Broadly posting the position	1

N = 11; Some participants reported multiple subthemes within each theme

Several recommendations were offered regarding the preparation phase (see Table 14). Participants described training and information needed, needs to involve other people during preparation, and instituting better visa tracking and handling.

Table 14***Preparation Phase Recommendations***

Recommendation	n
Training and Information Needed	7
More cultural training needed (5)	
Language training (3)	
Information about basic safety and how to get around (2)	
Information about dealing with medical needs and emergencies (1)	
More briefing about the upcoming experience (1)	
Involve local workers and previous expatriates in preparing new expatriates	2
Improved Visa tracking and handling needed	2

N = 11; Some participants reported multiple subthemes within each theme

Seven participants believed that more training and information was needed. One particularly frequent suggestion (*n* = 5) was the need for more cultural training, ranging from basic do's and don'ts to accepting and adapting to other cultures. Michelle shared how her lack of cultural awareness affected her work at times:

In Italy, they take coffee. Here [in the US], you're polite and don't yell. Firsthand experience. Dos and don'ts of the culture. They might have sent me a list, but it didn't make sense at the time. Not even sure about that. Minor things would be helpful to know, like how to respond to an offer of coffee, or when someone is late to a meeting. After meeting action notes is rude and aggressive in Italy. I offended a number of people by just doing project management. I was not aware of that.

Mark stressed the need for acceptance of other cultures:

We didn't get anything about Italy, doing business there, We don't respect other cultures. . . . We expect them sometimes for them to act like Americans. We disenfranchise them, and we create a tension that doesn't need to be there. It's like anybody you meet, everybody wants to do a good job. It's empowering them in their culture to do a good job. We trample over that. It's disappointing. When we say things like, "That's just the way Italians do things." Hmm . . . it's not. When it sounds like you're denigrating their culture, it doesn't help. The American way isn't necessarily the only way to do anything.

Other suggestions regarding training and information included language training (n = 3), information about basic safety and how to get around (n = 2), information on how to deal with medical needs and emergencies (n = 1), and simply more briefing on the upcoming experience (n = 1). Additionally, two participants suggested involving local workers and previous expatriates in preparing new expatriates. Mary explained, "Being able to talk to others who had been there would have been good. . . . Being assigned a mentor/partner when you get to the country would have been a big help." Two participants additionally emphasized that improved visa tracking and handling were needed. Penny shared her experience:

We need to improve the international orientation. It needs to be more streamlined. Two months after getting here, I had never heard from the person processing my visa. After being here a few weeks, I kept hearing about people having to go home for their visa but I heard nothing. I sent a note and I got told "Oops, I lost you. I forgot about you." They need a more efficient way to track and process visas, based on arrival date or something. Something needs to trigger it in a better sequence.

Regarding the arrival phase, five participants emphasized that involving others in orienting new expatriates to the new country would be very helpful (see Table 15). Three participants believed that onsite mentors should be used to facilitate expatriates' adjustment. Michelle explained,

It would be helpful to have somebody to show you around the city, like a school buddy, for a day or two. We do that anyway while being abroad, but people are

busy and when it's not their job they might not be an expert. Having someone with focus on doing that would be good. Show the grocery store. The realtor was helpful [on my house hunting trip], but that was a whirlwind.

Table 15

Arrival Phase Recommendations

Recommendation	n
Involve other helpers Onsite mentors to facilitate expatriates' adjustment (3) Discussion with other expatriates (2)	5
Language Training	3
Clarify and communicate expatriate's title, objectives, roles and responsibilities	2
Orientation or welcome packet needed upon arrival	1
Need to provide for family safety	1

N = 11

Tyler similarly shared, "Establishing a mentor network would have helped and put me a bit more at ease with workers. Mentor network for wives, for kids. Where do you send kids to school? Where do you live?" Two participants added that discussion with other expatriates would also help a great deal. Beth reflected,

From a work statement level, it would have been nice to have someone back home on occasion to more formally check in with. Just talk about the experience from a work and personal level. It might be nice to have that structure. The manager we had out here was going through the same thing. It would be nice to have someone back home who has been through expat experiences.

Three participants emphasized the need for language training, due to the lack of interpreters and the lack of English speakers in the assignment location. John summarized, "Speaking the language fluently would have been a lot easier."

Two participants shared it is essential to clarify and communicate the expatriate's title, objectives, roles and responsibilities to the host manager and team. Mary shared her experience:

There were conflicting priorities and goals between the onsite team leadership, regional leader, and the home organization leader. The goals between the onsite,

regional, and home organization were not often aligned. People on assignment should report directly to someone on site and just tie in with home organization.

Other suggestions were to provide an orientation or a welcome packet upon arrival (n = 1) and provide for family safety, such as an air purifier (n = 1).

Participants also offered recommendations for the repatriation phase (see Table 16). Participants described the need for career pathing and debriefing.

