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Cross-Cultural Training and Executive Performance on International Assignments

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CROSS-CULTURAL TRAINING AND EXECUTIVE PERFORMANCE ON INTERNATIONAL ASSIGNMENTS

DISSERTATION

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CROSS-CULTURAL TRAINING AND EXECUTIVE PERFORMANCE

ON INTERNATIONAL ASSIGNMENTS

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ABSTRACT

CROSS-CULTURAL TRAINING AND EXECUTIVE PERFORMANCE ON INTERNATIONAL ASSIGNMENTS

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Barry University, 2007

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The purpose of this study was to explore the impact of Cross-Cultural Training (CCT) on executives' socio-cultural adjustment and performance during international assignments. The selection of the participants for this qualitative study was purposeful, criterion-based sampling. Six executives from international companies who received CCT were selected for this study. Data was collected through interviews, one interview per participant. The length of the interview was approximately between 45 to 60 minutes. The type of interview instrument used was the standardized, open-ended interview. The gathered data was analyzed through constant comparison; findings were presented according to the research questions.

The findings revealed the need for a more conscientious evaluation from global HRD and international companies of the importance of CCT and its consequences on the social and professional performance of executives. Social adjustment and repercussions on performance are issues that sooner or later will impact and reflect on the ROI (Return of Investments) of international companies.

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INTRODUCTION

Globalization is rapidly progressing in today's world economy and many companies operate in the global marketplace. In the process, more and more organizations are hiring new employees of varying cultural backgrounds. Organizations are faced with the challenge of crossing cultural boundaries, physically, technologically, and financially. Unfortunately, many companies that have been successful in their own countries fail in the global marketplace due in most part to managements' and employees' lack of intercultural awareness.

When sent abroad, executives must know about important issues in the working environment that vary from country to country. In many cases Cross-Cultural Trainers are the ones in charge of instructing executives sent abroad. It is the responsibility of Cross-Cultural Trainers to prepare expatriates and their families to successfully embrace the new culture and avoid uncertainty and/or uncomfortable encounters. In spite of the challenge of adjusting to a new culture, cross-cultural encounters can provide an excellent opportunity for growth, developing creativity and exploring new ways for successful communication at the global business level.

Cross-Cultural Training (CCT) has been considered a tool to promote effective cross-cultural interactions. Thus, more and more international companies immersed in the global market are looking at the effects of CCT and to what extent this training helps expatriates to adapt better to a new country. The number of expatriates has increased considerably in the last 10 years. This is a trend that will continue (2003/2004 Global

Relocation Trends Survey Report). Thus, “the role of cross-cultural training becomes increasingly crucial” (Bhagat & Prien, as cited by Osman-Gani, 2005, ¶ 2).

The success or failure of international assignments depends not only on how well expatriates command verbal and non-verbal communication, social rules and etiquette, but also on how well the training is customized. Even though researchers have emphasized the importance of these issues, Baiyin, Wang, and Drewry (2006) explained, “Despite their potential influences on CCT process and outcomes cultural and cultural differences have not been featured prominently in the literature” (¶ 2). Therefore, there is a need for a deeper understanding of CCT and its degree of effectiveness on trainees’ adjustment and performance. It is the Cross-Cultural Trainer’s responsibility not only to understand the cultural differences between parent and host cultures, but also to be able to explain those differences in a meaningful manner using appropriate instructional methodology and training content.

Rationale/ Statement of the Problem

Successful communication is much more than speaking the language correctly. It has to do with a deep understanding of the culture and social patterns of behavior. In addition to being aware of cultural differences when transferred abroad, executives need to be prepared to adjust to the new culture; furthermore, they need to be active participants in the process of becoming part of the new culture (socialization process). After successful completion of the CCT, executives should be better prepared to socially adapt to and furthermore adopt the new culture. An effective training and an insightful and wise trainer will have expatriates ready to recognize and deal with new social rules of behavior. This process of preparedness or readiness should permit expatriates to speed the process of adjustment and experience the sense of belonging sooner, allowing them to perform better. Such an acquired sense of belonging will allow executives to remove from their minds the worries of the technical aspect of communication as part of the socialization process to focus more exclusively on what they are supposed to do -- perform at their best during the course of the international assignment.

Purpose of the Study

The purpose of this study was to contribute new knowledge to the field of Human Resource and Development (HRD), by exploring the impact of CCT on executives' socio-cultural adjustment and performance during international assignments. There is a need for a deeper and a more comprehensive understanding of CCT and its repercussion on later performance. Thus, this study sought to provide new knowledge for CCT which should contribute to narrow cultural differences between parent and host country, speeding the process of socialization and adjustment of the expatriates and contributing to performance.

Theoretical Framework

Bandura's Social Learning

Bandura (1977) "has developed the most elaborate system of thought on imitation, identification, or modeling as concepts of teaching" (Knowles, Holton & Swanson, 2005, p. 103). Social Learning perfectly applies to expatriates when leaving their home country and dealing with the new culture in the host country. Thus, Bandura's (1977) Social Learning Theory served as one of the Theoretical Frameworks guiding this study. Besides Bandura's (1977) theory, it was important to contemplate a socio-cultural perspective, constituting the second Theoretical Framework for this study.

Research Questions

There is one primary research question with two sub-questions included in this study. The question asks:

1) What is the impact of CCT on executives' socio-cultural adjustment vis-à-vis performance during international assignments?

The two sub-questions are:

a) What are the benefits of CCT?

b) What are the gaps of CCT?

Significance of the Study

There is a need for deeper understanding of cultural differences and the consequent adjustments of instructional methodology and training content for Human Resource Development (HRD), practitioners and training consultants. These issues are particularly relevant for multinational organizations since deep understanding of cross-cultural differences during training helps HRD practitioners deliver effective CCTs . Effective delivery of training will secure a smooth process of adaptation and socialization in the new culture impacting executives' performance. As mentioned previously, it is not only important as a trainer to be fully aware of the differences between parent and host cultures, but also to be able to explain these differences in a meaningful manner.

Additional research is necessary to promote more effective CCT to secure an effective transition through the socialization process, adjustment, and performance of the expatriate. The result of such research will offer numerous implications for HRD practitioners and training consultants.

Origins of the Researcher's Interest in the Topic

I have experienced the phenomenon of Cross-Cultural Training on both sides: as a trainee and as a trainer. My former husband was relocated to Brazil. We both were trained during a weekend by a Brazilian trainer in the USA. I was born in Argentina; therefore, the training for me was interesting, but not completely new since I was very familiar with cultural values in South America. However, for my former husband, who is an American born in Ohio, the training was not enough for him to grasp the main cultural differences that characterized each country. As a result, when we arrived in Brazil, he experienced culture shock. I do understand that a weekend training is not intended to fully prepare a person for cultural changes; however, I always thought that the training fell short on providing him the necessary information to work and socialize effectively in Brazil. Moreover, I always wondered why. I believed the cultural information was adequate; however, I wondered was that enough. In other words, was something more needed?

Did the trainer successfully explain cultural differences between Americans and Brazilians? Was the information enough to guarantee a successful journey through the process of adaptation, socialization, and adjustment to the point of avoiding uncertainty and developing self-confidence and self-esteem? Were the content and delivery of the training the most suitable and adequate for my former husband or any other executive sent abroad? With the information he received, was he going to be able to decrease uncertainty and develop his feelings of adjustment and self-confidence? I used to work as a Cross-Cultural Trainer, and I always felt that the training was not enough for the executives. Even though the information was of great interest for the trainees most of the time, I felt that for some reason the trainings failed their objectives.

Research Design

This qualitative phenomenological study on cross-cultural communication examined the *how* and *what* of the topic. The researcher developed a detailed view from information collected in the field. This qualitative study in the phenomenological tradition explored the concept of CCT vis-à-vis interviews. The selection of the participants for this qualitative study was based on purposeful sampling. The sampling strategy used in this study was criterion sampling. The participants of this study were selected based on a pre-established criterion. Six executives from international companies who had received CCT were selected for this study. The type of interview instrument used was the standardized, open-ended interview. The gathered data was analyzed through constant comparison; findings were presented according to the research questions. The data analysis of this study was conducted according Moustakas' (1994) version of the Stevick-Colaizzi-Keen's method.

Qualitative methods make possible the study of issues whose characteristics are deep and rich in details. "Qualitative methods have distinct advantages for identifying the influence of contextual factors that cannot be statistically or experimentally controlled" (Maxwell, 2002, p. 9). Furthermore, the tradition chosen for the study, phenomenology, is an open approach, free of constraints, and rich in qualitative methods "that typically produce a wealth of detailed information about . . . people and cases" (Patton, 2002, p. 14). Phenomenology follows certain methods or traditions that rather than being predetermined or fixed are "discovered or invented as a response to the question at hand" (Van Manen, 1990, p. 29).

Definition of Terms

Cross-Cultural: Encounters between two or more people from two different cultures.

Cross-Cultural Adjustment: The level of psychological comfort which one feels in a foreign environment (Simeon & Fujiu, as cited in Rokeach 1979).

Cross-Cultural Trainer: A person in charge of training employees in knowledge of a new culture. Topics included in this training are: distance power, non-verbal communication, personal space, time, greetings, and so on.

Cross-Cultural Consultant: This term is distinct from Cross-Cultural Trainers.

Consultants: Internal or external trainers who give training (in the US as well as abroad) on different organizational topics, such as Team Building, Return of Investments (ROI), Program Evaluation, Change, and many other topics aimed to develop specific aspects of the organization. Cross-Cultural Consultants may train either within the United States or abroad.

Cultural Values: An enduring belief that a specific mode of conduct or end-state of existence is personally and socially preferable to alternative modes of conduct or end-states of existence (Rokeach, 1979).

Expatriate: An individual residing temporarily or permanently in a country other than his/her native country. Expatriate is an individual who relocates from one country to another for at least one year (Littrell, et. al., 2006).

Globalization: The movement of goods, services, people, and money across limitless boundaries.

Global Nomads: A member or a group of people who do not have a fixed home, country and, due to personal or professional reasons, move from country to country.

*Relocation***:** To move or be moved to a new place for business purposes.

Host Culture: The culture where the trainee is going to be relocated.

Multicultural Training: Training used to improve the cultural awareness of domestic employees in the hopes of improving their ability to interact with individuals from a different cultural background (Litttrell, et al., 2006).

Parent Culture: The culture where the trainee is from.

Organizational Socialization: The process by which organizations pass on the culture of the organization to new employees and teach them how to be effective in organizations (Swanson & Holton, 2001).

Limitations and Delimitations

There were certain limitations and delimitations taken into consideration for this study. To begin with, it is important to mention that even though the participants were carefully chosen to represent the phenomenon of cross-cultural relocation and its implication, global nomads are located all over the world, and in this study the researcher worked only with executives from North and South America.

Another limitation was that the researcher based her trust on the assumption that all participants were opened, free to answer the questions, and were telling the truth.

Bracketing from personal experiences or personal bias was another limitation since the researcher experienced the phenomenon more than once at both ends: as a trainee and as a Cross-Cultural Trainer. However, the researcher set aside these experiences and allowed the data to speak for itself.

A delimitation of the study is, as mentioned previously, the sample the researcher used. The sampling was limited in the sense that only executives from international companies from North and South America participated, leaving out a big range of executives placed all over the world.

Organization of the Study

The Review of Literature, Chapter 2, followed Chapter 1. It was a relevant and comprehensive review of the areas pertinent to this study. Important and recent information and methodological developments were presented together with the discussion of empirical research. The literature included relevant information gathered during the last 5 years; however, other relevant information was included regardless the date of publication.

Chapter 3 described the methodology and methods utilized in conducting the study. Chapter 4 presented the findings of the study, and Chapter 5 presented a discussion of the findings and their implications.

Chapter Summary

Global economics has developed in such a way that has caused the need for the continued expansion of expatriates to venture into international markets. Many companies that were successful in their own countries have failed when they tried to go global due to their lack of cultural awareness. So, many companies anxious to compete and remain in the global market, turned to CCT as a means of providing expatriates with the necessary information to deal with cultural changes in the host country, not only at the professional level, but also at the personal level which reflects and influences the executives' social domain and professional performance.

Successful communication involves much more than speaking the language correctly. For successful international assignments, executives need a deep understanding of the culture and social patterns of behavior of the host country. That is why this study sought to better understand the CCT's impact on trainees' level of adjustment and performance.

There were two theoretical frameworks that guided this study: Bandura's Social Learning Theory and a socio-cultural approach to CCT. Human resource development (HRD) is ideally suited to address individual and organizational needs associated with globalization. The three core theory domains, psychological, economic, and system, proposed by Swanson and Holton (2001) seem to fall short on accounting for the socio-cultural perspective of the cross-cultural issue and its implications. Thus, besides Bandura's Learning Theory, a socio-cultural perspective which combines two specific areas of study: social psychology and cultural psychology, was proposed as a second

Theoretical Framework. Viewing HRD practice from a socio-cultural perspective was ideal because it reminds people that their behavior is influenced not only by those around them but also by the particular culture in which they are immersed, and this is particularly relevant to CCT (Ciccarelly & Meyers, 2006).

Finally, it was important to consider the limitations and delimitations mentioned in this study in order to appreciate the findings and properly guide future research.

CHAPTER II

REVIEW OF THE LITERATURE

Introduction

Globalization is rapidly progressing in today's world economy. In the process of becoming global, more and more organizations are hiring new employees of varying cultural backgrounds. Thus, organizations are faced with new challenges such as crossing cultural boundaries. Companies which have been successful in their own countries fail in the global marketplace due in most part to their lack of intercultural awareness. When sent abroad, executives must know about important issues in the working and social environment which will allow them to perform effectively and appropriately during the multicultural interaction. CCT has been considered a tool to promote effective cross-cultural interactions and to help executives better adapt to the host country.

Thus, the topic of this study was to explore the impact of CCT on executives' socio-cultural adjustment and performance during international assignments. Therefore, the areas of literature reviewed were as follows: HRD and Globalization, Bandura's Social Learning Theory, Maslow's Hierarchy of Needs, and HRD and Cross-Cultural Training.

Globalization

Globalization is the process of increasing social, cultural, political, and economic interdependence that has resulted in several changes in the business environment. Global market opportunities and threats are major effects of globalization (Thoumrungroje, 2004).

