

The Ideal Expatriate

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Recently, one of us witnessed this: On a street corner in New York City, unemployed immigrant men are gathered in a daily ritual, awaiting contractors seeking to hire day laborers. One contractor drives up, leans out of his truck window, and shouts, "Who knows how to work on a roof?"

That's assessment and selection at its most basic. The contractor is trying to determine the technical competency of a job candidate. If an immigrant answers "I do," he gets a job. The contractor's question may seem like a slipshod approach to assessment and selection, but he's hiring the immigrant for only one day, and will pay him maybe \$50. Very little is at risk.

This article is not about \$50-a-day roofing jobs. It's about \$150-an-hour (or more!) professionals being selected to do risk-laden, complex work over a period of years in a faraway nation and unfamiliar culture, which in turn requires them to uproot themselves, their family members, and their household goods, all at company expense. If the assignment lasts three years, it'll almost certainly require the company to invest well over one million dollars.

What kind of assessment and selection process is used by companies for such positions? Many ask, "Who knows how to do this job?" If an employee who "knows how" is willing to relocate, he or she gets the job.

Does this approach demonstrate any basic difference from that used by the local contractor seeking poorly educated, low-wage roofers? No. But maybe it should, given that much more is at stake than a patch of roof!

Companies should know that, within our 35-year-old cross-cultural field, no question has received more research attention than how best to determine the suitability of candidates for assignment abroad. The findings support the importance of selecting for technical competencies. In addition — and here's the key point — they also underscore the importance of paying attention to a number of additional factors that come into play because those competencies will be applied in a high-risk situation — a distant and unfamiliar culture.

The subtitle of this article identifies two views of the fundamental objective of expat candidate assessment. "Cream of the Crop" suggests that assessment seeks only those candidates who will perform most brilliantly in a new culture. Many people think that skimming off the cream is the objective of assessments, which might help explain why line managers are reluctant to use them. Perhaps they fear that their most technically qualified candidate will be found wanting when measured against the highest standard of cross-cultural readiness.

But "Cream of the Crop" has never been the objective of research-based assessment. Why? Because there is no reliable way to determine, in advance, who will be the most outstanding performer. There are too many factors impinging on success. Many have nothing to do with the candidate. Many are impossible to assess in advance of the assignment's playing itself out in reality.

For this reason, expat candidate assessment can have only one attainable objective: to identify candidates who are most "at risk" of failure in an unfamiliar culture, those who are most likely to end up at the "Bottom of the Barrel" due to a dearth of cross-cultural competence or low family readiness.

¹ This is an updated and edited version of the article that appeared in *Benefits & Compensation Solutions* during 1998.

To decision-makers in businesses and other organizations who are selecting people for overseas assignments, the cross-cultural field says, in effect:

- (1) Our assumption is that your candidates will be technically competent.
- (2) Our research reveals why certain people are especially at risk abroad.
- (3) Our assessment methods identify high-risk candidates for expatriation.
- (4) Somehow, high-risk candidates must be eliminated from consideration.
- (5) For virtually all other candidates, our coaching and support methods can enhance cross-cultural competencies and thereby expatriate success.

Eliminating high-risk candidates from consideration is tricky. People who deeply desire to be sent abroad always have the option of legally challenging the conclusion that they are somehow ill-suited for that type of work. The solution has been to work in partnership with employees and family members to help them objectively assess *their own* suitability. The goal is for candidates who would face a major risk overseas to voluntarily withdraw or postpone.

Let's turn now to what should be assessed to gauge cross-cultural suitability. (Technical competence is not our concern here.) We believe there are two principal assessment targets. One is the potential "cross-cultural competence" of the candidate and his or her spouse. This includes knowledge, skills, and personality traits, about which we'll have more to say shortly. The other is what we'll call "situational readiness."

Situational readiness takes in all factors that come to mind in response to this question: "Is this period of my life a good one in which to relocate myself and my family to another country?" Here's a sample of situational questions that each candidate for expatriation, together with his/her spouse, needs to ask:

- (1) Here at home, is there at this time any practical issue that requires my sustained attention, such as a bankruptcy, lawsuit, divorce, property sale, aged parent, or sustained illness of a close relative?
- (2) Does any family member who will accompany me abroad have a special need — medical, physical, psychological, educational, sports, etc. — that might be very difficult to satisfy there?
- (3) Will my spouse (or significant other) be deeply disappointed about putting on hold a promising or lucrative career to accompany me?
- (4) Will I be taking along one or more children on my assignment abroad? Especially if they are teenagers, how will they react to being uprooted?
- (5) Am I hoping that the novel environment abroad will revive my marriage?

It's worth emphasizing that, in many cases, worrisome answers to questions such as these lead to a postponement for a few years of one's candidacy for expatriation, not to an abandonment of that candidacy.

