Teaching the Expatriate Experience: A Computer-Based Approach

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ABSTRACT. Students often have little knowledge of and appreciation for the cross-cultural and organizational changes associated with an international assignment. This paper describes a personal computer program designed to make students more sensitive to the adjustments that may be needed due to the cultural differences between home and host cultures. It also explores contrasts between characteristics of a manager's previous assignment and the new assignment, emphasizing how differences in organizational centrality, influence and size may require managers to develop different managerial approaches.

BACKGROUND

Recent reviews of the literature on intercultural adjustment and expatriate performance paint a disturbing picture. Estimates of the number of international assignments ending in failure range from 25 percent to 50 percent (Black, 1988; Copeland and Griggs, 1985; Desatnick and Bennett, 1978; Henry, 1965; Howard, 1974; Lanier, 1979; Mendenhall and Oddou, 1985; Misa and Fabricatore, 1979; Torbiorn, 1982; Tung, 1981; 1987). Moreover, estimates of failed assignments do not include those instances where the assignment was completed, but at some minimal level of performance. It has been estimated that an additional 30 percent of American expatriates who

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stay in their international assignments are regarded as either marginally effective or ineffective by their organization (Copeland and Griggs, 1985; Lanier, 1979).

Estimates of the cost of an individual failure range from $40,000 to $250,000 (Baker and Ivancevich, 1971; Black, 1988; Copeland and Griggs, 1985; Edwards, 1978; Harris and Moran, 1979; Holmes and Piker, 1980; Misa and Fabricatore, 1979; Tung, 1982). These estimates represent tangible costs of failure to organizations. They do not reflect intangible costs such as the loss of goodwill or of business opportunities irretrievably lost to the firm (Copeland and Griggs, 1985; Edwards, 1978). Nor do such estimates consider the personal, psychological (Bormann, 1968; Gardner, 1962; Gaylord, 1979; Grain and Cooper, 1981; Harvey, 1982; 1985; Hays, 1974; Hudson, Bacakat & LaForge, 1959; Kelman, 1963; Lundstedt, 1963; Smith, Fawcett, Ezekiel & Roth, 1963; Triandis & Vassiliou, 1967; Tung, 1982) and financial costs to individual employees and their families (Mendenhall and Oddou, 1985). At the national level, annual estimates of the cost to US business of failed assignments is calculated in billions of dollars (Copeland and Griggs, 1985).

In light of these alarming figures and in response to the rising trend of sending managers abroad, one might expect issues relevant to expatriate assignments to be given wide attention in courses on international business and management. Unfortunately, an analysis of introductory international business texts does not bear this out. In a content analysis of 20 international business texts, eleven did not include either a chapter or section addressing expatriate issues. Of the remaining nine, eight devoted a section to the topic, which covered from as few as one to as many eight pages. Only one dedicated an entire chapter to expatriate assignments.

In an effort to help students understand the issues involved in international assignments, and to help them identify areas where they may require skill development to successfully complete international assignments in the future, we developed a teaching approach using an experiential, computer-based software. This software was developed under a Title VI Grant (International Business and Education Program) from the U.S. Department of Education. One of the intents of Title VI grants is to foster cooperation between the academic and business sectors to foster U.S. competitiveness internationally. As a
result, the software we developed was designed for use both by business persons and graduate business students.

Our objective was to have students simulate the experience prospective expatriate managers undergo when they consider accepting an assignment. The purpose was not to present students with a description, but to have them experience the exploration and questioning a manager might go through. This objective stemmed from a recognition that, in practice, concepts probably only become meaningful as learners, themselves, are able to find ways to "situate" them in their own experience and, as a result, make them personally relevant (Brown, Collins, and Duguid, 1988). In addition, if situations themselves are taken as the contexts that are to be learned about (e.g., Lave, 1988), then it is not just concepts, but also the social processes that lead to the construction of knowledge and "appropriate ways of thinking" that can and need to be taught and learned.

In this paper, we describe a personal computer program—Expatriate Profile (EP)—that is designed to help students ask appropriate and relevant questions about foreign assignments to help them reach answers about the different ways in which they should prepare themselves. This is done by encouraging students to simulate the role of a prospective expatriate manager and then to explore, in advance, the various issues that a particular foreign assignment is likely to generate. As a result of such exploration, students gain a deeper understanding of the issues and concerns involved in accepting an international assignment and, once they enter the workforce, are more likely to approach international assignments with less apprehension and more realistic expectations.