Table 16

Repatriation Phase Recommendations

Recommendation	n
Career pathing, known position upon return	4
Debrief to share lessons learned	3

N = 11; Some participants reported multiple themes

Four participants recommended providing expatriates with career pathing, such as having a known position to which to return. John suggested,

If they'd given some insight into maybe . . . if halfway through your assignment, they looked at you and talked about how [the company] stands and the jobs that they foresee in the next 6 to 8 months. Maybe a little bit of outlook on [the company's] part. But, hey, maybe I get released back to the skill team, I fulfill my assignment to the very last day, and then the skill team tells me this is the general area you will be in. My biggest fear was being put into the skill team and being told I was going to an area where I wouldn't learn anything or some stagnant area. It would have been nice if they had given us a forecast, told us where there are opportunities in the next few months, fulfill your assignment, and once you're back in the skill team here are the opportunities that you will possibly be looking at. I believe you create your own opportunities. You would have a lot more people looking at foreign assignments and fulfilling these if there was some confidence level built in coming back.

Mark added, "This is common among all the expats. It feels like you're on an island. No help to repatriate and get a job when you go back."

Three participants explained that it was necessary for expatriates to debrief their experiences and to share the lessons learned. Beth shared,

It would help if managers were more inquisitive about the experience. A debrief would help. The only thing I can think of, when I came back they offered the 6 or 10 counseling appointments, and I did call on one. It was a really good conversation that I had with that person, but it's sort of like the pre-trip. You're kind of in transition, doing a lot of stuff mode, and that happens when you return home. Having that appointment feels like one more thing. It was valuable, when I was done with it. It would be cool to be mandatory rather than optional.

Summary

This chapter reported the results gathered from 11 interviews with current or recent expatriates. The majority of the participants completed an assignment in Italy and did not have language fluency. Most of the participants sought an expatriate assignment for the purpose of career development. Other reasons include wanting to or enjoying living overseas, gaining the adventure of cultural experience, or that it was good timing for the family. All but one of the participants expressed openness to another expatriate assignment with the company.

The participants heard about their assignment in various ways, such as word of mouth, personal initiative, or others telling them about it. They underwent different selection processes, ranging from no process at all to a formal, structured hiring process.

Participants received notice ranging from 2 weeks to 6 months before their assignment began. Participants received little cultural training, if they received any at all. Other preparation included logistical preparation and support, physical and psychological evaluation, and arranging work and travel documents.

Some participants experienced some initial disorientation and difficulty when they arrived on assignment, although others immediately found their bearings. Some participants reported receiving sufficient help from others upon their arrival. However, other participants reporting needing more support to assure a smooth transition. For the

most part, the expatriates' family members had a smooth transition to the assignment country.

When asked to compare their home cultures and their assignment cultures, the participants reported differences in the social order and daily living. In response, they shifted their day-to-day lifestyle and schedule, adjusted to social norms, learned the language, got used to the climate, and expected to be open and needing time to adjust.

When asked to compare the work environments between their home and assignment countries, participants also noted substantial differences in the social order, organizational behavior, social environment, strategic and leadership environment, physical environment, and their position on assignment. Nevertheless, few participants described making adjustments to the new workplace environment.

During repatriation, some participants reported having an abrupt end to their assignment. Some reported a smooth personal transition back to the US, while others reported having to adjust back to the US culture. Participants also had different experiences related to their next position, with some reporting an uncertain career path and others having planned their next position in advance.

Most participants identified professional benefits resulting from their assignment, although two believed it was deleterious for their careers and two added that the full impact was uncertain. Some participants also identified personal benefits they gained from the experience.

Overall, participants were mixed in their evaluation of the company's expatriate program, with some believing it worked well and others pointing out needed improvements. Specific recommendations included providing more training and information throughout the entire process, involving local workers and previous

expatriates throughout the process, better selection procedures, improved visa tracking and handling, career pathing, and post-assignment debriefing. The next chapter provides a discussion of these results.

Chapter 5

Discussion

This study examined the design and impacts of an expatriate program at a large multinational organization. The following research questions were examined:

1. What were the expatriates' experiences?
2. What are the expatriates' evaluations of the program?
3. What are the expatriates' suggestions for the program?

This chapter provides a discussion of the results. Conclusions are presented first, followed by recommendations. Limitations are provided next, followed by suggestions for future research.

Conclusions

Expatriate experiences. Study findings were gathered about participants' experiences during each phase of their expatriate assignment, including selection, preparation, arrival and adaptation, and repatriation. The following sections discuss the findings related to each stage.

Selection. The participants in this study heard about their expatriate assignment in a variety of ways. Some took personal initiative to find them, others found them on an internal job board, and yet others were told about them by managers or coworkers. Most of the participants were selected through an informal process, although others experienced a formal process or none at all. Participants received varying amounts of notice before the assignment began.

The present study's findings contribute to the body of expatriate literature, as little empirical data is currently documented about how people learn about and are selected for these assignments. The implication weaving through these data is employees' personal

initiative, whether that manifests as scouring job postings, actively letting others know of their interest in an assignment, or finding or creating their own opportunities. Human resources departments also play a key role in assuring that qualified, aspiring expatriates are matched with needs in the field, both through monitoring existing expatriates, identifying aspiring expatriates, and providing tools for onsite managers to identify appropriate resources. Specific recommendations for aspiring expatriates and for human resources departments are offered in the Recommendations section of this chapter.