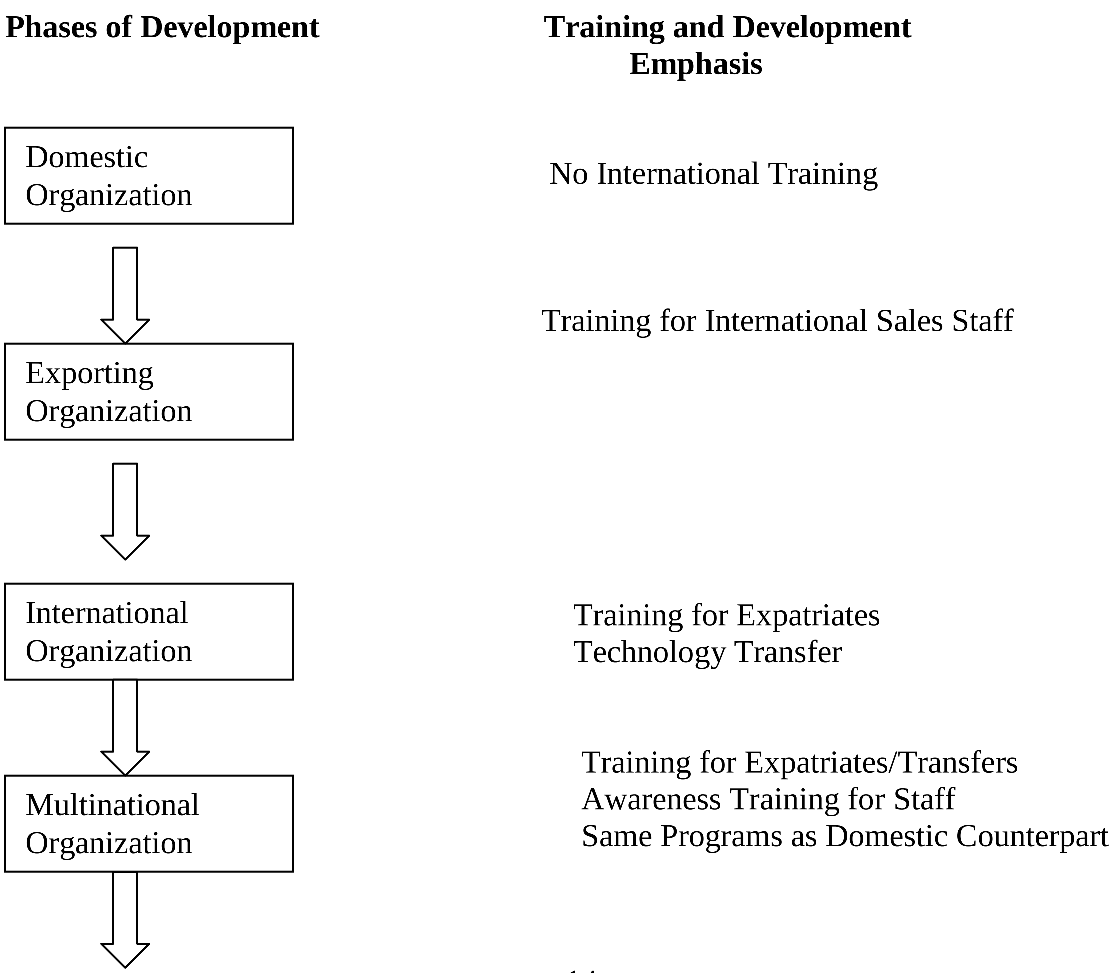
Swanson and Holton (2001) stated that economics has always been a driving force behind globalization and that in order to keep up with it, a systematic response is required. They explained that there are two approaches to consider to economics and globalization. The first approach believes that individuals need to have the freedom to pursue their own interest and that by doing this, they will ultimately serve the common good. The other approach explains that a person is not free until he/she is economically free, and that the way people accomplish economic freedom is through intellectual freedom. These two approaches to view globalization and economics: 1) leaving people alone, (freedom), or 2) working hard and smart to make money (wealth), are not supported by everyone (Swanson & Holton, 2001). The main reason for this discrepancy is that globalization does not have the same effect in all countries and/or people.

Globalization, Technology and Relocation

Globalization intertwines trends which have to do with an international movement of money, information, people, and technology. All these factors are accompanied by organizational growth and change as corporations adapt their legal systems and their infrastructures to allow this movement to take place. One of the most influential factors regarding globalization is technology. In his book, Friedman (2006) stated that globalization "is about the global market, but it is also about the Internet and Google" (p. 510). Technology has changed the way we communicate. The mass media has provided instant information from opposite sides of the globe. Electronic media puts us in touch with everyone everywhere instantaneously bringing us all together "as members of a single global village" (McLuhan, 1964, as cited in Griffin, 2000, p. 318).

Domestic and Global HRD

Phillips (1999) stated that “globalization is actually a progressive process through which an organization becomes totally integrated in all of its processes as it develops, manufactures, or produces products and services and delivers them throughout the globe” (p. 326). With it, he explained that a company typically goes through phases of development beginning as a domestic organization and progressing towards becoming a global organization. There are five phases of development: 1) Domestic Organization, 2) Exporting Organization, 3) International Organization, 4) Multinational Organization, and 5) Global Organization with its correspondent Training and Development Programs.



Global Organization

Global HRD Strategy
Customized Programs for Each Culture

Figure 1. The Evolution of a Global Organization and Training and Development (Phillips, 1999)

Some of the organizations that have progressed through this evolution are IBM, G.E., McDonald’s, Ford, Shell, Sony, Philips, NCR and Unilever among others (Phillips, 1999).

Marquardt and Engel (1993) listed 10 factors that differentiate between domestic HRD and global HRD: 1) The participants’ origins, which vary from local/host country nationals to expatriates and third-country nationals; 2) Culture, which will varies from country to country and even within regions of the same country; 3) Administration, which depends on the originating and host country and how administrative issues along with practices and policies are handled; 4) Learning styles, which depend on the educational system of the country; 5) Physical and financial resources, which determine the availability or not of the use of various resources; 6) Environment, which reflects economic, political, and social issues; 7) Distance , which is related to participants’ location and proximity; 8) Role of trainers, which changes from country to country reflecting the correspondent culture; 9) Language, which constitutes the most significant difference and also varies from country to country; and 10) Designers, who work together with local instructors.

Looking at these factors of differentiation, it can be deduced that to go from domestic Training and Development to a globalized HRD, a complete redesign is necessary. To compete globally, HRD must respond to important issues, such as the connection between training functions and goals of the global organization, and also issues that might represent barriers such as cultural differences as soon as they are evident. To decide the most appropriate approach for Training and Developing practices, it is very important to clearly differentiate between global and domestic organization. Successful domestic HRD does not necessarily mean inherent success in the handling of global HRD. Phillips (1999) not only highlighted the importance of differentiating between them both, but more importantly stressed the necessity of adopting the necessary steps to truly become a global HRD.

HRD Global Trends: Global Training, Programs, Needs, Causes and Drivers

Marquardt (1995) stated that "Political and economic freedom have proven to be essential to the development of any society, but human resource development is critical in building on these opportunities" (p. vi). Contrary to what many HRD professionals believe, globalization has led to a better world in which greater numbers of people have the opportunity for peace, prosperity and freedom (Marquant, 1995). Thus, many companies today operate in a global marketplace. The global marketplace means that companies are in one way or another involved in an intercultural exchange, in which they must prepare its executives for international assignments.

Mobility and Globalization

The 2005 Global Relocation Trends Survey Report showed a close relationship between globalization, technology, and relocation trends. Globalization places an important role on providing the means for the increasing demand for human resource mobility, a mobility that has been facilitated by the means of new technologies.

According to the *Survey Report* (2005), companies generate 43% of revenues outside their home countries; “consequently, it is not surprising that we are beginning to see worldwide consistency in employee expectations and demands as a result of the global dissemination of human resource policies, practices, concepts, and solutions” (¶ 1). Little by little, researchers in HRD are beginning to function globally. Proof of that is:

> The shared vision among members for leading the profession through research, respect for inquiry, and openness in participation that has resulted in a global presence [among others] of four journals: *Advances in Developing Human Resources* (topical issues; theory and practice), *Human Resource Development Quarterly* (research), *Human Resource Development International* (international research forum), and *Human Resource Development Review* (theory research). (Swanson & Holton, 2001, p. 382).

The global trend has brought with it the need for developing global programs and CCTs. Phillips (1999) mentioned five major issues that affect this global trend: 1) The influence of the market which pushes the localized economy to become global; 2) The disastrous results of the one-program-fits-all philosophy; 3) The need to develop training needs assessment that truly reflects different needs from country to country; 4) The need to provide training, design, development, and delivery of the programs by locals, and 5) The urgency of matching these programs with the place where they will be put into practice; in other words, the need for realistic and relevant programs.

Globalization and Relocation

The 2006 Global Relocation Trend Survey reported that “reversing a steady decline since the 1998 survey, 47 percent of companies questioned for the new survey reported an increase in the size of their current expatriate population last year [2005] compared to 31 percent in 2004 . . . while 54 percent anticipated additional growth in the coming year” (¶ 16). Today, more and more companies operate in a global marketplace. The global marketplace means that companies are in one way or another involved in a multicultural exchange, which requires intercultural communication. Thus, in order to be successful, companies “must design products to fit a wide diversity of cultures, advertise them in numerous languages, and meet the demands of very different consumers” (Rogers & Steinfatt, 2000, p. 258). Being successful in one’s own country, it does not guaranty success abroad. Thus, the role of CCT becomes increasingly significant to help expatriates smoothly transit the process of learning the host culture and effectively adjust to it.

The cost that companies must pay when relocating exceeds $1 million per assignee and per assignment. This represents the total cost to U.S. multinational corporations (MNCs) of about $75 billion a year (Copeland & Griggs, 1985; Sheridan, 1998, as cited in McNulty & Tharenou, 2005). Choosing the right candidate is crucial for a successful international assignment.

Bandura's Social Learning Theory and Other Domains

Three-Core Theory Domains

Weinberger (1998, as cited in Swanson & Holton, 2001) explained there is great overlap and interdependence when it comes to theoretical domains in HRD. Theoretical domains include system thinking as part of learning, organizational performance, and economic theory.

Although there is no universal view or agreement on a theory to support HRD as a discipline, three complementary theories may be considered as a foundation in the discipline of HRD. These three core theory domains are psychological, economic, and system (Swanson & Holton, 2001, p. 92). These theory domains have been visually represented as a "three-legged stool with three legs providing great stability for HRD as a discipline and field of practice" (Swanson & Holton, 2001, p. 93). Furthermore, the stool has been positioned on an ethical rug, which plays an important role in moderating issues such as international ones, which might be viewed from different perspectives according to the cross-cultural background of the trainer. Swanson and Holton (2001) explained that due to the global economy and free market condition, it is important to mention how ethics will play an essential role by moderating or being a "filter between . . . [the] three theories and the context in which HRD functions" (p. 93).

Socio-Cultural Perspective of HRD

Although these three core theories are recognized as a possible theoretical framework for HRD, Holton (as cited in Swanson & Holton, 2001) has some concerns whether the psychological theory, together with system theory and economic theory, "provide adequate theory to account for individuals within the social system of organizations" (p. 104). Thus, viewing HRD from a broad psychological perspective may not be as useful as viewing HRD from a socio-cultural perspective. The socio-cultural perspective is a combination of two specific areas of study: social psychology and cultural psychology. Social psychology is the study of how a person's behavior, thoughts and feelings are influenced by others. Cultural psychology is the study of cultural norms, values, and expectations (Ciccarelli & Meyers, 2006). Viewing HRD practice from a socio-cultural perspective is ideal because it reminds people that their behavior is influenced not only by those around them, but also by the particular culture in which they are immersed (Carioni & Mucenic, 2007). This may be particularly relevant to CCT because the distinctive aspect about human beings is that psychological processes do interact with culture and idiosyncratic learning (D'Andrade, 1986).

Bandura's Social Learning Theory

Social Learning perfectly applies to expatriates when leaving their home country and dealing with the new culture in the host country. That is why I proposed as a theoretical framework Bandura's (1977) Social Learning Theory. Bandura "has developed the most elaborate system of thought on imitation, identification, or modeling as concepts of teaching" (Knowles, Holton & Swanson, 2005, p. 103). Black and Mendenhall (1990) emphasized a philosophy in which expatriates' intercultural adjustments are enhanced due to an emphasis on the multidimensional approaches in training. During this encounter, trainers identify their own and the trainees' strengths which are ultimately enhanced in the intercultural exchange.

Psychological and Sociological Approaches

Besides using Bandura's (1977) Social Learning as the theoretical framework for CCT, I also emphasized the importance of bringing together the psychological and sociological aspects of CCT. In other words, there is much more to consider than just selecting Bandura's (1977) Social Learning as the Theoretical Framework for CCT. CCT involves much more than the aspect of social learning. It involves demographics, learning styles of the trainees, and also the trainer's style, demographics and proficiency.

With this in mind, a theoretical model should be created to anticipate cross-cultural trainees' behaviors and performance. In doing so, the HRD practitioner may be better able to deliver a more effective CCT. My belief is that HRD practitioners in multicultural organizations and cross-cultural trainers should concentrate on the trainees as individuals, together with the flexibility of the training's content and delivery. The psychological, sociological and social aspects combined might set the basis for a comprehensive Theoretical Framework.

Specific Learning Strategies for Cross-Cultural Settings

Therefore, the most executives can do to maintain effective international behavior and deal with cultural changes and learn from the change process is to develop an empathic understanding. Foster (1995) explained that "to understand other people empathetically is to be in sympathy with them, to comprehend their needs and motives almost as well as if they were your own" (p.12). Ascalon (2004) explained two underlying dimensions: empathy and ethnocentrism. Under this approach executives acknowledge others' values, but still maintain their own. The ultimate goal is to conduct successful negotiation abroad; therefore, it is fundamental to avoid differences that might get in the way of negotiation. Multinational companies must develop and maintain a particular “culture” in which the back and forth of executives is an everyday practice. In order to be successful when dealing with this distinctive aspect of multinationals, companies must develop and maintain certain characteristics which keep them successfully competitive within the global market.

Maslow’s Hierarchy of Needs

Assumptions, Levels and Premises

Maslow’s (1970) assumptions are that: 1) All individuals have the same basic needs; 2) These needs direct our behavior; and 3) These needs are organized in a hierarchy or steps. He recognized five levels: Level I, Physiological or Survival Needs; Level II, Safety or Security Needs; Level III, Belonging, Love or Social Needs; Level IV, Esteem or Recognition/Status Needs; Level V, Self-Actualization.

Maslow's Hierarchy of Needs is shown above. The pyramid illustrates the five levels of human needs. The most basic are physiological and safety/security, shown at the base of the pyramid. As one moves to higher levels of the pyramid, the needs become more complex.