**SETTING THE CONTEXT**

Prior to introducing students to the software, we dedicate a portion of one class session to a general discussion of the issues surrounding international assignments. The basic perspective taken in considering these assignments focuses on the changed nature of work and personal life once a decision to accept has been made. For example, we point out that in international transfers managers leave familiar settings and enter unfamiliar ones. At a personal level, they leave a well-known
cultural environment to join one that is, at least to some degree, foreign and which may also require very specific adjustments in living habits. Such adjustments tend to have an even more disruptive impact as managers are accompanied by their families (Black, 1988).

Talk also focuses on how the job context changes for an international manager. Because such a manager has moved from being a firm member in the parent country to being a firm member in a foreign subsidiary, organizational role adjustments are also likely to be necessary. Changes in organizational context almost invariably affect the power, responsibilities, and rewards a manager enjoys. At the same time, such changes often introduce new and unanticipated obstacles to job performance. There can be little doubt that an international transfer generates new uncertainties from a variety of different sources.

Once students have a basic framework for thinking about expatriate assignments, we move on to consider some actions managers might take in response to the uncertainties created by an international assignment. We note that people usually want to reduce such uncertainty and recreate a sense of control. One approach is to simply ignore the looming uncertainty until one is in the middle of it, facing it directly. This is exactly the sort of approach that the literature suggests has led to the current levels of inadequate performance by many expatriate managers.

We suggest that a preferable approach is to explore the situation along three dimensions: the individual, the job, and the host culture. By examining the inter-related fit between an individual manager’s characteristics, the position and its organizational context, and ways in which the host and home cultures differ, it is possible to develop an understanding of where problems may arise or why challenges may be greater than expected. Such an exploration enables managers to make anticipatory adjustments that are likely to increase their level of comfort in carrying out their new assignment. As this is the primary objective of EP, i.e., to point out different sources of change and to raise questions in managers’ minds as to whether it may be possible to take steps that will bring about anticipatory adjustments that are likely to help cope with these expected changes, student now have an unambiguous understanding of the situation which they are about to enter. They are now ready to begin working with the software.
Before they do so, however, we point out a second objective of EP; to help managers consider which among various adjustment modes may be most appropriate in their new situation. Confronted with alternative ways of doing things, it sometimes makes sense to adjust to the local way. However, this is not always the case. Situations exist where it is more effective to avoid an issue completely and/or to withdraw. Alternatively, it sometimes makes sense to simply do what one believes is best, the assumption being that one's own preferences may be the basis for a better way of proceeding. Each person has a different propensity to employ these adaptive styles, and situations have unique tolerances for different management approaches. In working through EP, the aim is to bring these sorts of decisions and their associated choices to managers' attention.

The adjustment mode a manager adopts may emphasize a need to change the situation or organizational role or it may emphasize acceptance of constraints imposed by the situation and the role. Again, the aim of the program is to make participants aware of the different choices that are available. Also, it attempts to raise questions about the extent to which such choices may be realistic and appropriate so far as different aspects of a particular assignment are concerned. Because the learning objective is to increase awareness, EP does not take a position as to which mode of adaptation is the better choice.

**USING THE EP SOFTWARE**

*Expatriate Profile* is a self-managed personal computer program. It is designed to generate background information on the person accepting an international assignment and the nature of the position to which he or she has been assigned. It also seeks to obtain information about the organizational unit that the manager is joining and, in particular, how that unit fits within the wider organizational context. *EP* explores a subsidiary's size, the way it is evaluated by the parent firm, and its organizational centrality in terms of whether its main exchange relationships are with other subunits of the firm or with other organizations and individuals in the local environment.

To make the student's interaction with *EP* meaningful, prior to working with the software students need to develop a picture of
themselves and an imaginary company in which they'll be working. The picture includes such personal information as the extent of their foreign living and travel experience, their desire for an international assignment, their level of self-efficacy regarding an assignment, and their expectations about interaction with the host culture. They must also create a sketch of their work experience and the skill set that they bring to the assignment. Just as they sketch a portrait of themselves, they must also develop one for the organization. They must determine such things as how large their imaginary organization is, how important international operations within it are, how the particular subsidiary the manager will be assigned to fits into the larger organizational structure, and what the subsidiaries experience and position within the host country is. Finally, students must envision and define the nature of the position they will fill on the assignment—the work roles and accompanying skill set, as well as the country where the position is located.

In a more recent use, students were asked to locate managers who had been on an international assignment and then model the profile they would use in the exercise on these managers and the firms in which they worked. Students felt this would make the experience even more realistic.