Given the variety of ways expatriates learn about assignments, it follows that onsite managers and teams (those who need expatriates) also need to get the word out in multiple informal and formal ways to reach the individuals who could fill their need. Based on the present study data, it appears that onsite managers and teams often opt to search for people informally due to the time and effort involved in creating formal job postings. However, attention should be given to whether enough suitable candidates are identified through informal processes. Recommendations for addressing this issue are discussed further in Suggestions for Future Research.

Additionally, the present study's findings suggest that expatriates, in reality, may be screened and selected with less rigor than is advised in expatriate literature. Cerimagic (2011) emphasized that the right person—in terms of technical, functional, and cross-cultural knowledge and skills—needs to be selected for the job. Gabel-Shemueli and Dolan (2011) further advised hiring managers to screen for emotional intelligence as a means for predicting success in cross-cultural encounters. Additional screening practices include examining the candidate's suitability in terms of personality characteristics, language abilities, previous international experience, family status, suitability and interest of a significant other, and social networks (Claus et al., 2011). Thus, the present study's

findings provide an important “reality check” for the expatriate literature and calls for a reevaluation of the company’s best practices for expatriate selection.

Preparation. Participants reported receiving little, if any, cultural training. Instead, activities leading up to the expatriate assignment focused on logistical preparation, physical and psychological evaluations, and work and travel documentation. Pre-departure benefits varied, with some individuals having cultural or housing pre-trips and some simply going to start the assignment. The present study’s findings depart from past literature on expatriate training. Wang and Tran (2012) argued that expatriates should receive pre-departure and post-arrival training. Moreover, they asserted that such training should address language, cross-cultural norms, business etiquette, and a preview of what they will experience in the assignment country, among others.

The implication of these findings is that whatever cross-cultural and language skills the expatriate possessed when they were selected for the assignment is most likely all they will have when they start the assignment. Therefore, employees who are interested in completing an expatriate assignment should begin developing their skills and knowledge now, even if that means spending their personal time, money, and effort in doing so.

Despite the need for personal initiative by the employee, employers also have a role to play in preparing the expatriate to succeed on assignment. In particular, home managers can help the employees wrap up their current assignment and discuss whether they will come back after the expatriate assignment. Onsite managers should make contact with the incoming expatriate before the assignment begins and pick an onsite mentor for him or her to work with to help aid the transition. Clarity about the work assignment also will benefit all involved. The logistics company supporting expatriation

also should offer the expatriate a single point of contact to provide a clear process and answer questions related to the many logistical details of an expatriate assignment. Finally, human resources can assist with setting up a stateside mentor program where incoming expatriates may be paired with employees who have already completed an expatriate assignment—ideally, in the same location. These findings align with past literature that stressed the importance of management support, peer support, cooperation, and communication (Lee & Nissen, 2010) and effective performance management for expatriates during their assignments (Claus et al., 2011). Recommendations emerging from these findings are described in detail in the Recommendations section.

Arrival and adaptation. Participants had varying levels of initial difficulty upon arriving on assignment. Although some participants reported receiving help from others, other participants reporting needing more support to assure a smooth transition. For the most part, the expatriates' family members had a smooth transition to the assignment country. Past research on expatriate success has stressed that family members' and spouses' experiences in the country can have a strong influence on the expatriates' success; therefore, it is important to prepare the entire family to succeed cross-culturally in the assignment culture (Dunbar & Katcher, 1990; Mendenhall & Stahl, 2000; Mervosh & McClenahan, 1997; Tung, 1987).

The participants noted differences in social order and daily living when comparing their home to their assignment cultures and needed to make adjustments in their day-to-day living and their schedules, among others. Participants also noted substantial differences in the social order, organizational behavior, social environment, strategic and leadership environment, physical environment, and their position on assignment. Nevertheless, few participants described making adjustments to the new

workplace environment. This lack of adaptation in the work environment departs from other literature that stresses the need for expatriates to adjust “chameleon-like” with the host work culture (Aitken, as cited in Townsend & Cairns, 2003, p. 317). Other researchers have agreed that the essence of intercultural competence is adapting enough to work and interact effectively outside one’s own culture (Farh, Bartol, Shapiro, & Shin, 2010; Hunter, White, & Godbey, 2006). It is possible, although questionable based on participants’ responses, that adaptation was not needed in the work environment because the organizational culture was strong and consistent across national cultures. Therefore, the present study’s findings might simply reflect a limitation in participants’ adaptability, perceived need to adapt, or mere failure to mention that they adapted.

Based on these findings, it is advisable for incoming (or even aspiring) expatriates to familiarize themselves with the business and social cultural environment using online resources such as GlobeSmart or the many published resources available. Onsite managers and teams also should remain cognizant that their new expatriates (and their families) are experiencing a great deal of change and do what they can to ease their transition through orientations, mentoring, and other supportive activities. The logistics company supporting expatriation should strive to ease the expatriates’ transition to the fullest extent possible, such as helping secure visas and providing other relocation services (e.g., house hunting trips). As part of identifying and preparing expatriate “bench strength,” human resource departments also may offer internal courses in working abroad. These various recommendations are described in detail in the Recommendations section of this chapter.