Figure 2. Maslow's Hierarchy of Need Pyramid, 1970

These five levels are classified as lower order needs and higher order needs. Survival and security needs (Levels I and II) are considered lower order needs. In one of his premises, Maslow (1970) explained that these basic needs must be satisfied before moving to higher levels. Only after these needs are satisfied will higher order needs develop. Higher order or growth needs are Social, Recognition and Self-fulfillment needs (Maslow, 1970). Higher order needs are particularly predominant in people who have already arrived at certain levels of functioning in life. Their basic needs (Levels I and II) have already been taken care of, so they have the ability, willingness, and predisposition to move to a higher order of needs. Among this group of people are executives, and of course executives sent abroad are no exception. Expatriates are the perfect example of the way Maslow's pyramid functions.

When these executives are transferred to a new country, all their basic needs are well taken care of. They are provided with all the material things such as housing, transportation, and all of the necessary services (amenities) to make them and their families comfortable and happy. So, as mentioned previously, Levels I and II are covered.

Interestingly enough, Levels IV and V (esteem and self-actualization) will be easily satisfied only if Level III needs (belonging or social) are addressed appropriately. In other words, these executives are transferred because they are good at what they do. They are well recognized and hold a very high status within the company (Level IV). Furthermore, most of them have already taken care of or fulfilled the self-actualization need in their home country. Their cognitive abilities and professional performance have proven they are the person the company needs for that specific international assignment. So, the esteem and recognition needs are not an issue for expatriates. In general, they are people who are well established and recognized even before being relocated. These executives are well respected and regarded as experts in their assignments. However, once they are immersed into the host country, they might notice changes concerning their self-esteem and self-fulfillment levels of needs. Suddenly, many of them may start experiencing a weakening in their ability to position themselves adequately in the host culture, which will produce increased feelings of uncertainty that will start to affect negatively their social and professional life. One of the main reasons why executives start weakening in their feelings of competence is that the social need (Level III) has not been fulfilled. What happens in many cases is that even though these executives are very competent in what they do professionally, they do not necessarily feel the same way abroad when it comes to dealing with everyday domestic issues that are part of everyday living. In many cases these feelings of uncertainty and failure to adjust are the direct result of poor CCT or the absence of the training altogether. The uncertainty and lack of adjustment that many expatriates experience are, in many cases, the direct result of an ineffective CCT which has failed to provide enough information to make them feel adjusted and that they belong.

Level III, Belonging or social need in Maslow's (1970) Hierarchy of Needs, is the main reason for this study. A person with an unattended need to belong may not accomplish much if he/she feels isolated, not accepted, and unable to participate with co-workers and nationals' social activities. It does not matter how much recognition that person might receive: the need for belonging is an important one that must be satisfied if the process of esteem and self actualization is to take place (Maslow, 1970). Regardless of how much pride and recognition expatriates have received in the past, if the need to belong and socialize are not satisfied first, they might not accomplish and might exhibit unexpected poor performance due to the lack of adjustment and poor interaction with nationals.

Cultural Value and Preferences

Evidence suggests that there are key demographic characteristics such as age, gender, race, and socioeconomic status that contribute to differences that ultimately will affect the formation of social identity and its correspondent values. These factors will determine the characteristics of in-group and out-group formation and how cultural value dimensions impact social identity characteristics (Schaffer, 2006). Schaffer (2006) explained that there are principles of social identity and self-categorization theories from which executives, and employees in general, will see themselves as similar or dissimilar to others according to each person's values. In other words, they will see themselves as belonging to an in-group or an out-group. This interpretation will guide them to make a decision that consequently will place them in one or another group. By making that decision and arriving at that selection, they are differentiating themselves from the qualities or characteristics of other groups. When individuals make social comparisons in their environments, they first need to define themselves along some social criterion (Tajfel, 1974; Turner, 1975, as cited in Schaffer, 2006).

When executives are working on overseas assignments, things get more complicated. In order to make the social group selections and feel comfortable with it, expatriates need to know to what extent their value system is congruent with the value system in which they are immersed. Even though it is not expected that expatriates will change their values, it will be expected that they will have a preference towards certain social issues that they will be presented with. Here is where the importance of CCT reveals itself. When executives undergo an intensive and effective CCT, they will have enough information and more importantly confidence to select whatever makes them feel comfortable without feeling awkward or out of place if compared with the rest of their co-workers or nationals.

Maslow: Cultural Values and Needs

Rokeach (1979) discussed the relationship between values and needs by saying "values are the cognitive representations and transformation of needs, and man is the only animal capable of such representations and transformations" (p. 20). In his book he also explained that in order to understand values it is important to understand the relationship to needs. Basically, he stated that people have the freedom to choose for themselves how to respond when presented with different situations. People base these responses on their personal values which are personal beliefs about what is or is not important in life.

Based on Maslow's (1970) Hierarchy of Needs, Rokeach (1979) proposed an interesting relationship between needs and values. Rokeach explained that physiological, safety, social, esteem, and self-actualization needs are intrinsically related to equivalent values which are survival, security, belonging, recognition, and personal growth. Once the basic needs, physiological and safety, are taken care of, people move to a higher level of needs (esteem and self actualization) in which they are faced with the dilemma of choice. Ultimately, the way people resolve this dilemma has to do with their personal system values. Consequently, values influence people's preferences in the way in which they satisfy their needs. This is of utmost importance when expatriates are relocated because they must decide the appropriate route to satisfy their needs without antagonizing or disappointing co-workers and nationals.

Hofstede (1980) stated that values are the main elements of culture and can be defined as "broad tendencies to prefer certain states of affairs over others" (p. 43). These preferences in the different levels of depth in which values are located are important to know to deeply understand the way people in general and employees, in particular expatriates, relate to each other and to nationals. These preferences and the way executives go about satisfying their needs when on international assignments might show that there are certain limitations to consider when applying Maslow's (1970) Hierarchy of Needs in Cross-Cultural settings.

Limitations of Maslow's Theory in Cross-Cultural Settings

Cultural values, needs and preferences are not separable from cross-cultural environments. On the contrary, in many cases values, needs and preferences intertwine and present themselves as the immediate response to the environment where the expatriate is relocated. To better understand this, Yang (2002) explained that in Cross-Cultural settings, there are two major psychological cultural patterns which vary: collectivism and individualism. People organized in collectivist cultures give more importance to in-group goals. In cultures such as in Africa, Asia, Latin America and in parts of Europe, people's "beliefs, attitudes, norms and values are organized around one or more collectives such as the family, the tribe, the religious group, or the country" (¶ 3). On the other hand, in individualistic cultures, individuals' experiences are structured around autonomous individuals. "People and individualistic culture tend to give priority to their personal goals, even when these goals conflict with the goals of important in-groups" (¶ 6). Examples of these cultures are the United States, Germany, and France, just to mention a few. Thus, Maslow's (1970) esteem and self actualization needs which are in nature very personal and individualistic do not apply the same in all cultures. These same needs, esteem and self-actualization in collectivist cultures, are intrinsic in relation to the group, community or the nation where they belong. Therefore, people will satisfy these needs accordingly: in the case of collectivist cultures, they will first place the needs of the community as a group and later apply theirs, something that will rarely happen in an individualistic culture. Thus it is important to highlight that Maslow's Hierarchy of Needs is limited when applied in cross-cultural settings.

The way these needs are going to be satisfied or taken care is not independent of the environment where the person is immersed. Thus, if an expatriate is coming from an individualistic culture and is working in a collectivistic culture, there will be certain adjustments necessary to avoid misunderstanding and speed the process of socialization. Here is where Cultural Intelligence (CQ) plays an important role.

Cultural Intelligence (CQ)

Cultural patterns in the working environment are always a reflection of cultural patterns in the bigger dimension of society. As mentioned previously, there is a strong relationship between values, needs, preferences, and the way these factors present themselves within particular cultures. When delivering Cross-Cultural Training, it will be naive to expect that trainees or expatriates will end up knowing every single detail about the host culture. It will be also unethical to ask them to change or vary their personal values to better adapt and quickly adjust to the country where they are to be relocated. However, it is possible to train expatriates with a broader approach to culture in general in which they will be able to exercise Cultural Intelligence (CQ).

Earley and Mosakowsky (2004) defined CQ as the ability to effectively understand unfamiliar corporate and social contexts and then be able to adjust. They emphasized the importance of adopting a CQ in an increasing trend of globalization. When executives are sent abroad on international assignments they face verbal, non-verbal, and social patterns of behavior intrinsic to the host culture. Many of these executives, the ones who underwent an effective CCT, will be able to adjust and interact successfully with co-workers and nationals in an expected period of time. Others, the ones who have not received a CCT or have received a poor training, might be destined to fail. Earley and Mosakowsy (2004) stated that in general, any person who is practically alert, motivated, willing and able can easily develop and maintain a CQ. Alertness, motivation, willingness and ability are traits commonly present in expatriates. So, it should be considerably productive during a CCT to stress the importance of developing and maintaining a CQ so executives will interact effectively while in international assignments.

HRD: Cross-Cultural Training

Cross-Cultural Training: Importance

In their book, Knowles, Holton, and Swanson (2005) stated that "training and development has grown dramatically during the past three decades. It has become a $30 billon profession" (p. 297). Due to globalization, CCT has become increasingly important in the area of human resource development. More and more, organizations eager to compete in the international market find themselves challenged by the need to provide effective CCT.

Cross-Cultural Training has been considered a tool to promote effective cross-cultural interactions. Thus, more and more international companies immersed in the global market are evaluating to what extent this training provides to help expatriates to better adapt to the new country. Thus, “the role of cross cultural training becomes increasingly crucial” (Bhagat & Ptien, 1996, as cited by Osman-Gani, 2005, p. 46).

In their article, Littrell et. al. (2006) defined CCT “as the educative processes used to improve intercultural learning via the development of the cognitive, affective, and behavioral competencies needed for successful interactions in diverse cultures (Landis & Brislin, 1996; Morris & Robie, 2001). They also explained that today organizations are incorporating tools and ideologies from CCT into domestic training such as multicultural training. Multicultural training is used domestically in companies to improve cultural awareness of domestic employees and make the interaction among employees with different cultural backgrounds easier.

There is an extremely high cost associated with a long-term assignment or relocation of an employee sent abroad by corporations per year (Boyacigiller, 2000; Cendant 2002, 2004; Kobrin 1988; KPMG International 2003; Mercer Human Resource Consulting 2003, as cited in McNulty & Tharenou, 2005). The cost that companies must pay exceeds $1 million per assignee and per assignment. This represents the total cost to U.S. multinational corporations (MNCs) of about $75 billion a year (Copeland & Griggs (1985), Sheridan (1998), as cited in McNulty & Tharenou, 2005).

Purpose, Goals, and Components of CCT Programs

As indicated previously there are certain components researchers have identified as indicative of successful CCT. The idea is that CCT provide expatriates with the necessary knowledge and ability to effectively perform at the business level and socially adjust to produce successful interactions. Thus, CCT should provide the necessary components to address personal adjustment to the new host environment, professional effectiveness in accomplishing business responsibilities, and interpersonal adjustment (Baumgarten, 1995; Bennet et al., 2000, as cited in Littrell et al., 2006).

To fulfill these components of successful and effective CCT programs, there are clear goals to be obtained, i.e., to prepare expatriates to learn how to learn, to make isomorphic attributions, to overcome or to cope with difficulties that might arise as a result of new and stressful situations regarding host national behavior, and to develop in general positive relationships with host nationals (Littrell et. al., 2006).

The first goal, learning how to learn, is considered the most important goal of CCT because the CCT cannot prepare every single expatriate for every thinkable situation presented in the host country. In other words, by teaching expatriates to learn how to learn, they are trained on how to learn and acquire the necessary information about the new culture which later on will give them the necessary knowledge to assess new situations and respond accordingly (Bennett, 1986). The second goal, enabling the expatriate with the knowledge required to make isomorphic attributions regarding host national behavior, has to do with enabling the expatriate with the ability to make the same judgment regarding behavior as host nationals do. This is important because many times expatriates make incorrect attributions regarding meaning or intentions of the host national behavior bringing as a result conflict (Littrell et al., 2006).

There are also program component that seem to be related to the success or failure of the program training. Aspects such as the needs of the expatriate, the content of the design, and the quality of the program need to be taken into account in order to administer successful CCT programs. For instance, needs assessment must be conducted in order to retrieve information not only on the interpersonal, cognitive and self-maintenance skills of the expatriates but also on aspects such as the expatriates' family needs and interests, possible past international experiences, and so on. The other component, customizing of the training, needs to match the needs with regard to the expatriates' skill developmental (Littrell, et al., 2006).

The quality of the program has to do with the quality of the expertise held by the people delivering the training. They not only need to be experts on the country of destination but also they need to know the process of expatriation in general (Bennet et al., 2000 as cited in Littrell, et al., 2006). The last component of the CCT program should be an element of evaluation of the program in which not only expatriates' performance should be considered but also expatriates' opinions regarding the overall experience of the relation between the way they received the training and their level or readiness to face the new assignment.

Effectiveness of CCT

Recent studies have provided information about the effectiveness of conducting CCT to improve expatriate performance on a foreign assignment, including the positive relationship between adjustment and performance reducing early returns, and enhancing skill development to interact in the new culture and furthermore develop self-confidence and overall feelings of well-being (Black & Mendenhall, 1990 as cited in Littrell, et al., 2006).

CCT and Performance

In spite of abundant information with regard to the effectiveness of conducting CCT to improve expatriate performance and speed adjustment, Baiyin, et al., (2006) explained that "Despite their potential influences on Cross-cultural Training process and outcomes cultural and cultural difference have not been featured prominently in the literature" (p. 10-2). Researchers believe that there are many factors potentially moderating the relationship between CCT and expatriate performance. These factors are explained as follows.

Design of the CCT

As mentioned previously, when organizations decide to expand globally, a truly global HRD shift is necessary in which the current strategy needs to be redesigned.

Thus, Phillips (1999) proposes a frame-work for developing global programs. His framework consists of 10 steps: 1) conduct needs assessment and analysis, 2) develop objectives, 3) determine evaluation strategy, 4) determine program content, 5) select delivery methods, 6) develop or select materials, 7) implement or conduct program, 8) evaluate program, 9) communicate results, 10) make adjustments. In each step the culture, language, learning style and practices of the region must be taken into account. . Even though this is a framework proposed for global training and development in general, there are a few aspects worth mentioning which will add to CCT programs. Among the 10 steps Phillips proposed, there are 3 which need special attention: design, analysis, and delivery methods. The reason why these three are of special attention is because of the cultural differences surrounding the environment where the training is to be administered. For example, in regard to the delivery aspect of the training, lectures are generally considered the least effective way of trainings; however, some countries prefer them.