Armed with a profile of themselves and their imaginary companies, students sit down in front of a computer and turn on the program—Expatriate Profile. After students have identified themselves, a screen comes up and explains that the intent is to explore various issues that may arise as a result of their international assignment. It suggests, in general terms, some of the issues that might be considered. It then asks the user, through on-screen prompts, to identify the country to which they have been assigned from a hierarchical menu that includes most countries in the world. Probes are made such that students provide details about their own national background and the backgrounds of their family members (if their simulated profile includes a spouse and children), their degree of international experience, and the type of organizational position that they will hold while abroad.

Even at this early stage in the program, students receive feedback in the form of analysis and counsel. For example, if a student responds to a question on marital status by indicating he/she is married,
the program follows up by asking whether or not the student has children as well. This is then followed by a question as to whether family will accompany the student abroad. By now the program has three pieces of information that it can analyze.

If students indicate that family will be accompanying them overseas, the program responds by noting that the presence of family can generate higher levels of stress for a new expatriate because familial duties in a new cultural setting constitute additional responsibilities at a time when there are many new challenges to adjust to at work. Moreover, the differing levels of host culture interaction among expatriate, spouse and children may create additional pressures and increase the likelihood that misunderstandings and miscommunication will develop within the family.

The program goes on to note, however, that families are able to provide a stable community of support for expatriates, who may perceive little stability elsewhere, at work or in various social settings. The analysis concludes by suggesting the user explore these issues with spouse and children and that the user consider ways to insure good communication among family members.

As an aside, it should be noted that it is possible to obtain a printout of a student’s responses to items as well as the program’s analysis. However, we prefer to have students take extensive notes because doing so gives students an occasion to reflect on what they are finding out and on what their reactions this may be.

After providing a variety of demographic information so as to establish a foundation for initial analysis, the student is presented with a topic menu (see Figure 1) which describes different modules that the user can select to explore specific issues in more detail. These include a module that analyzes the organizational issues and aspects of the new position and a module examining the work background of the manager and how this background may be related to local subsidiary requirements. There is also a module that considers the manager’s intentions, along with those of his or her family, to establish contact and to interact with the local culture as well as his or her preparedness to do this. There are modules directly concerned with the cross-cultural issues that may arise as a result of moving work activities from the manager’s home country to the assigned country. Finally, there are a series of items that enable managers to get a sense
of the extent to which they tend to adapt, resist or avoid ambiguous intercultural situations along with a commentary on what some of the advantages and disadvantages of these tendencies may be.

In each of these modules, the pattern is the same as that described above. Users provide information about themselves or the job and then receive feedback in the form of analysis, identification of potentially important issues to explore, and counsel on what some appropriate course of action might be. For example, user responses to items that explore the nature of the assignment are cross-referenced to responses about a user's experience and skill set. The program is then able to provide some analysis along the lines of what is shown in Figure 2.

Throughout the simulation, EP generates questions concerning the sorts of issues that are likely to affect the performance of a person assigned overseas. The modules concerned with such subjects as the manager's own organization, the relation of the subsidiary to the parent organization, and the manager's intent to have contact with local culture are, on the one hand, primarily information generating—they ask the user to clarify and record his or her perceptions of these situations.
Based on your experience and considering your firm's requirements you seem to be

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**FIGURE 2. An Example of the Sort of Evaluation Provided by *Expatriate Profile***

Based on these perceptions and assessments, however, the pre-programmed model provides feedback concerning some possible implications of the answers provided. For example, users are asked to indicate whether they intend or want to have extensive interaction with the host culture. Their response to these two questions are matched with what is known about the particular position. For instance, a user anticipating a job as an Asian regional manager with intra-regional liaison responsibilities might indicate that he or she expects and wants to have a lot of interaction with the host culture of the country where they will be based. This combination of responses prompts the program to point out that such managers frequently have restricted opportunities for interaction with the host culture because much of their time is spent attending to matters which extend to other areas of the region.

*EP* also suggests possible actions that may be advisable, given the situation that the user has described. By switching roles in its interaction with the user, from that of being a questioner to that of being a supplier of ideas, the structure of *EP* helps keep the student involved in an interactive, ongoing learning process.
The modules concerned with cross-cultural issues have a different quality to them. Once information about the country of assignment and the manager's home country have been identified, EP is able to present a personalized tutorial concerning relevant cross-cultural differences. The basis for this tutorial and the implications of the relevant cross-cultural differences is Hofstede's (1980) cross-cultural analysis of values relating to the emphasis which different societies place on maintaining power distances, on avoiding uncertainty, on stressing individualism, and on masculinity.