Repatriation. During repatriation, some participants experienced an abrupt end to their assignment and were expected to “hit the ground running” back home. Although

some participants experienced a smooth transition back into their home workplace, others had uncertainty about their career paths. Most participants noted several positive career impacts of their expatriate, most frequently pointing out the professional skills, traits, and experiences they gained. Notably, two participants believed the experience was deleterious for their careers due to the reduced visibility and challenge they experienced. Black, Gregerson, and Mendenhall (1992) similarly noted the challenges repatriating employees face when returning home, such as being suddenly confronted with unexpected changes in the home environment. They have found in their research that returning expatriates' expectations regarding the home, work, and overall organizational environment tend to be inaccurate. Therefore, they advised returning expatriates to actively anticipate, check, and adjust their expectations as needed.

Based on these findings, expatriates going on assignment are advised to negotiate with their home managers so they have a position to which to return. Alternately, they are advised to clearly outline their plans and process for returning to the US following their assignment. Once they do return, they are encouraged to schedule plans for debriefing their experience with their manager, other employees within the organization, and friends and contacts within the community. Home managers and human resources also should keep in mind that the returning expatriate often has just finished a rich life experience that has changed his or her personal and professional lives. Consequently, these US counterparts also play a role in constructing a process for reintegrating returning expatriates, with attention to both aiding their transition and allowing for celebration and debrief of the expatriate's experience. These various suggestions are outlined in the Recommendations section of this chapter.

Expatriate evaluations of the program. Participants were mixed in their evaluation of the company's expatriate program, with some believing it worked well and others pointing out needed improvements. Although the participants did not explicitly offer robust evaluations of each phase of the program, their critiques of the process could be deduced from their descriptions of their experiences (see previous section) and suggestions for the program (see subsequent section).

On balance, the participants explained that their expatriate assignment was a good experience, although many areas could be improved upon to support those on assignment. The support would lead to less stress and enable those on assignment to be more effective in their role. Each major phase has areas that worked well and those that didn't. The areas that did not work well should be addressed by the study organization in order to realize better employee performance. Although there are still gaps to making this a perfect or standard process the majority of participants would go on another assignment.

Further examination of their responses suggest that each stakeholder of the program (expatriate, human resources, home manager, onsite manager and team, the logistics company supporting expatriation) has an important role to play in assuring that (a) suitable personnel are selected for the assignment, (b) the incoming expatriates are adequately prepared for and oriented to the assignment, and (c) returning expatriates are recognized and integrated back into the home environment. When any of these steps are compromised or stakeholders fail to play their role well, the experience leads to less optimal experiences. Similarly, Black et al.'s (1992) framework for facilitating effective repatriation acknowledged the importance of other stakeholders, such as a home country sponsor. Specific recommendations for each of these stakeholders are outlined in the Recommendations section of this chapter.

Expatriates' suggestions for the program. Ample information was gathered about the expatriates' experiences and suggestions related to the program. Many of these have already been discussed in this chapter. Further analysis of these data point to six key suggestions they offered related to the program (these are participant-identified recommendations, compared to recommendations generated by the researcher and discussed in the next section):

1. Pick the right people. Participants emphasized the need to assure that candidates with the required soft, technical, and cultural skills are selected. This can be achieved by broadly posting the position, building a pool of aspiring expatriates, and utilizing effective selection procedures. This recommendation aligns with past research on the importance of selection (Cerimagic, 2011; Claus et al., 2011; Gabel-Shemueli & Dolan, 2011).

2. Take care of the details. Expatriate assignments require attention to myriad details from making personal housing arrangements to arranging the work assignment, to addressing legal and immigration issues. Participants, in particular, stressed the need for improved visa tracking and handling; clarifying and communicating the expatriate's title, objectives, roles and responsibilities; and providing for family safety.

3. Provide adequate training and information. For the expatriates to be ready to go on assignment and make appropriate and effective contributions to the work site, they need to be fully prepared to navigate the new country and work site. Participants pointed out the need for greater transparency in the process and more briefing about the upcoming experience, such as more cultural and language training as well as information about basic safety, how to get around, and how to deal with medical needs and emergencies. Moreover, this information needs to be provided at the right time. That is,

some information is needed before departure, whereas other information needs to be provided (or provided again) in a just-in-time manner, such as through an orientation or welcome package they receive upon their arrival in the country. This suggestion is consistent with Wang and Tran (2012), who emphasized the role of pre-departure and post-arrival training in enhancing expatriates' job performance.

4. Involve knowledgeable others. Participants emphasized the need to involve others who have knowledge or experience relevant to their expatriate experience. For example, they recommended that previous expatriates get involved in the preparation process as mentors and local workers get involved as onsite buddies who provide orientations and assistance in getting their bearings. Other researchers similarly stressed the importance of management support, peer support, cooperation, communication (Lee & Nissen, 2010).

5. Plan for the return. Several participants commented on the lack of career pathing or having a known position upon their return to the US. This caused concern for them that sometimes detracted from the expatriate experience. Notably, two participants thought the experience was deleterious for their careers and two were uncertain of the full impact. These data indicate the importance of placing the expatriate assignment within the context of a larger career path so that it can produce a sense of coherence and direction for the individual. Being aware of the plan for one's return to the US can reduce distress and further aid reintegration, which can have real, measurable benefits for the organization. Black et al.'s (1992) framework similarly outlines the importance of actively recognizing, checking, and adjusting one's assumptions and plans for repatriation.