Delivery and Training Content

Traditionally there have been two approaches to training delivery: didactic, which consists of information giving, and experiential learning activities. Nowadays, there have been identified seven approaches to CCT: attribution, culture awareness, cognitive-behavior modification, interaction, language, didactic, and experiential training (Befus, 1988; Bennett, 1986, as cited in Littrell et. al., 2006). Among these approaches the two most common didactic training techniques are cultural assimilators, and informal briefings. Informal briefings consist of casual conversations with recently returned expatriates, structured information sessions with experts, host country nationals, and former expatriates (Brewster, 1995; Kealey & Protheroe, 1996, as cited in Littrell et. al., 2006).

In his study, Osman-Gani (2005) found that overseas acquaintance trips, cultural sensitivity training, culture assimilator/immersion and cultural orientation programs together with language training are of the greatest impact to better increase performance in overseas assignments and raise expatriates' level of adjustment. Cultural assimilator is a didactic training delivery in which expatriates read a cross-cultural oriented scenario, in which special critical incidents accompany a list of focus options that are alternatives that would represent the action they would be more likely to adopt. After the expatriate has chosen his/her answer, an expert provides the answer which matches the most appropriate response which is realistic to the cross-cultural situation in which the expatriate is immersed (Littrell et. al., 2006). By doing this, executives reduce this uncertainty and increase their confidence to feel adjusted to the new culture.

In regard to the training delivery, Osman-Gani (2005) found that on-the-job training and self –instructional training are effective methodologies which help expatriates to improve their adjustment. Training methods which expatriates dislike the most were the lecture-classroom training, workshop and case study. The reason might be because nowadays information regarding culture and work environment is available in the Internet providing expatriates the opportunity to learn by themselves and at their own convenient time and pace (Osma-Gani, 2006). In spite of this preference, the *2003/2004 Survey* revealed that only 16% of the participants companies in the survey used CD-based or web-based cross-cultural programs. Of those who used them, 86% rated them as having high or medium value.

What Osman-Gani (2005) did find was a significant difference when comparing responses of expatriates of different genders, age groups, marital status, educational background and management levels, which indicate that expatriates' demographics should be taken into consideration when designing and implementing cross-cultural training programs.

Timing/Training Duration

Timing is another moderating effect of the CCT. Literature reveals those who favor pre-departure training and those who favor post-arrival training. Both have explained reasons to be the most effective in doing the job of preparing executives for success. The ones who favor pre-departure argue that with pre-departure training on business practices, cultural differences, and living conditions, expatriates can better have a realistic expectation of the host culture. When expatriates hold realistic expectations this increases the possibility of meeting or exceeding expectations, promoting an anticipatory adjustment that will enhance actual adjustment (Caligiuri et al., 2001, as cited in Littrell et al., 2006).

Those who favor post-arrival training argue that training programs can address real-time issues, those issues that are prompted to happen in the actual setting of the host country. The idea is that once expatriates are working, they can bring concrete concerns or challenges from situations they are currently experiencing and the post-arrival training would help them resolve the issue (Bennet et al., 2000).

Both arguments are valid and legitimate; for that reason, new ideas have arisen where CCT has emerged combining both methods: pre-arrival and post-arrival training. Researchers have warned that even though the idea is good, this is a new model and should be used cautiously because it has not yet been empirically validated (Selmer, 2001; Selmer et al., 1998, as cited in Littrell et al., 2006).

There are different kinds of international assignments: traditional long-term assignments, short-term assignments (6 months to 1 year), localized transfers, and extended business travel (Littrell, et. al. 2006). Companies participating in the *2003/2004 Survey* indicated that 70% of the assignments were for 1 year or less in duration, and only 19% were for 3 years or more. The past historical average for assignments of 1 year or less was 13%. Although this change reflects a shift away from permanent and long-term assignments toward shorter ones, the shift was more pronounced among small companies (p.30)

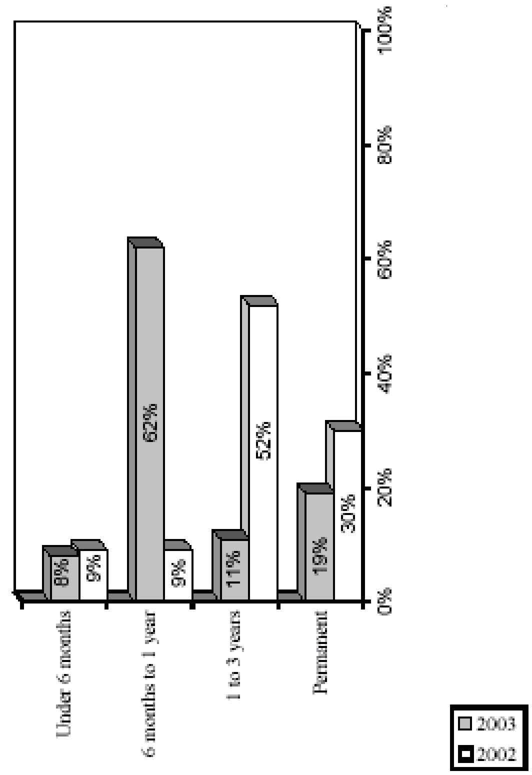


Figure 3 Adapted from 2003-2004 GMAC – NFTC – SHRM Global p.30

Cultural Toughness and Training Rigor

Training toughness is another moderating factor of CCT. It refers to the fact that in some countries it is more difficult to adjust than in other countries. Littrell et al. (2006) explained that it is very different for an American expatriate to be assigned to London as to be assigned to Africa. Researchers have also developed ranking of cultural toughness for various countries. The different levels of toughness will determine the toughness or training rigor that the expatriates need to go through in order to successfully adjust to the new culture. Training rigor is the degree of mental involvement and effort that must be expended for the trainee to learn the training materials (Black et al., 1992, as cited in Littrell et al., 2006). Training rigor is not only the method used for the delivery of the training but also the time spent. For example, it is considered that a low training rigor goes from 4 to 20 hours including techniques such as lectures, films and books, whereas a high training rigor averages 60 to 180 hours in which field trips, in-depth role plays, case studies, and assimilators are included (Black et al., 1992). Littrell et al. (2006) stated that training rigor may moderate the relationship between CCT and expatriate performance in the sense that toughness of the training programs had more substantial and longer lasting effects on expatriate performance.

Training Providers

In his study Osman-Gani (2005) found that training provided by host-country/subsidiary personnel has the largest impact on expatriate self-efficacy than training provided by outside professional consultants. This might be attributable to the closer relationship that the company personnel have with expatriates and the better understanding of the local situations whereas with professional consultants, there is a tendency to see them as more distant. Thus, training provided internally is more effective on improving self-efficacy and general adjustment in comparison with training provided by external parties.

Training Program and Acculturation Process

In their paper Cseh and Coningham ((2006) explained that there are not commonly accepted techniques for consulting internationally. They mentioned Smith's

(1995) potential barrier to successful international consultations, which is explained as a tendency to see our behavior as normal and others as abnormal and a difficulty to see how our culture affects our behavior (culture blindness).

Phillips (1999) explained that before going global and having the need to provide CCT programs for expatriates, trainers need to acculturate various program components before implementing them in other cultures. There is a checklist of 15 points to consider. Following are the ones more pertinent to CCT programs and acculturation: Are the program's situations, examples, and case studies realistic and appropriate for the target culture? Have the facilitators been prepared for the target culture and participants' role expectations? Have the styles and values of facilitators from various cultures been integrated? Have learning methodologies been adjusted for participants from cultures that do not use certain ways of instructions –for example, experiential vs. didactic, or learner-centered vs. teacher-centered? Will objective evaluative data be collected from cultural groups that are "indirect" or uncomfortable critiquing superiors? (pp. 339-340).

Instructional Approach

Knowles et al. (2005) explained that the selection of instructional approaches depends on different factors such as conditions of learning, content, and demographics or characteristics of the students. An important aspect to consider before selecting the instructional design of the program is to take into consideration specific needs of these Cross-cultural trainees who are adult learners. There are specific needs of adult learners that cannot be ignored if the goal is to deliver effective training. For instance, the class or the setting where the CCT is going to take place must be comfortable, not only in the physical aspect, chairs, desks, but also in the sense of psychological factors that might intervene. Trainers must have a clear idea of what are the expatriates' expectations of the training are, and this is because the trainees' self-concept is involved. Also, when that Cross-Cultural Trainers truly serve as facilitators or orchestrate the training, they can have the trainees share their knowledge and have it integrate with new knowledge providing strategies that will allow the transfer of this new learning back to the job (Zemke & Zemke, 1988, as cited in Knowles et al., 2005).

CCT: Adjustment/Self Efficacy

Uncertainty Avoidance Theory / Tolerance of Ambiguity.

Black and Mendenhall (1990), Bandura (1986), Gist, Stevens and Bavette (1996), and Osman-Gani (2000) developed a conceptual framework to identify the effects of CCT on self-efficacy and its effects on the degree of adjustment of the expatriates (as cited in Osman-Gani, 2005). For the Cross-cultural adjustment aspect of their frame, they used Black and Mendenhall's (1990) multidimensional model which identified three dimensions of in-country adjustments: 1) adjustment to work, 2) adjustment to interaction with host national and 3) adjustment to the general non-work environment. The last two, adjustment to interaction with host national and adjustment to the general non-work environment are the aspects of their frame from which I developed my study.

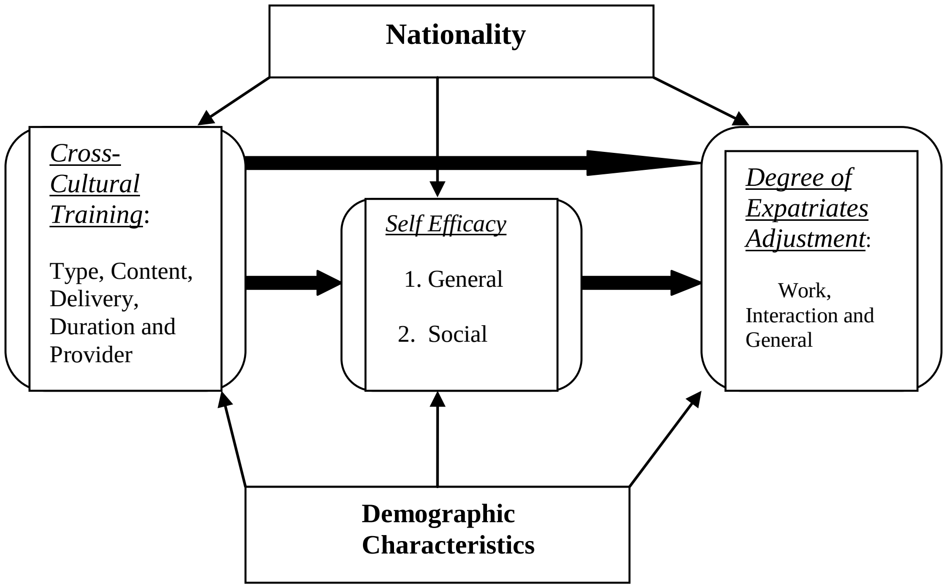


Figure 4 Adapted from Osman-Gani 2005, p.41-3

Osman-Gani (2005) stated that his exploratory study "only studied the relationship between the three variables (CCT, self-efficacy and expatriate adjustment), but the impact of the relationships among the variables on expatriates' performance level could be studied in [the] future" (¶ 37). And this is precisely what I intend to do. There is a direct connection between expatriates' level of adjustment in the host culture and the effect on his/her work performance.

In his study, Osman-Gani (2000) has found that there is a significant relationship between certain aspects of CCT and the expatriates' degree of self-efficacy and adjustment in overseas assignments. He conducted his study focusing on types of CCT programs, Training contents, training delivery methods, training duration, and training providers. In general, he found that as a result of well designed and planned CCTs, the higher the self-efficacy of the expatriates, the better will be the adjustments in international assignments.

On the types of CCT programs, Osman-Gani (2000) found that expatriates preferred cultural training over other types of training for their international assignments. About training contents, socio-cultural issues were the ones expatriates preferred. In regard to training delivery methods, Osman-Gani (2000) found that on-site training and self-instructional training are the most effective, whereas lecture/classroom training, workshop/seminar and case-study/video system were the ones expatriates preferred the less. Between 2 to 4 weeks was found to be the most effective length for training duration or training intensity. With regard to the providers of trainings, it was found that in-house training providers and also host-country/subsidiary personnel were preferred over outside professional consultants.

Demographics also played an important role since some significant differences were found comparing expatriates of different genders, age groups, marital status, education, background, and management levels.

In another interesting study, Yang, Wang and Drewry (2006) explained that since CCT involves the parent and host culture, is important to identify and examine the impact of culture on CCT. They also, like Osman-Gani (2005), analyzed three major aspects of training: training contents and methods, selection of trainers/instructors, and trainees' learning styles. They presented a model of impacts of cultural factors on CCT in which they view CCT "as a process that transforms trainees' previous knowledge, skill, and attitude . . . enhancing cross-cultural adjustment and work performance" (¶ 8).

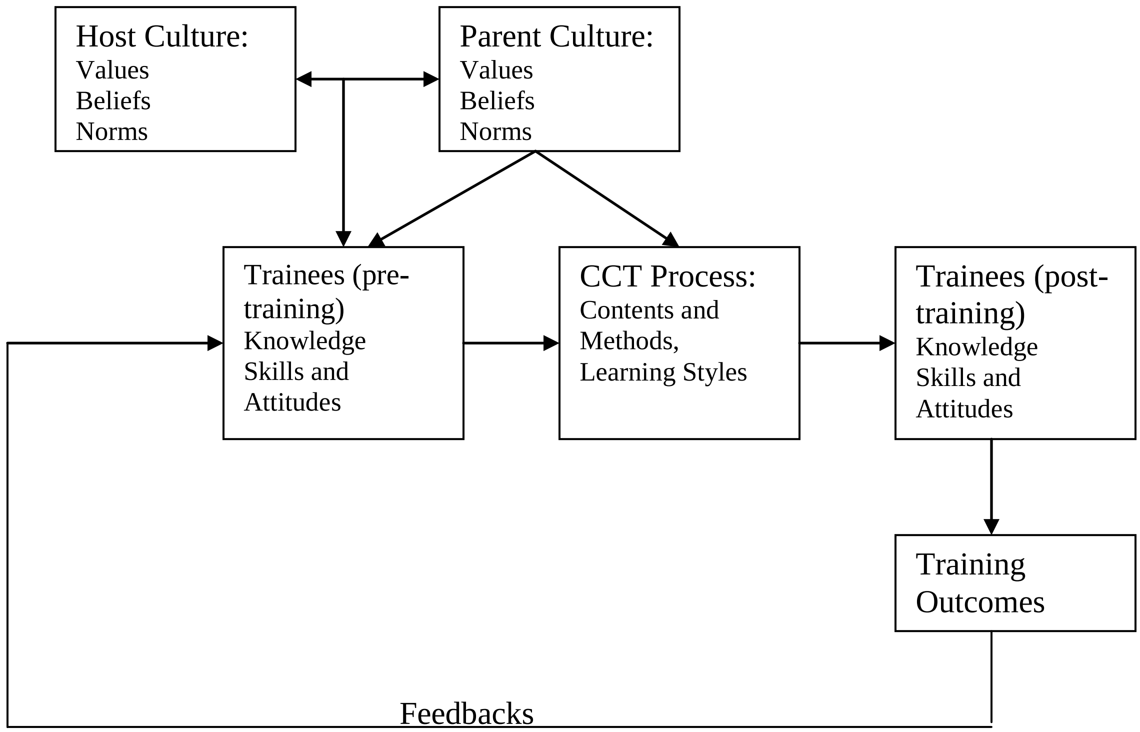


Figure 5 Adapted from Baiyin, Wang & Drewry, 2006, p.10-2

To explain their model, Yang et al (2006) presented 10 propositions which deal with: (1) Training Methods, (2) Training Content, (3) Selection of Trainers/Instructors, (4) Impacts on Trainees, (5) Training Motivation (6) Autonomy and Self-achievement, (7) Uncertainty Avoidance (8) Time Orientation, (9) Culture and Learning Styles, (10) Nature of Knowledge and Learning.