Hofstede (1980) provided data on approximately 50 countries. Consequently, there are a lot of countries in the world that remain unaccounted for. To develop indices for the missing countries, we created expert panels of people who had not only lived in the countries but were also familiar with Hofstede's scales to provide estimates—i.e., high, medium or low—of how they thought these countries would probably rank on Hofstede's scales. In this way, we obtained index estimates for many of the countries in Africa, Asia, Eastern Europe, and the Caribbean which are included in EP (see Figure 3).

As a result of the differences on these various dimensions, the tutorial suggests a number of general behavioral approaches that may characterize these countries. Such approaches may initially seem strange or uncomfortable to the manager who has been given the assignment. Yet, creating this type of awareness is, in fact, a focus and a primary learning outcome that is sought by using EP. In addition, EP highlights those dimensions of work along which differences between practices in the home and host country are likely to be minimal. In these instances, relatively little difficulty should be experienced so far as cross-cultural adjustment is concerned.

In the class session following their experience with EP, we hold a debriefing. Discussion revolves around four issues. First, did the program cover topics that students had not anticipated? This question allows us to explore two issues: how well students understood the overview session on expatriate issues which led into their experience with EP, and why prospective international managers may be unprepared for their assignments. Asking this question allows us to consider how awareness of various aspects of the international assignment may develop and shift over time.

The second issue is whether or not students experienced any sur-
FIGURE 3. Screen from Hofstede Module Comparing USA and Japan

prises. The emphasis is on instances during their usage of the program where they were particularly struck by something that seemed initially irrelevant but was found not to be or that was counterintuitive or that was completely unexpected. Students typically zero in on implications of the assignment that were raised when the program considered responses from disparate areas. The example cited above of a regional manager who wants a high degree of host culture interaction is one such instance. This phase of the debriefing is usually a time when students ponder the complexity involved in international assignments.

The discussion then shifts to an evaluation of the relevance of the analyses students received. Attention is directed toward whether or not students were given recommendations that led to clear, specific courses of action. This issue provides an opportunity to consider the possibility and effectiveness of anticipatory adjustments.
The final phase of the debriefing is centered on issues of self-efficacy—are students confident about their prospects for success if they accept their imaginary assignments. In the context of this exercise, self-efficacy is viewed as a combination of tolerance for the amount of uncertainty surrounding the assignment and a belief that one has the requisite skills and abilities to overcome challenges the assignment may present. Students are encouraged to look inward and reflect on how confident they now are as a result of what they have learned about themselves, the country they will be going to, and the requirements and organizational context of the position. We avoid suggesting that high or low levels of self-efficacy are either good or bad. Rather we stress the importance of identifying these issues prior to accepting an international assignment.

**HOW DO STUDENTS LEARN AND WHAT DO THEY LEARN?**

*Expatriate Profile* is both a computer simulation and a computer-aided situation analysis system. What it simulates and makes concrete for students is how managers who have been assigned overseas are likely to perceive their new role in the company and their preparation for that role. It matches and compares these perceptions with findings from various research fields. Based on these assessments, *EP* raises additional questions and suggests possible implications concerning issues that may need to be explored further by the user.

Simulations and computer-assisted decision aids are usually developed to help people gain personal insights and understandings and, as a result, a sense of control over important situations that are also uncertain and complex. *EP* is used to test some ideas about what possibly may work in preparing for an international assignment and to explore how both the user and the situation might be influenced by certain initiatives or changes. There are numerous examples of computer-based training aids available in the technical arena. New aircraft and car designs may be tested out in air tunnels to determine if they have desired properties. Many simulated models of individuals, organizations, and societies have been built in order to find out how they may be expected to develop and evolve given assumptions con-
cerning critical variables (e.g., birth rate, death rate) and possible changes in these variables. Pilots learn how to fly planes in flight simulators.

In all these cases, the situation being modeled is complex and difficult to predict and control. The assumption underlying their use is that by working with a model of the situation, participants can improve their familiarity and awareness to the point that the actual situation itself becomes more predictable and controllable.

In the case of EP, we ask students about their perceptions, their intentions and their assessments so far as their imaginary overseas assignment is concerned. Then, based on decision tree assessments built into the program, we trace out the implications of a student’s position along with things the student should be doing to prepare for the assignment. Thus, EP helps students, first, by asking them to clarify what they know about their expected assignment and, second, by making them more aware of what they might need to know, but don’t. It also facilitates learning by suggesting specific ways in which this information may be relevant specifically to the assignment faced. As a result, students develop their own models of how they personally should prepare.