6. Allow for debriefing and giving back. Several participants expressed the desire to share their experiences once they returned to the US and disappointment that they were expected to simply “hit the ground running” with no reflection time. An expatriate assignment is often a life-changing experience that produces important knowledge and learning that can benefit the individual’s work and home life. Therefore, it makes sense to give them an opportunity bring the fruits of this experience back to the US work site for the benefit of all. Debriefs could occur through one-on-one lunches, presentations, or simply informal conversation. However it occurs, this was identified as an important part of reintegrating to the US workplace.

Recommendations

This section summarizes the recommendations that have been identified throughout this chapter. Recommendations are discussed for the following stakeholders: expatriates, home managers, onsite managers and teams, and human resources and other organizational support functions.

Expatriates. The expatriates themselves perhaps have the most to gain (and lose) from their expatriate assignment. Therefore, it is advisable for them to take ownership for planning and achieving success for themselves in this endeavor. Four specific recommendations are offered related to their selection, preparation, arrival and ongoing experiences, and repatriation.

1. Network and communicate interest. The study data suggested that most of the expatriates found their position through word of mouth or referral by others. Therefore, employees who want to complete expatriate assignments are advised to network and let others know of their interest in completing these assignments. This may be achieved by including it in one’s performance planning, having informal conversations about it,

contacting former expatriates to learn about their experiences and communicate one's own interest, and developing relationships with managers in human resources and business units who are responsible for selecting expatriates. Additionally, it is important to develop a solid reputation for achieving results that would be valuable on an expatriate assignment. Therefore, aspiring expatriates are advised to seek career development opportunities that would create a resume and track record that would be desirable to onsite managers and teams.

2. Educate and prepare oneself. The findings revealed that the expatriates did not have time to develop any technical, cultural, or language skills between the time they were selected and the time they started the assignment. Therefore, aspiring expatriates are advised to begin developing their skills and knowledge as soon as they recognize their interest in an assignment, even if that means spending their personal time, money, and effort to do so. Specific activities could include finding out where the company operates overseas, learning the language, learning about the national culture, learning about doing business there, and understanding what immigration and work-related paperwork, visas, and other documents need to be in place. This information could be obtained through various online resources such as GlobeSmart or The World Bank's (2013) *Doing Business Project*.

Expatriates should expect to encounter differences in their home and work environments on assignment. They are advised to gather ample information about these potential differences and anticipate how they would deal with these. Expatriates also may determine their cross-cultural adaptability through taking assessments such as the Intercultural Development Inventory (Hammer, 2009) and seeking experiences to enhance their intercultural sensitivity and adaptability. For example, cross-cultural

awareness and sensitivity could be built through service (e.g., Habitat for Humanity) or mission trips through civic or religious groups. Aspiring expatriates who have spouses or families also should encourage them to prepare as well.

3. Promote a smooth transition. Leaving one's home country to embark on an expatriate assignment can be challenging, exhilarating, and often stressful. It is critical for expatriates to have compassion for themselves and their families and assure that needed support and assurance are in place upon their arrival. Before they arrive, they could request an orientation to their new city through a relocation service or even through a publicly available tour. They also could request an orientation and a mentor at their work site to ease their transition and help them make sense of, understand, and adapt to the new location. Additionally, it will be important—especially in the case of nonworking spouses and children—to rapidly establish familiar activities and touchstones (e.g., sporting activities, pastimes, church groups) that will help ease them through the inevitable disorientation and bouts of homesickness that accompany this type of change.

4. Plan for your return in advance. Several participants commented on the lack of having a known career path or even next step upon their return to the US. It is important to plan for one's return in advance to avoid unnecessary worry and concern. First, the expatriate is advised to contemplate how their assignment fits within the larger context of their career to give them a sense of coherence and direction for their career. Second, expatriates are advised to negotiate with their home managers so they have a position to which to return or clearly plan their next steps upon their return. Additionally, several participants emphasized the importance of sharing their experiences with others. Therefore, expatriates are advised to arrange opportunities to celebrate and debrief their experiences with their manager, other employees within the organization, and friends and

contacts within the community. This can be achieved through lunches, presentations, or simply parties. The returning expatriate also could seek to mentor other aspiring expatriates as a way to share their experiences and offer others the benefit of their lessons learned.

Home managers. Home managers are perhaps the stakeholders who lose the most and gain the least from expatriate assignments as they “loan” their resources (sometimes their best resources) to another unit for up to 2 years. For this reason, five specific recommendations are for home managers to help them deal with expatriation.

1. Plan for the expatriate’s absence. Home managers often do not get replacement resources for the expatriates when they go on assignment, despite have to meet the same work requirements. As a result, home managers often are reluctant to let these individuals go on assignment. Therefore, when one of their resources is scheduled for an expatriate assignment, it is critical to plan how to handle the absence. This includes understanding the timeframe they will be gone, when and to what extent they will be available, and how the employee’s work statement will be covered.

2. Support their departure. During the preparation phase, the expatriates often are scrambling to prepare for their upcoming assignment while also trying to wrap up their current assignment. At the same time, the home manager is trying to figure out how to deal with their absence. This results in a highly stressful situation for all involved; yet, specific tasks need to be accomplished to promote a healthy relationship and smooth transition expatriation and (later) repatriation. Home managers can promote their own and the expatriate’s success through several activities including (a) asking what support the expatriate needs in wrapping up their current work, (b) identifying someone to help with the work statement in his or her absence and partnering them together for the hand-

off, and (c) initiating a career pathing conversation with the expatriate (what will happen when the employee returns). These activities will help ease stress for all the stakeholders involved and help promote the successful completion of the employee's work statement at home and abroad.