Based on their study, Baiyin, et. al., (2006) proposed a guide to develop effective CCT programs highlighting three main issues. The first aspect to consider is that when selecting candidates for international assignments, human resource managers should be aware of the cultural differences existent between parent and host culture. Second is that trainees not only need to be aware of these cultural differences, but they should be able to effectively explain them so trainees can not only understand but also accept the training content. And third, they emphasized the importance of matching instructional method and training content.

Trainees/Expatriate Turnover

To ensure successful delivery of cross-cultural trainings and guarantee a transfer of knowledge that will ultimately reflect in performance improvement, “the study of behavior, thoughts, and feelings of an individual or interacting individuals and their relationships with larger social units” is required previous to the delivery of the training (Wiggins, Wiggins, & Zanden, 1994, as cited by Swanson & Holton, 2001, p. 17)

CCT is a learning process in which the trainee adapts to a new culture. This process of learning is not only individual but also a social. Thus, trainee learning is a shared activity in which different factors of the immediate culture, such as beliefs, assumptions, social norms and values, play an important role. During training, trainees “will achieve high performance when the training contents are highly relevant to their prior knowledge and skills” (Baiyin, et al, 2006, ¶ 38).

Mezirow (1978) proposed transformation learning, defined as “the social process of construing and appropriating a new or revised interpretation of the meaning of one’s experience as a guide to action” (as cited in Baiyin, et al., 2006, ¶ 40). Furthermore, Shim and Paprock (2002) explained that American expatriates learned the host culture through reflective learning where they examined their own behaviors and assumptions that gained from the parent culture or won experiences” (Baiyin et al., 2006, ¶ 41). Thus, transformation learning and reflective learning are ways in which trainees inquire into their own cultural values and beliefs when faced with new unknown or uncertain issues.

The role of CCT becomes increasingly significant to help expatriates to smoothly transit the process of learning the host culture and effectively adjust to it. Osman-Gani (2006) explained that even though its crucial importance, CCT is not perceived as important by the majority of organizations. One of the reasons why organizations do not offer this type of training is because many still believe that they are ineffective (Baker & Ivancevich, 1971; Mendenhall & Oddou, 1986; Tung, 1981; Black & Gregersen 1999).

In his study, Osman-Gani (2005) has found that between 16 to 40 percent of all expatriate managers (mostly American) return prematurely from their overseas assignments due to their poor performance or failure in cross-cultural adjustment (Baker & Ivancevich, 1971; Tung, 1981; Dunbar & Ehrlich, 1986; Black & Mendenhall, 1989). Expatriate failure or expatriate turnover includes individuals who for one or another reason quit or are transferred back to the U.S. prior to completion of the expected international assignment (Adler 1986; Harvey 1989).

Naumann (1992) stated that the majority of U.S. multinational corporations (MNCs) are affected by a high turnover rate among expatriate managers. He stated that the rate goes from the 20% to 50% for expatriate transfers, and sometimes as high as 70% for some firms operating in less developed countries (Desatnick & Nevvett, 1978, Lanier 1979). More troublesome, he pointed out that expatriate turnover is more evident among U.S. based MNCs than among foreign-based MNCs (Tung, 1982). At the cost of foreign placement estimated at $500,000, it is unquestionable that training for expatriates needs to be improved (Eschbach, Parker & Stoeberl, 2001).

In their study, McNulty and Tharenou (2005) stated that premature return costs an organization between US$50,000 to US$150,000 (Black et al., 1990). The need to prepare expatriates to perform effectively is pivotal. Eschbach, Parker and Stoeberl (2001) found that expatriates with CCT had better levels of interaction adjustment and higher levels of skill development.

As mentioned previously, one of the major determinants in the preparation of executives sent abroad is how well they adjust themselves in the host country. If international companies want to eliminate or decrease the high cost, they must pay for early returns or failures on international assignments due to the lack of adjustment to the new culture, they must acknowledge the importance of these trainings and provide them not only to the executives but also to their families.

Lack of adjustment was found to be one of the most significant factors for early return. CCT is the key factor to facilitate the process of adjustments of overseas assignments. CCTs help executives to better understand cultural differences, but more importantly it provides them (executives) with a smooth transition to adjust to the new country. Cross-Cultural adjustment is defined as the level of psychological comfort which one feels in a foreign environment (Simeon & Fujiu, 2000, as cited in Osman-Gani, 2006). Depending on the specific assignment, executives sent abroad might find themselves in different degrees of contact with the local culture. This encounter might not be similar to the home culture (Tung, 1981). With these encounters, questions such as what is considered acceptable and what is not raise increasing uncertainty among expatriates (Oberg, 1960; Nicholson, 1984; Harrison, 1994).

Reduction of uncertainty is a key factor to adjustment. Berger (2000) explained that uncertainty reduction theory focuses on how humans communicate. He stated that uncertainty reduction is used to gain knowledge and create understanding since "it's natural to have doubts about our ability to predict the outcome of initial encounter" (Berger, as cited in Griffin, 2000, p. 136). According to Adler (2002), in international assignments, expatriates are often exposed to situations in the host country in which they are uncertain of what behaviors are acceptable and what are not. A way to reduce uncertainty is providing intercultural trainings that prepare expatriates for the transition and the consequent adjustment.

There are other non-work factors such as psychological orientation, attitudes towards international living and family-related problems that influence expatriates' level of adjustment. Also, tolerance of ambiguity and willingness to live in foreign environments are other important attitudes determinant in the adjustment process (Oberg, 1960; Brett, 1984; Black & Gregersen, 1991 as cited in Osman-Gani, 2005).

My Study

Rationale

Increasing globalization has caused the need for business executives to function effectively in different cultures. This includes executives being aware of various issues when transferred to foreign countries, and the need to be prepared to adjust to the new culture. Furthermore, they need to be active participants in the process of becoming part of the new culture (socialization process).

This process of preparedness or readiness that expatriates undergo during the CCT allow them to speed the process of adjustment and more rapidly experience the sense of belonging which is so important to adjusting successfully and behaving effectively in a new working and social environment. Such an acquired sense of belonging and feeling of adjustment allows executives to set aside the worries of the technical aspects of communication as part of the socialization process, and focus exclusively on what they are supposed to do: perform at their best during the course of the international assignment.

In fact, lack of adjustment was found to be one of the most significant factors for early return. CCT is the key factor to facilitating and speeding the process of adjustment in overseas assignments. This training helps executives to better understand cultural differences, but more importantly, it provides them with a smooth transition to adjusting to the new country.

The Problem

The importance of CCT is rooted in the particular idea international companies have about the need for the training. Even though most companies provided CCT previous to international departure, there exists a small percentage who indicated that the training was mandatory; for the rest of the companies the Cross-Cultural Training was optional. Companies are still questioning the effectiveness of (or the need for) Cross-

Cultural Trainings as a means to speed and smooth the process of adjustment for executives transferred abroad. In fact, Cross-Cultural Training is the only key to successful understanding and adjustment to a new culture.

Previous research has focused on matching the trainees' cultural backgrounds and learning styles with various instructional methodologies which have been proven particularly beneficial to a secure and effective transition. However more needs to be done to guarantee that the expatriate will be able to speed the process of socialization and adjustment when relocated. The results of such research will offer numerous implications for HRD practitioners and training consultants.

When executives are transferred to a new country, all their basic needs are well taken care of. They are provided with all their material needs such as housing, transportation, and all of the necessary services (amenities) to make them and their families comfortable and happy. Therefore, Maslow's (1970) Levels I and II (Survival Needs and Safety or Security Needs) are covered. Interestingly enough, Levels IV and V (Esteem and Self-Actualization) will be easily satisfied only if Level III Needs (Belonging or Social) are addressed appropriately.

Level III, Belonging or Social Need, in Maslow's (1970) Hierarchy of Needs, is the main reason for this study. A person with an unattended need to belong may not accomplish much if he/she feels isolated, not accepted, and unable to participate in co-workers and nationals' social activities. It does not matter how much recognition that person might have received: the need for belonging is so important that it must be satisfied if the processes of esteem and self actualization are to take place (Maslow, 1970). Regardless of how much pride and recognition expatriates have received in the past, if the need to belong and socialize is not satisfied first, they might not accomplish much and might actually exhibit unexpected poor performance due to the lack of adjustment and poor interaction with nationals. If executives do not perceive the CCT as the stepping point to help them succeed – interacting, adjusting and performing at their best in the new country - the international assignment will be set for failure.

Jones (1977) stated that there is a strong relation between "a person's expectation of success and both the objective probability of success and the effort expended in pursuit of the goal" (¶ 3). Therefore, this study explored lived experiences of the impact of CCT on executives' socio-cultural adjustment (socialization) and performance in the new culture.

CHAPTER III

METHODOLOGY

Introduction

This study sought to explore the impact of CCT on expatriates' socio cultural/belonging level of adjustment and their performance during international assignments. This was a qualitative study, and a purposeful sampling was used for the selection of the participants. The sampling strategy that was used in this study was criterion sampling. The participants of this study were selected based on a pre-established criterion. The data for this study was collected through interviews. The type of interview instrument used was the standardized, open-ended interview. A total of six interviews were anticipated to be conducted one interview per participant. Participants signed the Consent Letter before the interview begun. Notes of the key phrases, major point, and key term, were taken. The interviews were transcribed once each interview was completed. The transcribed interviews were sent to the participants for review; this procedure confirmed if the transcripts truly represent what the participants attempted to say in the interviews. Once all participants confirmed the accuracy of the transcripts, the tapes were destroyed, as required by the IRB. The transcripts will be stored in the researcher's home in a locked file and maintained for 5 years after that, they will be destroyed. The Informed Consent Forms and any documents that may contain participants' identifiers will be filed separately. All data will be destroyed after five years.

The data analysis of this study was conducted according Moustakas' (1994) version of the Stevick-Colaizzi-Keen's method. The gathered data was analyzed through constant comparison; findings were presented according to the research questions.

Philosophical Perspectives

According to Kuhn (1970), paradigms are beliefs, values, and techniques shared by a scientific community constituting also the procedures used to solve specific problems. Paradigms are maps that guide researchers to approach a particular problem in a particular way. Thus, paradigms and axioms are related in that paradigms contain the qualitative researcher's epistemological, ontological, axiological, rhetorical, and methodological ways of knowing; and axioms are the basic beliefs of the researcher. They together constitute the philosophical assumptions of qualitative research (Creswell, 1998).

Philosophical perspectives guide researchers to discover or arrive at the truth and to create knowledge. Researchers, in general, base their research on underlying assumptions. Slife and William (2005) explained that "assumptions refers to the historical roots of a theory as well as the ideas about the world that are necessary for the theory to be true," while implications "refer to the consequences that logically follow if the theory is put into action" (p. 3).These philosophical assumptions are: ontological which refers to the nature of reality; epistemological, concerned with the relationship between the researcher and that being researched; axiological, which asks the role of value; rhetorical, concerned with the language used; and, methodological, which is concerned with the process or research (Creswell, 1998). In research, the researcher's basic beliefs plus values and biases are called axioms that constitute his/her philosophical assumptions and must be discussed openly at the beginning of the study. Assumptions together with implications are the underlying epistemology that guide researchers in their studies and must be taken into consideration since they will definitely affect the way in which individuals arrive at the truth and create knowledge.

Even though there are different methodologies for theory research, researchers in general have a tendency to build their work reflecting their deepest values and assumptions about "what constitutes knowledge (epistemology), the essence of being or existence (ontology), what constitutes value (axiology), and other basic philosophical beliefs" (Swanson, & Holton, 2005, p. 352). In general, the way people see the world is divided into two overarching perspectives consistent with cognitive/modern ways of knowing associated with positivism, and postpositivism and postmodernism, associated with interpretism, social constructivism and hermeneutics.

Postmodernism

Postmodernism is the underlying epistemology chosen to guide the study, because postmodernists believe that people are involved in the creation of their own lives and other people's lives, and that the condition of the world influences them (Patton, 2002). "Postmodernism is better described as a family of theories and perspectives that have something in common" in which people "are involved in the creation of their own lives" (Slife & Williams, 1995, p. 55). CCT is a dynamic between trainer and trainee in which truth and knowledge are constantly open to revision and negotiation as they meet each other (Slife & Williams, 1995).

Postmodern ways of knowing are associated with the social world of discourse and activity. The dynamic of CCTs, trainers and trainees is a construct that can only be understood with the type of knowledge “set within the conditions of the world today and in the multiple perspectives of class, race, gender, and other group affiliations” (Creswell, 1998, p. 79). Postmodernists rejected the modernistic duality of the individual as being separate from an objective reality. Instead, reality is seen as being constructed by individuals and groups, which give it meaning. The postmodern way of knowing is the most appropriate way of arriving at the truth for this study, as it involves the relationships made by people and their social and historical discourse (Slife & Williams, 1995).

There are two postmodern ways of knowing: social constructivism and hermeneutics, which both reject empiricism and rationalism as universal ways of knowing. For social constructivists, ways of knowing occur in the relationships among people as they converse, negotiate, and share their world with others (Patton, 2002). Furthermore, the way people *know* is the result of what they understand as a product of social and historical discourse. Constructivists assert that knowledge is based on constructs (a person’s view of the world), which are created and shared by the individual and his or her cultural group (Slife & Williams, 1995).

During CCTs, trainers and trainees are engaged in a unique social and cultural interaction that has different interpretations among different groups of people (Slife & Williams, 1995), which is precisely why I have chosen social constructivism as the epistemological conception upon which this study was built. Trainers and trainees create their own social construct as a result of the unique experience derived from training.