Though EP provides analysis and comment, it makes few direct recommendations. Rather, the implicit assumption is that once relevant questions have been clarified, managers themselves are in the best position to find answers and decide for themselves as to how they should further proceed to prepare themselves for the assignment.

As a result of participating in EP, students experience two sorts of learning. One type of learning focuses on getting new information, ideas, and insights. People who have not actually lived abroad, for example, may find the notion of “culture shock” difficult to imagine or overwhelming in its unknown qualities. EP makes the abstract concept of culture shock concrete in the context of the particular assignment that the student is exploring. It identifies how, for example, in other cultures there are norms and values which define standards as to what is appropriate—and that these norms and values differ from country to country. Specifying what these norms and values are, even to a limited extent, EP describes possible behavioral consequences. As a result, the student learns what to expect and also re-
spect, in the other culture. Differences become more understandable and the potential for unpleasant surprises is reduced.

The second type of learning involves unlearning of what are inappropriate expectations and attributions with respect to the country of assignment. These inappropriate attributions are most often assumed to occur primarily in the cross-cultural domain. Equally likely, however, are inappropriate expectations so far as the new assignment and the ongoing relationship to the firm is concerned. For example, in some companies many of the concerns that are important to foreign subsidiaries seem insignificant to those back at the parent firm's headquarters. The idea of having to manage a situation that is relatively unfamiliar, and also having to recognize that in the broader scheme of things, one's actions may be considered relatively insignificant, can be a difficult adjustment for many managers to make. Based on insights from the international corporate strategy literature, EP seeks to make this broader context and its implications clear to participants.

**EXAMPLES AND BENEFITS OF PARTICIPATION IN EP**

As Expatriate Profile is a simulation, the specific sorts of learning that occur depend to a great degree on the interactions between the student and the program. What students learn and their reactions to their learning vary. A common initial reaction is to be a bit skeptical. How can a computer program and decision aid really give me an analysis that is personally relevant so far as my new international assignment is concerned?

EP gains credibility as students recognize that the initial questions asked are directly relevant and necessary if EP is to make any sort of useful assessment. Its credibility is further enhanced as it interacts with the student to make sure it has correctly understood this critical information, and then starts to present text and feedback that are directly relevant to the manager. For example, after having obtained initial information about Roger Dunbar, EP would respond, “Roger, you are from New Zealand and your new assignment will take you to the USA. I now want to present you with some information that compares the types of values prevalent in New Zealand with the types of values that are prevalent in the USA.” As Roger notices that this
information tends to confirm his understanding of New Zealand based on his own experience, he becomes more inclined to believe the information provided by EP about the USA. Through this sort of interactive process, the program builds its own credibility with students.

Students' reactions to some of the questions which ask about their imaginary employer and the relation between the subsidiary and the parent are, initially, characterized by some bafflement. Many of the students are so focused on the cultural aspects of an international assignment and in considering ways to make personal adjustments in this regard that they have not thought about the organizational context. Some students even suggest that some of the questions call for information that a typical manager preparing for an international assignment would be unlikely to have. On the other hand, most students, after a few moment's thought, start to see why such issues are relevant. A number of students with overseas managerial experience have commented that had they considered such issues before being sent overseas, their expectations would have been both more realistic and clearer, and some of the disappointments and frustrations they experienced would have been reduced.

Another outcome of working with EP is developing an overall sense of the cultural issues that one must deal with along with how such issues might be handled. Students get an idea of those matters that they can tackle before leaving home thereby greatly easing their later concerns. They also learn about what things to ask for while they are still in close contact with those who can provide support and assistance. They come to recognize that it is these insights that start to reduce the uncertainty associated with the international assignment and to increase a manager's confidence that the assignment can be handled effectively.

The impact of the design approach used in EP is implicit. The assumption underlying the design is that it is the users' opinions and assessments that are most relevant for assessing their situation. Thus, answers are accepted and never questioned. This is very much in contrast with expert programs that profess to provide correct answers based on the input received. Instead, EP focuses its effort on exploring the possible implications of the users' assessments which, of course, may eventually result in a change of these assessments. But
again, this is the choice of the user. The implicit modeling of respect for the views of others that pervades the design is probably, in itself, an important ingredient likely to increase the chances of students developing an empathic understanding of the challenges confronted by managers sent on overseas assignments.

REFERENCES