3. Allow for a reasonable response time. Some participants expressed the challenges they faced in working in their expatriate assignment while also supporting their home managers and business units. Home managers should be aware that the expatriate is not working on the same business schedule and is effectively carrying out two jobs. Therefore, home managers should strive for patience and allow the expatriates at least a 24-hour response window.

4. Debrief to identify lessons learned and benefits. As discussed in the previous section, returning expatriates often have a psychological need and desire to share their experiences with others. However, sharing these experiences also can lead to important business benefits, as the expatriate likely has developed knowledge, skill, and experience that could benefit the home manager and business unit. Home managers are advised to ask returning expatriates to give a presentation—either to them alone or to the business unit—regarding the expatriate's experience, key takeaways, and possible benefits and applications relevant to the home organization. This would help galvanize the expatriate's experience, promote learning within the home organization, and likely enhance the return expatriate's loyalty to and satisfaction with the home manager and organization.

Onsite managers and teams. Onsite managers and teams serve as both hosts and primary recipients of the expatriate's knowledge, skill, and experiences during the assignment. Four recommendations are offered based on the study data to help the expatriate's assignment be productive and beneficial for all involved.

1. Select the right individuals. It is not uncommon that an expatriate experience is launched in a crisis, when the onsite needs are both urgent and acute. This emphasizes the need to assure that candidates with the required soft, technical, and cultural skills are selected. Onsite managers are advised to anticipate their upcoming needs in advance to the extent possible and to use all possible informal and formal avenues to broadcast their needs. They also are encouraged to use selection procedures such as resume review, interviewing, business cases, and other assessment to aid in selection.

2. Prepare for the expatriate's success. Onsite teams can play a central role in promoting the expatriate's success as soon as the individual is selected. For example, an onsite mentor could be selected to make contact with the individual in advance to help ease their transition. This mentor could answer the expatriate's questions about preparation, gather information about their lifestyle and pastimes, and assemble suggestions for them to plug into the community. Onsite managers should create and communicate a clear work statement and title for the expatriate.

3. Support their transition. Participants stressed that an onsite orientation immediately upon their arrival in the new country was or would have been very helpful. This orientation could be delivered or arranged by the onsite mentor arranged in advance. This orientation helps the expatriate and his or her family feel comfortable in the country, which will further support the expatriate in being productive at work. Onsite managers and teams also should be sensitive to the expatriate's emotional and psychological needs for decompression, change, and support. This also is the time to help them establish familiar touchstones and activities in the community, such as joining sports groups, churches, or community groups.

4. Celebrate and debrief. At the end of the assignment, it is important to celebrate and debrief the expatriate's experience and contribution to the onsite team. Going away parties and formal procedures to debrief, gather lessons learned, and transfer knowledge all are important elements of this activity. It is advisable to create an exit strategy for the expatriate 1 month in advance, if possible.

Human resources and other organizational support functions. Human resources and other organizational support functions such as the logistics company supporting expatriation, which carries out a logistic function, play important roles throughout the entire life cycle of an expatriate assignment. Five specific recommendations are described below.

1. Identify qualified candidates. As mentioned for other stakeholders, it is critical to select the appropriate individuals for an expatriate assignment. The human resources department plays a critical supportive role in this effort. Specific activities include tracking where people are on assignment, when their assignment will end, and what plans they have following the assignment. They also could annually survey the employee population to gauge employees' interest in expatriate assignments. Based on these results, a resume repository could be assembled that documents employees' technical, leadership, cross-cultural, and language skills as well as their availability for and interest in expatriate assignments. Onsite managers who need people could then review the database and contact people of interest. Participants also identified the need for better pre-screening processes to identify individuals who could adapt to other cultures. A helpful tool for doing so is the Intercultural Development Inventory (Hammer, 2009). This tool indicates where the respondent falls on a spectrum from ethnocentrism to ethnorelativism, which in turn suggests their openness and adaptability to other cultures.

Employees who are interested in expatriate assignments could be invited to complete this inventory and this information could be included in the database.

2. Take care of the details. Expatriate assignments require attention to many details affecting housing, work assignments, and immigration issues. Expatriates should be given a single point of contact for questions and support through the process. Simple, clear checklists also could be assembled for specific areas and countries and given to the expatriate to guide him or her through the preparation process. It is important to be aware that these checklists need to be highly customized because each assignment and location varies. Human resources personnel also need to be fluent with all the relocation benefits available so the employees can make sound choices for themselves before they leave on assignment.

3. Provide adequate training and information. Successful expatriates are those who have received sufficient preparation for them to navigate the new country and work site. Sufficient preparation includes cultural and language training as well as information about basic safety, how to get around, and how to deal with medical needs and emergencies. Some of this information is best delivered before departure, whereas other information needs to be provided through an orientation or welcome package they receive upon their arrival in the country. Therefore, human resources should coordinate with onsite managers and teams to promote effective dissemination. Human resources also could offer courses in working abroad. During such courses, past expatriates could share their stories, present cases, and invite aspiring expatriates to anticipate how they would handle things differently.