Underlying Assumptions

Slife and Williams (2005) stated the importance of knowing underlying ideas, as well as their assumptions and implications, because this is what will help researchers to understand the theory they have chosen to guide their study. Postmodernists suggest that human behavior is the reflection of broad, rich, changing, and open-ended interrelationships in which the condition of the world where people live determines or influences their behavior (Slife & Williams). This very same principle of postmodernism constitutes one of its assumptions, which states that the origin of human behavior is mainly determined by society. Because of this assumption, one of the postmodernist implications is that human behavior is a product of determinism (Slife & Williams, 1995). Even though I have chosen postmodernism as the underlying paradigm to support the study, I also must acknowledge and make it clear that I do not agree completely with this belief. Postmodernists need to recognize that even though the world in which people live is important and influences people's behavior, does not necessarily make the environment the cause of people's behaviors. I do understand and recognize that the interaction between trainers and trainees is very important in determining future behaviors; however, I do not believe that the future behavior of both trainees and trainers will be determined only by the reality they construct from this encounter, and that is why the methodology embedded in my Philosophy is an inductive approach.

Rationale for the Use of Qualitative Methods

There has been and there will always be antagonism between those who favor qualitative and those who favor quantitative research. Many believe that quantitative is the only way to conduct serious research. The truth is that there are certain experiences that cannot be statistically or experimentally controlled and need much more than numbers to be expressed significantly (Berg, 2001). There are other cases in which measure and analysis of the variables will not reflect what it is intended to show; in other words, it will not be enough. For instance, experiences such as smells, sounds, and sight cannot be expressed by numbers; experiences such as these call for a qualitative approach (Berg 2001). Many had criticized qualitative methods for being nonscientific and therefore invalid. Dabbs (1982) explained that the essential difference between these two approaches is that “quality is essential to the nature of things” and “quantity is elementally an amount of something” (p. 32). In spite of the effort of many to bring these approaches together and honor both with the same importance “in many social sciences, quantitative orientations are often given more respect” (Berg, 2001, p. 2).

The reason of these polarized positions is that each of them, qualitative and quantitative approaches, comprise or enclose key characteristics that set them apart. For instance, the qualitative method seeks answers to questions “that stress how social experience is created and given meaning” (Denzin & Lincoln, 2003, p. 13). On the other hand, “quantitative studies emphasize the measurement and analysis of causal relationships between variables, not processes” (Denzin & Lincoln, p. 13).

Designing a qualitative study can be intimidating because it is a relatively new approach, which has been criticized and denied legitimacy. As mentioned above, for a long time quantitative researchers have dismissed the contribution of the qualitative counterpart and a lot has been said to disqualify qualitative researchers. Contrary to what many believe, the qualitative approach is also very challenging since the researcher needs to "approach the world with a set of ideas, a framework (theory, ontology) that specifies a set of questions (epistemology) that he or she then examines in specific ways (methodology analysis)" (Denzin & Lincoln, 2003, p. 30).

The qualitative approach is essential to describe the nature of things, whereas quantity is to show an amount of something. Thus, "quality refers to the what, how, when, and where of things – its essence and ambience. Qualitative research thus refers to the meanings, concepts, definitions, characteristics, metaphors, symbols, and descriptions of things" (Dabbs, 1982, p. 32). Furthermore, Qualitative researchers "stress the socially constructed nature of reality . . . . [seeking] answers to question that stress how social experience is created and given meaning" (Denzin & Lincoln, 2003, p. 13).

The qualitative approach was chosen, because it is the best suited for the purpose of this study. The study was based on the lived experiences of trainees who had received CCT and have interpreted their reality as a result of certain cultural constraints. Swanson and Holton (2005) explained that every organization is made up of human beings "who bring with them attitudes, prior knowledge, values, beliefs, motivations, hopes, worries, prejudices, spiritualities, politics, standpoints, social locations and other characteristics that mark their lives and ultimately affect their performance, both as individuals and within groups in the workplace" (p. 222). There are many different circumstances in which the lives of people in organizations are affected and it is important to be able to account for these issues. Companies spend thousands of dollars per year on CCT; therefore, the effects of these trainings should be considered. More importantly, these CCTs might result in benefits or losses for the organization, which in the long run will show in executives' performance and the company's return of investment (ROI).

To explore more about this issue, I had direct contact with the participants. Guba and Lincoln (1985) explained that by 1960's the traditional approach to research relied too much on the researcher's point of view and less on the participant's. So philosophers proposed an alternative form of research in which participants were studied within their contexts, immersed in their every day personal experiences. This new approach for research was called *naturalistic inquiry or constructivism*.

Qualitative research is naturalistic in essence because, as Miles and Huberman (1994) explained, the researcher conducts an intense and prolonged contact with a field or life situations to gain a holistic overview of the topic being studied. "Natural experiments occur when the observer is present during a real-world change to document a phenomenon before and after the change" (Patton 2002, p. 42). I spent time in direct contact with the executives/participants of the study. By doing this, I captured data "on the perceptions of local actors from the inside, through a process of deep attentiveness, of empathetic understanding (Verstehen), and of suspending or bracketing preconceptions about the topics under discussion" (p. 6). Thus my role, the role of the researcher, was paramount in a qualitative method and it is also another characteristic of the approach.

Besides naturalistic, qualitative research is inductive. Qualitative research understands that the inquiry is particularly oriented toward exploration, discovery, and inductive logic. Inductive analysis, another characteristic of qualitative research, "begins with specific observations and builds toward general patterns. Categories or dimensions of analysis emerge from open-ended observations as the inquirer comes to understand patterns that exist in the phenomenon being investigated" (Patton, 2002, p. 56). I explored and discovered certain phenomena that I later collected and built toward general patterns. To remain constant to the principles of qualitative research, I decided beforehand what was important and what was not; neither I speculated with relationships among these variables. I understood "the multiple interrelationships among dimension that emerge from the data without making prior assumptions of specifying hypotheses" (Patton, p. 56).

For the study for be useful, I provided a rich thick description of the phenomena of the effects of CCT. Patton (2003) explained thick, rich description as a "good description [that] takes the reader into the setting being described" (p. 437). Denzin (as cited in Patton, 2003) explained that thick description does more than recording what a person is doing:

> It goes behind mere fact and surface appearance. It presents detail, context, emotion, and the webs of social relationships that join persons to one another. Thick description evokes emotionality and self-feeling. It inserts history into experience. It establishes the significance of an experience, or the sequence of

> events, for the person or persons in question. In thick description, the voices, feelings, actions, and meanings of interacting individuals are heard. (p. 503)

Creswell (1998) explained tradition of inquiry as an "approach to qualitative research that as a distinguished history in one of the disciplines and that has spawned books, journals, and distinct methodologies that characterize its approach" (p.2). I have chosen Phenomenology out of these five approaches Creswell proposed, because I consider that due to its intrinsic characteristics it the most suitable to guide the study.

Rationale for the Use of Phenomenology

Phenomenology is a multifaceted philosophy that includes: the transcendental phenomenology of Edmund Husserl (1859-1938), the existential phenomenology of Maurice Merleau-Ponty (1908-1961) and Jean-Paul Sartre (1905-1980), and the hermeneutic phenomenology of Martin Heidegger (1889-1976) (Schwandt, 1997). Hermeneutic and existential phenomenologies are the ones manifested in contemporary qualitative methodologies. Hermeneutic phenomenology "tries to be attentive to both terms of its methodology: it is descriptive (phenomenological)… [and] it is interpretive (hermeneutic)" (Van Manen, 1990, p. 181). Existential phenomenology, known by the work of Alfred Schatz (1899-1956), a social constructionist scientist who was also a colleague of Husserl, is more oriented "toward describing the experience of everyday life as it is internalized in the subjective consciousness of individuals" (Schwandt, p. 115).

Traditionally, phenomenologists reject empiricism and rationalism in which knowledge is based on logic and reasoning only. Contrary to these beliefs, phenomenologists "insist on careful description of ordinary conscious experience of everyday life (*the life-world*), a description of ‘things’ (the essential structures of consciousness) as one experiences them” (Schwandt, 1997, p. 114). *Life-world* has been the project of phenomenology in that it constitutes “the basis for meaning in every science; in all natural and social science (as well as logic and mathematics) the life-world is presupposed and pre-given” (Schwandt, 1997, p. 83). Husserl’s transcendental phenomenological philosophy seeks to explain the essence of life-world. Husserl’s phenomenology is considered transcendental “because it adheres to what can be discovered through reflection on subjective acts and their objective correlates” (Moustakas, 1997, p. 45). His transcendental phenomenology emphasizes subjectivity. For the purposes of my study, I have chosen Transcendental Phenomenology because it “seek[s] to understand the life world or human experience as it is lived, and have similar and complementary end-points in description” (Moerer-Urdahl & Creswell, 2004, ¶ 1).

Husserl explained that there are two kinds of attitudes: the “natural attitude” and the “phenomenological attitude”. The former seeks to explain the characteristics of our being in the life-world. This is the everyday involvement with people, things, and life in general. The latter, the phenomenological attitude, is more philosophical because it is an “act of pure reflection in which we suspend, distance ourselves from, or bracket all the intentions, awareness, and convictions…” (Husserl, as cited in Schwandt 1997, p. 83). The last interpretation of the phenomenological attitude is what Husserl called the transcendental epoche, “transcendental meaning literally to get beyond or transcend the limits of ordinary experience” (p. 83), and this is what I intend to do. I will distance myself as the researcher, and I will bracket all previous ideas when interviewing the participants. By doing that, transcendental meaning will take place which is the ultimate goal for this kind of research.

Schwandt (1997) stated that phenomenology is, among other things, "a description of [things] as one experiences them" (p. 114). He explained "things" as everyday experiences of the life-world, such as hearing, seeing, believing, remembering, deciding, feeling, judging, evaluating and so on. He further explained that the only way people can experience these feelings and perceptions is by "turning from things to their meaning, from what is to the nature of what is" (p. 114). This action of turning away can be done by an act of reduction or *epoche* as Husserl named it. Thus, "epoche requires the elimination of suppositions, and the raising of knowledge above every possible doubt" (Moustakas, 1994, p. 26). This reduction of epoche entails bracketing or what Husserl called the *natural attitude*. This natural attitude is "the everyday assumption of the independent existence of what is perceived and thought about" (Schwandt, 1997, p. 114).

Phenomenology "seeks to understand information from people who have directly experienced the phenomenon" (Patton, 2002, p.104). I will interview six executives who have received cross-cultural training. I will later interpret the influence of the Cross-Cultural Training only from the point of view of the participant(s) avoiding critical evaluation. Schwandt (1997) explained that this distant or objective approach "can be accomplished only by a certain phenomenological reduction or epoche that entails bracketing or suspending what Husserl called the natural attitude" (p. 114). A phenomenologist conducts in-depth interviewing, acknowledging that the interviewee will have a particular way of interpreting his/her reality. These in-depth interviews with people who have directly experienced the phenomenon help to understand the phenomenon more deeply and bring a greater understanding of the participant's everyday experiences (Patton, 2002). Phenomenologists are concerned with and want to know about people's experiences and how it is that they experience what they experience. Thus, I will find out how these six executives went through different experiences of receiving Cross-Cultural Training. Thus, I will seek to understand information directly from these executives who have experienced the phenomenon first-hand.

The foundational question of phenomenology asks: "What are the meanings, structures, and essences of the lived experience of this phenomenon for this person or group of people?" (Patton, 2002, p. 104).And this is precisely what this study seeks to uncover. The concept behind the study is to understand how people experience the phenomenon of CCT and the effect of the training on their social adjustment and performance while on international assignments. Cross-Cultural trainees experience the phenomenon of the encounter with their trainers in a specific way, with a lived meaning attached to it. The lived experience of each trainee as an individual is to be explored by the researcher so that some generalizations can be made to contribute to the field of training and development in international organizations.

The Contribution of Phenomenology to HRD

Due to its interpretive nature, phenomenology as a research methodology is a great contribution to HRD. In HRD, phenomenology helps to explain the essence of human experience. Phenomenology is an integral methodology for HRD research, and it is essential for the field since it provides a more "complete understanding of the holistic nature and complexity of experiences that are relevant to HRD practice" (Gibson & Hanes, 2003, ¶ 1). Phenomenology in the field of HRD seeks to determine "what an experience means to the individuals who have had it and be able to provide a comprehensive description of the experience" (Moustakas, 1994, as cited by Swanson & Holton, 2005, p. 358). The phenomenological approach helps to better interpret unique experiences, providing a rich understanding of the phenomenon which can also be used as a theoretical explanation (Swanson & Holton).

Research Questions

There is one primary research question with two sub-questions, included in this study. This question asks:

> 1) What is the impact of CCT on executives' social-cultural adjustment vis-à-vis performance during international assignments?
>
> The two sub-questions are:
>
> a) What are the benefits of CCT?
> b) What are the gaps/areas of improvement of CCT?

Methods

It is significant to differentiate between *methodology* and *research methods*. *Methodology* means "pursuit of knowledge," whereas *method* is a "certain mode of inquiry" (Van Manen, 1990, p. 28). Methodology is based on a philosophical framework, on a particular view of knowing, its assumptions, and a general orientation to life, whereas methods are steps a researcher follows. Patton (2002) stated that "there is not a recipe or formula in making methods decisions" and that like "in art, there can be no single, ideal standard" (p. 12).

A phenomenological study follows a method that discourages any predisposition toward fixed procedures, techniques and/or concepts. Phenomenology follows certain methods or traditions that rather than being predetermined or fixed are "discovered or invented as a response to the question at hand" (Van Manen, 1990, p. 29). Qualitative methods make possible the study of issues whose characteristics are deep and rich in detail. Phenomenological method is an open approach, free of constraints, and rich in qualitative methods "that typically produce a wealth of detailed information about . . . people and cases" (Patton, 2002, p. 14). These characteristics of phenomenological methods set it apart from quantitative methodological research. One of the most important characteristics of phenomenological methodology is the instrument; in qualitative research, the instrument is the researcher.

Role of the Researcher

As the researcher is the instrument, the credibility of qualitative methods depends "on the skill, competence, and rigor of the person doing fieldwork – as well as things going on in a person's life that might prove a distraction" (Patton, 2002, p. 14). Denzin and Lincoln (2003) compared the researcher with a *bricoleur* or quilt maker who "uses the aesthetic and material tools of his or her craft, deploying whatever strategies methods, or empirical materials are at hand" (Becker, as cited in Denzin & Lincoln, 2003, p. 6). Therefore, objective reality is impossible to capture. Patton (2002) recommended staying away from debates about subjectivity versus objectivity, and replacing that dichotomy with concepts such as trustworthiness and authenticity. Trustworthiness is defined as "that quality of an investigation (and its findings) that made it noteworthy to audiences" (Schwandt, 1997, p. 164). Ultimately, according to Patton (2002), "any research strategy . . . needs credibility to be useful" (p. 51).