During past decades, the most research interest has been in personality traits. Findings typically are expressed in terms of personal qualities that correlate positively with cross-cultural success. Traits considered highly desirable, and about which there has been broad research agreement, include:

empathy	initiative	flexibility
respect	interest in the local culture	sociability
positive self-image	open-mindedness, nonjudgmentalness	tolerance for ambiguity

Much of the research was carried out using accepted social scientific methods. Three problems have emerged. First, many studies yielded long lists of desirable traits.² Our view as practitioners who work with expats is that lengthy lists of desirable traits, each described with painstaking thoroughness, is overwhelming to family members who have no personal experience to provide a context for understanding them.

The second problem is that there's been an understandable tendency to slide into saying that one's possession of these desirable traits "predicts success" overseas. It's more accurate and defensible to say that a significant *scarcity* of these traits puts an individual or family at high risk of failure.

The third problem derives from the second. Managers charged with making candidate assessments tend to expect that some instrument or other will magically enable them to make a judicious choice. Result: If you want a neat package that includes a professional-looking instrument, research validations, long lists of traits, computer scoring, individual feedback reports with colorful graphs, and the promise of prediction, someone out there will sell it to you. *Voilà*, you can check "candidate assessment" off your to-do list!

It would seem as though the personality traits of the individual are the only variables that make a difference. (What a quintessentially American point of view!) But reality is complex. A more complex approach is needed.

So what's missing? It's a rich, broad, variegated understanding of the components of "cross-cultural competence," which includes desirable personality traits plus knowledge and skills known to be useful in an unfamiliar culture.

Missing, too, is extensive face-to-face discussion with a cross-culturally experienced interviewer — ideally, one who has spent several years as an overseas assignee. Such a person is likely to be attuned to assignment and adjustment issues and more effective than, say, a cross-culturally inexperienced clinical psychologist in assessing a candidate's suitability for the intensely human challenges of day-to-day life and work among culturally different others. In short, if you rely exclusively on an instrument to assess expat candidates, you're on shaky ground. Interviewing is an indispensable part of the picture.

Interviewing verifies and, more importantly, supplements the coverage of an instrument, enabling the assessor to more fully understand the components of the candidate and spouse's cross-cultural competence: knowledge, skill, and personality. It gives the assessor an opportunity to listen carefully for what lies "between the lines" in the experience, attitude, motivation, temperament, and expectations of candidate and spouse. An added benefit is that an interview develops accurate expectations in the minds of family members, thereby initiating the process of expat family coaching and support.

Behavioral interviewing is a reliable technique widely used in recruitment and selection. Its premise is that past behavior is the best predictor of future performance. Behavioral interview questions begin with phrases such as, "Tell me about a time when you. . .," and seek detailed responses. A challenge of this technique is that the interviewer needs to be self-disciplined regarding the asking of non-leading questions. As noted above, the interviewer needs to be *personally* knowledgeable about expatriate life and cross-cultural adjustment (and, ideally, about the assignment that's being offered).

In Summary

The goal of assessment is, or should be, *not* to find those most likely to succeed, but rather to find those most at risk of failure. People at risk should be encouraged to withdraw their candidacy.

Commercially available instruments tend to focus on the evaluation of desirable personality traits. The factors impinging on success range far beyond personality variables, so other approaches should be added.

Families need help in assessing their situational readiness.

² For a review of research and discussion of 19 "skills," see Daniel Kealey, "The Challenge of International Personnel Selection," in Dan Landis & Rabi Bhagat, eds., *Handbook of Intercultural Training*, 2nd ed., Sage, 1996.

Families should be interviewed in order to help both company and family understand the extent to which family members' cross-cultural competencies prepare them — or impair them — for the challenges of immersion in an unfamiliar culture.

A Good Low-Budget Assessment

Periodically hold half-day workshops for employees interested in expatriation. Invite spouses! Familiarize attendees with the pros and cons of expatriation. Have recently returned or home-leave expats speak. Emphasize personal and family challenges, and discuss situational readiness. Answer questions. Attendees may then be considered "expat candidates," if they so choose.

When an overseas position becomes available, contact technically qualified expat candidates. Expect each short-listed candidate — even if there is only one — and his/her spouse to participate in the following self-assessment procedure, which is best implemented by an external consultant.

(1) Meet privately with candidate and spouse. Help them consider in detail their situational readiness, focusing attention on the personal, family, and professional pros and cons of relocating. Interview them to reveal the extent to which they have cross-cultural knowledge and skills. Help them evaluate their situational readiness and knowledge base. Remind them that they are free to withdraw (usually, a postponement).

(2) If the wisdom of relocating remains in doubt, put employee and spouse into contact with an expat family in the country in question. Encourage the two families to communicate on a wide range of issues.

(3) Acting on the employee and spouse's behalf, contact references named by them and seek observations about how the employee and spouse behave in situations involving stress, ambiguity, and human variability (gender, ethnicity, nationality, etc.). Report findings (unattributed) back to the employee and spouse, and support them through this final opportunity to withdraw from consideration. As an alternative, make use of GROVEWELL'S 360° *Survey on Intercultural Relocation Adaptability*; [click here](#) for details.

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