4. Involve knowledgeable others through mentoring. Participants emphasized the value of having mentors in advance and onsite to help answer their questions and ease

their transition. Human resources can help by setting up a mentoring program of previous expatriates (mentors) and aspiring or new expatriates (protégés). Mentors could provide personal stories and insights to help protégés find and prepare for their assignments, review and explain any information and checklists they have received, and help monitor that they have completed all the necessary steps. This type of program would promote organizational learning, give past expatriates the opportunity to debrief and vicariously relive their experiences, and give new expatriates needed support.

5. Allow for debriefing and giving back. Several participants expressed their strong desire to share their experiences once they returned to the US. Returning expatriates could be given the opportunity to debrief and pass on their learning by involving them in creating the various support measures discussed in this section, such as delivering courses, presenting cases, or acting as mentors. Given the often life changing experience the expatriates gain through their experiences, it makes sense for the organization to create mechanisms to allow full transfer of knowledge and learning to occur following these experiences.

Limitations

Although this study generated several important insights, it is necessary to acknowledge the limitations of the research. First, the majority of those interviewed were from one organization that has expatriates starting and completing assignments on a regular basis as a part of their business. Additionally, the participants were technical individual contributors and first-level managers rather than executives or employees at other levels of the organization. Moreover, most participants had only completed one expatriate experience in their working life. Therefore, these findings are not intended to be representative of other organizations or other expatriates. To produce more

transferable results, it would be necessary to conduct more qualitative and quantitative research within various settings and sectors.

Second, only expatriates were interviewed as part of this study. No home managers, onsite managers or teams, human resources personnel, or family members of expatriates were involved in the study. Each of these stakeholders likely have a different perspective on the issues examined in this study. It is advisable to gather perspectives from these stakeholders before any extensive changes to the expatriate program are instituted.

Suggestions for Future Research

One suggestion for research is to expand the present study to include expatriates from various settings and industries. In particular, it would be beneficial to study organizations that send expatriates less frequently and also send expatriates at various levels to determine whether the findings gathered through this study are applicable to other settings.

Another suggestion for research is to gather the perspectives of the other stakeholders in the process (e.g., home managers, onsite managers or teams, human resources personnel, or family members of expatriates) to confirm and extend the findings generated through this study.

A third suggestion for study is to conduct action research using one or more of the recommendations outlined in the present research. For example, the organization could create an expatriate mentoring program and gather data about the benefits of such programs for the organization, aspiring expatriates, and past expatriates. The findings of this type of study would generate information that could confirm and further justify the

present study's recommendations or clarify what measures truly would be beneficial for the organization.

Summary

This study examined the design and impacts of an expatriate program at a large multinational organization. Eleven recent expatriates at one organization were interviewed and the data were subjected to content analysis.

Study findings were generated regarding participants' experiences during each phase of their expatriate assignment, including selection, preparation, arrival and adaptation, and repatriation. Participants were mixed in their evaluation of the company's expatriate program, with some believing it worked well and others pointing out needed improvements. Participants offered six key recommendations to the organization: (a) pick qualified individuals for assignment, (b) help them take care of the details, (c) provide them with adequate training and information, (d) involve knowledgeable others in the process, (e) plan for the expatriates' return in advance, and (f) allow for returning expatriates to debrief. In short, the program evaluation of the study organization's expatriate program suggests that it is moderately effective in terms of meeting its goals. Participants did note several areas of success, although there is room for improvement.

Detailed recommendations for expatriates, home managers, onsite managers and teams, and human resources and other organizational support functions were offered. Suggestions for continued research include expanding the present study to other settings, gathering the perspectives of the many stakeholders to the expatriate process, and conducting action research based on the recommendations offered in this study.

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Appendix A: Study Invitation

December 3, 2012

Dear Individual Contributor/Worker:

As you know, business is ever-demanding and dynamic. Expatriate assignments for multi-national organizations has become more common as our global economy continues to evolve.

I'm a graduate candidate in the Master of Science in Organization Development at Pepperdine University. I am seeking your participation in an important research project evaluating The Boeing Company's expatriate program related to acculturation topics. Knowledge gained from this study will be useful in determining areas of strength and possible areas for improvement. The information will be evaluated using existing research in the field to contribute to the information available to multi-national companies.

The purpose of this study is to examine the effectiveness of the acculturation training and processes delivered as part of the company's expatriate program. The following research questions will be examined:

1. What is working well?
2. What improvement areas exist?
3. What other approaches might be more effective?

Your participation is voluntary and will not have any effect on your job status. Your interview responses will be a part of a research project that is a partial requirement for a master's thesis that I am writing. Your participation would involve completing a one-to-one telephone or face-to-face interview, designed with the current research in mind and will take approximately 50-60 minutes to complete. The interview questions will focus on your experiences related to working in an expatriate venture.

All responses will be kept confidential. Only aggregate data will be reported in the thesis or in any subsequent analysis beyond the thesis and possible future publication of the results. Questionnaire and interview data will be stored securely in the researcher's locked file cabinet for five years, after which all of it will be destroyed.