In a qualitative study, the researcher is the instrument. This characteristic of qualitative research can pose certain biases on the interpretation of the findings. Some critics of the qualitative method argue that the qualitative approach is too subjective since the researcher is the instrument. Patton (2002) stated that "in qualitative inquiry, the researcher is the instrument. The credibility of qualitative methods, therefore, hinges to a great extent on the skill, competence, and rigor of the person doing fieldwork – as well as things going on in a person's life that might prove a distraction" (p. 14).

Patton (2002) recommended staying away from terminology such as subjectivity and objectivity, and using other terminology such as trustworthiness and authenticity. This characteristic of qualitative research is a strength and also a weakness. It is a strength if the researcher is a well-trained, experienced observer, which will add to the value of the inquiry, but it will be a weakness if the researcher is ill-prepared or inexperienced. Ultimately, any research needs credibility if it is intended to be useful.

Credibility of the Researcher

The fact that in qualitative research the researcher is the instrument does not make this approach less scientific or lacking. On the contrary, "it merely specifies that it is crucial for validity –and, consequently, for reliability - to try to picture the empirical social world as it actually exists to those under investigation, rather than as the researcher imagines it to be" (Filstead, as cited in Patton, 2002, p. 52). Thus, a study's credibility, as a connotation of truth, is such when only it is confirmed by the reader who "recognizes the situation described by a research study as closely related to their [*sic*] own experience (sometimes referred to as conformability)" (Project Gold, Research Method, n. d. Glossary).

Patton (1990) explained that there are three important aspects of credibility that he called the *credibility triangle*. They are "1) rigorous *methods* for doing field work that yield high-quality data . . . [which is] analyzed with attention to issues of credibility, 2) *the credibility of the researcher*, which is dependent on training, experience . . . and presentation of self, [and] 3) *philosophical belief in the value of qualitative inquiry* that is, a fundamental appreciation of naturalistic inquiry, qualitative methods, inductive analysis, purposeful sampling, and holistic thinking" (p. 571).

In the end, credibility and quality are connected to each other "in that judgments of quality constitute the foundation for perceptions of credibility" (Patton, 1990, p. 542). They both depend on the ability and willingness of the researcher to carefully weigh the evidence and be open to learn and understand how to do things better next time. These issues will be extensively covered under quality and verification.

Researcher Bias

Because in qualitative research the researcher is the instrument, the qualitative report should include some information about the researcher (Patton, 2002). In order to establish credibility, Patton (2002) explained that it is important "to report any personal and professional information that may have affected data collection, analysis, and interpretation" (p. 566). Thus, right from the start, the qualitative researcher needs to identify his/her biases, assumptions, and specify the ideology or conceptual frame for the study. Janeskick (as cited in Leech & Onwuegbuzie, 2006) stated that "by identifying one's biases, one can see easily where the questions that guide the study are crafted" (slide # 85).

As mentioned previously, I have experienced the phenomenon of CCT on both sides: as a trainee and as a trainer; however, as a researcher, I honored one of the most valuables beliefs (or principles) of phenomenology: epoche. I suspended, transcended, distanced or bracketed myself from all intentions and previous convictions toward the phenomenon of CCT, adopting a truly phenomenological attitude in which "transcendental meaning [will go] beyond or transcend the limits of ordinary experience" (Husserl, as cited in Schawndt, 1997, p. 83).

Sampling and Sample

Patton (2002) stated that "perhaps nothing better captures the difference between quantitative and qualitative methods than the . . . sampling approaches" (p. 230). In qualitative inquiry, the sample is usually small and purposeful, whereas in quantitative research the sample is larger and randomly selected. There are three components to sampling design: sampling scheme, sample size, and sampling design. "Sampling schemes are strategies used to select units (e.g., people, groups, events, setting) and sampling designs represent the framework within which the sampling takes place, including the number and types of sampling schemes, as well as the sample size" (Leech & Onwuegbuzie, 2006, slide # 44).

Patton (2002) explained that decisions about sample size and design are directly related to the theme of analysis. Strategies used to select the sampling are part of the sampling scheme. Intrinsic characteristics such as the nature of the phenomenon under study must be deeply described once the sample has been chosen. Schawndt (1997) explained that it is "inadequate to offer only the standard litany of statistical-demographic data for a site (e. g., number of participants, age, gender, and so on) coupled with the usual physical description and geographical data" (p. 141). He explained that the description needed must include such rich details that "readers [will get] a sense of the typical acts, actions, relationships, and so on in the site" (p. 141).

For this study, executives from international companies were chosen. Among the characteristics mentioned above, the premise they all had in common is that they had experienced the phenomenon of CCT. Thus, the sampling design for the study was purposeful because the sampling constitutes information rich cases. "Information-rich cases are those from which one can learn a great deal about issues of central importance to the purpose of the inquiry" (Patton, 2002, p. 230). Creswell (1998) called this purposeful sampling and explained that "the researcher needs to clearly specify the type of sampling strategy in selecting the case (or cases) and a rationale for it" (p. 251).

Furthermore, the information collected about the phenomenon yielded "insights and in-depth understanding rather than empirical generalization" (Patton, 2002, p. 230). For the sampling framework of the study, Miles and Huberman (1994) typology of 16 strategies was chose, the one called *criterion* because "it is essential that all participants experience the phenomenon being studied" (Creswell, 1998, p.48). Patton (2002) explained that a researcher chooses a criterion sampling because the phenomenon to be studied deeply “reveals major system weaknesses that become targets of opportunity for program or system improvement” (p. 238). I chose international corporations with subsidiaries around the world whose executives provided rich information about the phenomenon, constituting an opportunity for improvement if necessary.

Another important factor when choosing the place(s), site(s), or case(s) is to “consider sampling across time, occasions or events, and people” (Creswell, 1998, p. 141). What the researcher needs to know and be sure of, is that whatever he/she is observing is customary there and not the result of participants behaving a certain way due to the researcher’s presence on the site (Schwandt, 1997). That is why I will plan to contact the participants twice. The first meeting will be a face-to-face interview and the second time a phone conversation. Due to the inherent characteristics of the phenomenological approach, these participants must be easily accessible; therefore, I need to choose them carefully.

Another important component of the sampling design is the sampling size. Sampling size in qualitative research should not be too large, because it will be difficult to extract thick, rich data, but at the same time “the sample should not be too small that it is difficult to achieve data saturation, theoretical saturation, or informational redundancy” (Sanselowski, 1995, as cited in Leech & Onwuegbuzied, 2006, slide # 50). Patton stated that “there are no rules for sample size in qualitative inquiry” and that all will depend “on what you want to know, the purpose of the inquiry, what’s at stake, what will be useful, what will have credibility, and what can be done with available time and resources” (p.

244). He also recommended designing minimum samples in which the researcher can cover the phenomenon mainly considering the purpose of the study. I will purposively select six executives who have gone through CCT within an international company. Morse (as cited in Denzin & Lincoln, 2003) suggested “using at least six participants in studies where one is trying to understand the essence of experience” (p. 274). For interviews, Creswell (1998) recommended up to 10 people.

The selection of the participants for this study was based on purposeful, criterion-based sampling. Participants were six executives form international companies who had received CCT. The researcher contacted international executives who have participated in CCT and worked in international assignments. The initial contact letter is attached (see Appendix A). The first six who responded agreeing to participate on the study comprised the sample.

The researcher made the first contact, with potential participants through e-mail. A copy of the script of the contact can be found in Appendix A. The topics to be included in the first contact with the executives are the following: information about the study, the reason why the person has been chose, the individual time commitment required for the project, that the interview will be tape-recorded, and issues regarding confidentiality. The interview was scheduled at a mutually convenient time and location for the participant and the researcher. Furthermore, participants were told that they have the right to stop the recorder to answer a particular question and/or refuse to answer any question. A reminder of the data and time of the interview was sent to participants several days in advance.

Instrumentation

In-depth interviews, lasting as long as 2 hours, were the main instrument in the process of collecting information for this phenomenological study. In-depth interviews "describe the meaning of a small number of individuals who have experienced the phenomenon" (Creswell, 1998, p. 122).

The phenomenological interview, as a data collection, is concerned with knowing what people experience and how they interpret the world. In qualitative studies, the interview has become increasingly common as a "form of discourse between two or more speakers . . . in which the meanings of questions and responses are contextually grounded and jointly constructed by interviewer and respondent" (Schwandt, 1997, p. 75).

Patton (2002) explained that the reason we interview people is to ask them things that we cannot directly observe such as feelings, thoughts, intentions, and so on. Thus, "the purpose of interviewing … is to allow us to enter into the other person's perspective" (p. 341). Seidman (1998) stated that "interviewing allows us to put behavior in context and provides access to understanding [people's] action" (p. 4). The idea is that by interviewing people the researcher will be able to extract from somebody's mind these perspectives. In order to do that, researchers need not only to develop an authentic interest in listening and getting to know other people, but more importantly researchers need to be disciplined and have developed thorough (meticulous) inquiry techniques based on skills and personal ability (Patton, 2002).

Patton (2002) distinguished three types of interview instrumentation: “informal conversational interview, the general interview guide approach, and the standardized open-ended interview” (p. 342). The first one, the conversational interview, is also called unstructured interviewing and offers great flexibility to get information in whatever direction it is necessary. The second one, the interview guide, the researcher has a list of questions or issues that are to be explored during the interview and will be used as a guide. Hence, the interviewer has the freedom to explore or go in different directions but always “with the focus on a particular subject that has been predetermined” (p. 343). The last one, the standardized open-ended interview, is an approach that “requires carefully and fully wording [of each question] before the interview . . . to be sure that each interviewee gets asked the same questions – the same stimuli – in the same way and the same order . . . “ (p. 344).

Data Collection

For the purpose of this study, the method of data collection was face-to-face interview. The type of interview used was the standardized, open-ended interview questions (see Appendix B). Interviews were expected to be limited to one interview per participant. The length of the interview was expected to be approximately one hour.

Participants signed the Informed Consent Letter and completed the demographic information before the interview began (see Appendices C and D). The process of the interview consisted of three sections. The first section of the face-to face interview was for socialization with the interviewee, in order to put the participants at ease. The second section of the meeting was dedicated to the gathering of information. Finally, the third section was a conclusion and closing of the interview.

I have created my self-made questionnaire with six questions (see Appendix B). These questions were written in advance and were asked in the exact same order to each of the six executives in a period of no more than 1 hour in length during the face-to-face interview. I appreciate the advantage of the standardized approach because “collecting the same information from each person poses no credibility problem when each person is understood as a unique informant with a unique perspective” (p. 347). On the other hand, I am also aware that “the standardized approach . . . does not permit the interviewer to pursue topics or issues that were not anticipated when the interview was written” (p. 347). For these reasons, I decided to do follow-up interviews. Thus, the initial interview started with a short, free conversation conducted face-to-face at the executives’ offices or allocation of his/her choosing. According the Seidman (1998), this initial phase of socialization is very important since the researcher wants to establish the necessary rapport to conduct a successful interview. The standardized questionnaire was followed with this open-ended question: *Is there any other thing you would like to add?* This gave “interviewees room to share a variety of experience and outcomes” (Patton, 2002, p. 348).

Tape recorded interviews were transcribed by the researcher. Once transcripts were completed each interviewee was asked to verify her/his transcript for the interview. Transcripts were sent to participants for verification and returned to the researcher via e-mail. It was expected that participants spend approximately 30 minutes each in reviewing the transcripts. Therefore, it was expected that the participants dedicate approximately 90 minutes to the project (60 minutes for the interview and 30 minutes to review the transcripts).

Once all participants had confirmed the accuracy of their transcripts, the tapes were destroyed, as required by the IRB. Transcripts will be stored in the researcher's home in a locked file. The Informed Consent Forms and any documents that may contain participant identifiers will be filed and locked separately. All data will be destroyed after five years.

Data collection is a process of correlative steps that guides the researcher to collect information to respond to the research questions (Creswell, 1998).

The first step is *locating the site/individual*. As previously stated, for the purpose of this study I have selected multiple individuals from one or more international corporations with subsidiaries around the world whose six executives, "have experienced the phenomenon being explored and can articulate their conscious experiences" (Van Manen, 1990, p. 111). The second step, *gaining access and making rapport,* will directly affect data quality. Access and rapport issues are concerned with finding people "who have experienced the phenomenon and gaining their written permission to be studied" (Creswell, 1998, p. 117). Part of the process of gaining access also involves submitting a proposal to the board with details about the study. The proposal submitted to Institutional Review Board (IRB) "needs to conform to standard procedures and language in positivist research . . . as well as information about the protection of human subjects (Patton, 2002, p. 270). When working with human beings it is a requirement to present to participants the actual Informed Consent Form for signature.

The Informed Consent Letter must include: the right of participants to withdraw from the study at any time; the purpose of the study and the methodology for data collection; specifications about confidentiality; disclosure of known risks associated with the study; the benefits the participants might expect; and a place for the participant and for the researcher to sign and date (Creswell, 1998) (see Appendix C for the Informed Consent Form)

Collecting data is the fourth step. There are four typical types of collecting information: observation, interviews, documents, and audio-visual material (Creswell, 1998). For the purpose of this study, and as mentioned above, the instrument selected for data collection will be in-depth interviews. Once the researcher is in the field, the main way of recording data during an interview is with a tape recorder. A good tape recorder is crucial for a fieldworker since the main objective of phenomenology is to reproduce as closely as possible the actual words of the interviewee. Patton (20002) explained that “the raw data of interviews are the actual quotations spoken by interviewees [and that] nothing can substitute for these data: the actual things said by real people” (p. 380).

Independently of using a tape recording, taking notes during interviews is also recommended. “The use of the tape recorder does not eliminate the need for taking notes” (Patton, 2002, p. 381), It rather allows the researcher the freedom to concentrate on taking more strategic notes setting the pace of the interview process. There are several purposes that justify the practice of taking notes. Some of these purposes are that it creates the opportunity to go back to what was said earlier and formulate new questions, it also facilitates later analysis, but more importantly it serves as a backup in case the tape recorder has malfunctioned or the information is lost during transcription.