To support my current research schedule all interviews will need to be completed by February 1st, 2013. Please reply to [contact information] if you are willing to participate and we can set up a time that works best for our schedules.

Thank you in advance for your support.

Victoria J. Hurlock

Appendix B: Consent Form

INFORMED CONSENT FOR PARTICIPATION IN RESEARCH ACTIVITIES

Participant: _____

Principal Investigator: Victoria Hurlock _____

Title of Project: Evaluation of a Relocation/ Expatriate Program of a US-Based Multinational Corporation _____

1. I _____, agree to participate in the research study *being conducted by Victoria Hurlock under the direction of Dr. Julie Chesley*.

2. *The overall purpose of this research is:*
The purpose of this study is to examine the effectiveness of the acculturation training and processes delivered as part of the company's expatriate program

3. My participation will involve the following:
one-on-one 50- to 60-minute interview

4. My participation in the study will be in the duration of 50 to 60 minutes. The study shall be conducted by telephone or at in-person at my work site.

5. I understand that the possible benefits to myself or society from this research are:
Increase my understanding of my own experience as an expatriate and contribute to increased understanding of those working in this field

6. I understand that there are certain risks and discomforts that might be associated with this research. These risks include:
There are no major risks associates with this research.

8. I understand that I may choose not to participate in this research.

9. I understand that my participation is voluntary and that I may refuse to participate and/or withdraw my consent and discontinue participation in the project or activity at any time without penalty or loss of benefits to which I am otherwise entitled.

10. I understand that the investigator(s) and the University will take all reasonable measures to protect the confidentiality of my records and my identity will not be revealed in any publication that may result from this project. The confidentiality of my records will be maintained in accordance with applicable state and federal laws. Under California

law, there are exceptions to confidentiality, including suspicion that a child, elder, or dependent adult is being abused, or if an individual discloses an intent to harm him/herself or others.

11. I understand that the investigator is willing to answer any inquiries I may have concerning the research herein described. I understand that I may contact Dr. Julie Chesley at [contact information] if I have other questions or concerns about this research. If I have questions about my rights as a research participant, I understand that I can contact Doug Leigh, Chairperson of the Graduate School of Education & Psychology IRB, Pepperdine University, at [contact information].

12. I understand to my satisfaction the information regarding participation in the research project. All my questions have been answered to my satisfaction. I have received a copy of this informed consent form which I have read and understand. I hereby consent to participate in the research described above.

Participant's Signature

Date

Appendix C: Interview Script

Introductory Statement:

Thank you for taking time today to talk with me. I'm a graduate candidate in the Master of Science in Organization Development at Pepperdine University. Your participation is voluntary and will not have any effect on your job status. Your interview responses will be a part of a research project that is a partial requirement for a master's thesis that I am writing. All responses will be kept confidential.

The purpose of this study is to examine the effectiveness of the acculturation training and processes delivered as part of the company's expatriate program. The following research questions will be examined:

1. What is working well?
2. What improvement areas exist?
3. What other approaches might be more effective?

During this interview I'll ask you a series of questions. If for any reason you do not feel comfortable, you do not need to answer every question.

I'll be recording the interview and will have the information transcribed to ensure that I have an accurate record of all inputs.

At the end of the standard questions you will have an opportunity to add anything that you think is important to share about this program. This should take approximately 50-60 minutes to complete.

Do you have any questions about the process before we proceed?"

Participant Name _____ Code _____

This first section is intended to gather some basic information before starting on the specifics of acculturation:

1. Are you currently on an expatriate assignment? Yes _____ No _____
If no, when did you complete your last assignment? _____
2. What is/was the duration of your assignment? _____
3. Have you been on more than one expatriate assignment?
4. Did this assignment include just yourself or were family members with you during the assignment?

This series of questions is referring to the time prior to assignment selection

5. How did you find out about the assignment?
6. Describe the selection process.
7. How did the process work for you?
8. What would have worked better for you?
9. What was your motivation for wanting this assignment?

The next series of questions relate to the preparation for your assignment as it relates to cultural aspects.

10. How long did you know you were going to go on assignment prior to the assignment start date?
11. Describe how the pre- departure preparation occurred? If family members were on assignment; what was their pre-departure preparation like? (The following may be prompts to further explain)
 - a. What type of training ?
 - b. What information available to you and your spouse?
 - c. Assessments?
12. Did you speak the language prior to beginning your assignment? Yes _____ No _____
13. Where were you on assignment?
14. How did/does the culture differ from your home culture?
15. How did the preparation work for you?
16. What would have worked better for you?

The next series of questions relate to the on assignment:

17. Describe arrival in your assignment country.
18. What was it like for your family members?
19. What sort of adjustments , if any, did you make?
20. Describe the work location and environment in your assignment country?
21. What worked well for you?
22. What would have worked better for you?

The next series of questions relate to the repatriation process:

Have you repatriated back to your home country after an expat assignment? If yes:

23. What was it like for you personally for the transition back to your home country?

24. What was it like for your family members?
25. Describe your work environment upon return to your home country and/or organization?
26. What worked well for you?
27. What would have worked better for you?

The next series of questions relate to your career

28. What has this experience done for your career?
29. What worked well for you?
30. Would you consider another expat assignment with this company?
31. Is there anything else you would like to add about your experience?