The fifth step is *recording information*. Creswell (1998) recommended using interview protocols which “enable a person to take notes during the interview about the responses of the interviewee” (p. 126). During the interview the researcher uses a sheet to keep a record of observations other than answers to the questions. This is done because once in the field there are other relevant observations worthy to record, but due to their nature are impossible to be tape recorded. For instance, non-verbal responses and physical description of the place are hard to capture when tape recording. This way of recording information is called protocols. Protocols are also useful because they guide the researcher through the interview acting as a reminder of certain aspects of the process such as information on ending the interview, thanking people, and so on. The protocol consists of a page, separated from the questions, that usually starts with the header where to place the participant’s “alias” followed by two subtitles which describe and observe where to jot down notes accordingly. One side, the descriptive one is “where the researcher records a description of activities and a drawing of the physical setting,” and the other side, the reflective one, provides “reflective notes . . . about the process, reflection on activities, and summary conclusions . . . for later theme development” (Creswell, 1998, p. 128).

The sixth step is concerned with *field issues*. These issues relate to the adjustments that might be done once the researcher has already entered the field (Creswell, 1998). One of these issues is the time needed to collect data. In qualitative research the amount of data collected may become overwhelming for later analysis. This is why Creswell recommended as data collection no more than one or two interviews. Another aspect related to the time issue on collecting data is the "amount of energy and focus required to establish a substantial database" (p. 128).

Equipment is another issue that many times gets on the way of successful interviews. Since I will be tape recording the interviews it is not only important to have good recording equipment, but it is also important to know who and how recorded data is going to be transcribed.

Phenomenological interviews are long and intense; therefore patience and skill are required on the part of the researcher, constituting another challenging issue in the field. Researchers must have the command of skilled techniques for asking "appropriate questions and relying on informants to discuss the meaning of their experiences" (p. 130).

Last but not least, is the issue of ethics which is not only present during data collection but also during analysis and dissemination of the report. Within ethics there are several considerations and appropriate standards that can guide the researcher to remain ethical through the end of the research process. Part of those ethical issues is anonymity and confidentiality. Ethical issues are thoroughly discussed under the Ethics section

The last step of data collection is *storing data*. The approach to store data will depend on the type of information the researcher has collected. The idea is to develop a filing system that helps the researcher organize the information retrieved (Creswell, 1998). Qualitative researchers collect extensive information, so the way in which they organize and store information becomes paramount. There are several computer programs with interesting options to organize and sort data. Whether the researcher uses computer programs or just his/her own system of organizing and sorting, Creswell (1990) recommended some principles that must be observed to successfully accomplish this step. Some of these principles are: the researcher should always develop a backup copy of computer files, develop a master list according to the information gathered, find the way to mask the participants' names, and develop a collection matrix which will make it easier to locate and identify information.

Timeline

Miles and Huberman (1994) stated that many people refer to qualitative studies as "labor intensive" (p. 46) but that not many details are provided. So they offered their experience and the experience of other colleagues to provide a timeline. The time needed for the study will depend on who is doing the research. If it is an individual, they recommended having a critical friend or partner to "supply alternative perspectives, support, and protection from bias and self-delusion" (p. 46). It is important to spend time developing relationships with people the researcher will work with, but more important is to devote early time to work on core issues such as deciding the conceptual framework, research questions, sampling and so on.

In addition to these preliminary considerations, there are the considerations of time needed to spend on the fieldwork, the days needed for writing up field notes, coding, completing displays, doing data analysis, writing the entering and the final report (Miles and Huberman (1994). According to their estimations they calculated that for each day of fieldwork, a researcher is going to spend "2 or 3 days processing field notes (writing them up, correcting, etc.)” (p. 46). If tapes are to be transcribed, “the multmple may run from 4 to 8, depending on the fineness of detail and the transcriber’s familiarity with the context” (p. 46). They also added 1 or 2 days coding and 1 or 2 days completing displays and writing. For the present study, I have calculated one month to collect and analyze data, and one month to write the narrative.

Data Analysis

Any kind of analysis involves a specific way of thinking. Schwandt (2001) said that data analysis is “art and science” (p. 6). Data analysis is indeed a very intuitive process that depends on the insights and conceptual capabilities of the analyst. It is pretty much up to the researcher’s “insight, intuition, and impression” and on how competent he/she is on pattern recognition (Dey, as cited in Creswell, 2002, p.78). Creswell (1998) explained that process analysis could be represented in a spiral image in which “the researcher engages in the process of moving in analytic circles rather than using a fixed linear approach” (p. 142).

During data analysis, the researcher systematically searches and arranges the interview transcripts, field notes, and all other information collected during the fieldwork. Thus, qualitative analysis constitutes a method of “systematic and explicit audit trail” (Onwegbuzied & Leech, 2006, slide # 76) recommended as a means of evaluating and increasing legitimization. Qualitative findings are often challenged in terms of the nature of the systematic analysis. In spite of the lack of precise and fixed rules on how to analyze and interpret qualitative data, there are several general procedures for analysis that are worthy to try. For instance, Creswell (1998) explained that there are three different approaches, each one of them represented by a different author. These authors are Bogdan and Bicken (1992), Huberman and Miles (1994), and Wolcott (1994b).

Miles and Huberman (1994) defined analysis as a succession of three interactive activities: *data reduction*, *data display,* and *conclusion drawing/verification*. Data reduction **i**s a process in which the researcher simplifies the data that is on the transcripts. Data reduction is about the researcher's analytic choices in which he/she codes, summarizes, and more, importantly, brings new ideas that later go into a matrix. This organization of the research choices is called *data display* and constitutes the second activity of the process which helps to sort, sharpen, discard, and organize data in a way that "final conclusions can be drawn and verified" (p. 11). These conclusions permit and help researchers to understand "what is happening and to do something –either analyze further or take action- based on the understanding" (p. 11).

The third data analysis activity is *conclusion drawing and verification***.** Initially, conclusions are held lightly because the researcher wants to be open and skeptical until final conclusions are drawn. As the analysis continues, conclusions are verified. Stratuss and Corbin (1998) stated that the process of analysis is to encourage the researcher to exercise different ways of thinking, directing him/her away from literature and also from personal experiences. Another purpose of the analysis is to help the researcher to clarify assumptions. Clarification of assumptions is possible due to the nature of phenomenological in depth interviews in which findings are drawn from data collection, and data collected vividly reflects what people say or do.

Qualitative Analysis Strategies

Onwuegbuzie and Leech (2006) explained seven qualitative analysis strategies. They are: method of constant comparison, classical content analysis, keywords-in-context, word count, domain analysis, taxonomic analysis, and componential analysis. Among the types of analysis, constant comparison analysis is the most commonly used in qualitative research. Some other authors such as Miles and Huberman (1994) refer to this type of analysis as “coding”, and it was created by Glaser and Strauss in 1967. This analysis consists of a series of steps. First, the entire set of data is read and organized in small parts. These parts or chunks of data are labeled with a descriptive “code.” Once this is done, the researcher compares each new chunk of data with new information to determine if any of the new information is similar to information collected before in order to place it under an existent code or create a new code. Each code under which each group of information is selected (or placed) has a theme or characteristic that will be identified and documented (Onwuegbuzie & Leech, 2006).

Due to the intrinsic characteristics of the phenomenological in-depth interviews, I consider that the mode of data analysis called *constant comparison* is the best method of analyzing the data I will collect for the study.

Phenomenological Data Analysis

The data analysis of this study was conducted according Moustakas’ (1994) version of the Stevick-Colaizzi-Keen’s method. The steps were as follows:

1) Using the phenomenological approach, I will obtain a full description of the

experience of the phenomenon.

2) From the verbatim transcript of the experience I completed the following steps:

a) I considered each statement with respect to significance for description of the experience.

b) I recorded all relevant statements.

c) I listed each no repetitive, overlapping statement. These are the invariant horizons or meaning units of the experience.

d) I related and clustered the invariant meaning units into themes.

e) I synthesized the invariant meaning units and themes into a description of the textures of the experience, including verbatim examples.

f) I reflected on my own textural description. Through imaginative variation, I constructed a description of the structures of my experience.

g) I constructed a textural-structural description of the meanings and essences of my experience.

The phenomenological data analysis consists of a series of steps. The analysis starts when the researcher places the transcripts before him/her and studies them through the appropriate methods and procedures. This is the first step of the analysis called *epoche* or *bracketing***.** During epoche, “the researcher sets aside, as far as is humanly possible, all preconceived experiences to best understand the experiences of participants in the study” (Creswell, 1998, p. 235). The researcher looks at the interviews and finds statements that reflect how individuals experience the topic and regard every possibility or statement relevant to the topic as having equal value. The researcher lists these statements giving them equal value in a process called *horizontalization* of the data.

For the purpose of this study, I began with a description of my experience of the phenomenon as a Cross-Cultural Trainer. After that, I looked for statements taken from the interviews about the different ways in which participants have experienced their meetings with their trainers and I horizontalized them. Upon completion of the horizonalization phase, the meaning or meaning units of collected statements were listed. This is known as *cluster of meanings* and constitutes another step of the phenomenological data analysis. The researcher clustered the statements into common categories of themes, or meaning units, eliminating repetitive statements (Moustakas, 1994).

These clustered themes are used to develop the *textural description* in which the researcher groups the statements creating meaning units, describing the experiences or explaining what happened and how the phenomenon was experienced. This is called textural description because the researcher “writes a description of the textures of the experience” (Creswell, 1998, p. 150). I reflected on my own experience, and I also described how the phenomenon was experienced by the six participants. I used imaginative variation or structural description “seeking all possible meanings and divergent perspectives, varying the frames of reference about the phenomenon, and constructing a description of how the phenomenon was experienced” (p. 150). This is when the researcher developed an overall description of the experience, explaining the phenomenon and highlighting the most important aspects of the experience. The researcher's own experience as a Cross-Cultural Trainer and the construction of the reality of how the phenomenon was experienced by the participants gave as a result the *essence***.** The essence served as the base to inspire the researcher to create a *composite* description on written that captured the experience. I presented this with rich narrative and the use of many direct quotes.

Quality and Verification

Verification is one of many criteria for assessing the quality of a study. Patton (2002) referred to it as a "wave on which the investigator moves from varying degrees of a discovery mode to varying emphases of a verification mode in attempting to understand the real world" (p. 67). Some of these strategies of verification are: *methodological coherence* in which congruence between the research question and the components of the method is important. Another is *sampling appropriateness,* a strategy used to ensure that the sample is consistent with participants who best represent or have knowledge of the research topic. *Data collection and analysis* is another strategy concerned with the matter of correspondence between these two. *Thinking theoretically* is another strategy that ensures that ideas emerging from data are reconfirmed in new data, and *theory development* strategies targeted to ensure that the study moves back and forth between a micro perspective and a macro conceptual/theoretical understanding of the data (Morse, Barnett, Mayan, Olson, & Spiers, 2002).

Qualitative researchers strive to find qualitative equivalents of validity to correspond to validity in a quantitative approach. In qualitative research, validity is related to the accurate representation of the features of the phenomenon that is intended to be described or explained (Pyett, 2003). In the quest to find these equivalents of validity, social science researchers have encountered some challenges. One of the main criticisms of qualitative research is that it fails to “adhere to cannons of reliability and validity” (LeCompte & Goets, as cited in Creswell 2002, p. 197). To justify validity in qualitative research and make it more credible, many social science researchers have even used positivist terminology. This has back fired since “the language of positivistic research is not congruent with or adequate to qualitative work” (Ely et al., as cited in Creswell, 2002, p. 197). Thus, Lincoln and Guba (1985) proposed the use of alternative terminology for naturalistic research that is the parallel or the equivalent of the terminology of quantitative research. To establish the trustworthiness of a qualitative study, the authors proposed four criteria serving as the naturalist’s equivalents of conventional criteria. Words such as *internal validity, external validity, reliability*, and *objectivity* are replaced with *credibility*, *transferability, dependability,* and *confirmability*. Thus, credibility, transferability, dependability, and confirmability are the set of trustworthiness criteria offered to judge the quality or goodness of qualitative inquiry.

Credibility

Credibility is the correspondent term for *internal validity* in quantitative research. Credibility is concerns with how congruent the findings are with reality (Schwandt, 1997). Credibility implies that a study not only needs to be believable to readers, but also must be approved by the participants who provided the information. Thus, a study’s credibility is such only when it is confirmed by the readers who “recognized the situation described by a research study as closely related to their own experience (sometimes referred to as confirmability)" (Project Gold, Research Method Glossary, n.d. ¶ 3). In order to establish credibility once the interviews are transcribed transcripts will be sent to the participants who will confirm the congruency of the study, a process known as member checking (Patton, 1990).

Transferability

Transferability, which is parallel to *external validity,* "deals with the issue of generalization in terms of case-to-case transfer" (Schwandt, 1997, p. 164). It is the researcher's responsibility to assure that the findings of one study can be applied to other situations, and that readers have sufficient information that allows them to evaluate those findings in a specific research setting or in other similar settings (Project Gold. Research Method Glossary, n. d.). In order for my study to be replicable, I provided a rich description of the demographics together with the pertinent context so that others can make decisions regarding the transferability of the findings.

Dependability

Dependability, which corresponds to reliability in traditional research, is related to the process of inquiry itself. It is concerned with the issue of assuring that the process was logical, traceable, and can be documented (Schwandt, 1997). Lincoln and Guba (as cited in Schwandt, 1997) "called for the importance of dependability [as] an analog to reliability – through careful documentation of procedures for generating and interpreting data" (p.138). Within the phenomenological tradition, reliability calls for procedures that minimize research bias. Thus, "rigorous and systematic data collection procedures . . .

and cross-validation source during field fieldwork" are paramount "to establish the validity and reliability of pattern and theme analysis" (Patton, 2002, p. 545).

I proved dependability of the study by the use of the structured interview. Patton (2002) explained that "collecting the same information from each person poses no credibility problem when each person is understood as a unique informant with a unique perspective" (p. 347). I provided careful documentation of the methodology and interpretation of data to my dissertation committee who is considered a panel of experts.

Confirmability

Confirmability, which parallels objectivity in quantitative research, is "concerned with establishing the fact that the data and interpretations of an inquiry were not merely figments of the inquirer's imagination" (Schwandt, 1997, p. 164). In a way, confirmability is related to credibility since the study's credibility is such only when it is confirmed by the participants who were involved in the study rather than by the mere preferences of the researcher (Shenton, 2004). I confirmed my study by sending the transcripts to the participants for corroboration of the findings. Findings were presented and justified through the liberal use of direct quotes from the participants; thus, confirmability was reached by determining that the findings, interpretations and conclusions are supported by the data.

Ethical Considerations

The ethics of research seek to establish trust between the researcher and participants, regardless of the methodology employed. Establishing this trust is especially important when conducting a qualitative study since social scientists "have an ethical obligation to their colleagues, their study population, and the larger society" (Berg, 2001, p. 39). There are two main issues of ethics: anonymity and confidentiality (Patton, 2002). Although many times these two terms are used interchangeably, each one has a unique meaning. According to Berg (2001), confidentiality is "an active attempt to remove from the research records any elements that might indicate the subjects' identities," whereas anonymity "means that "the subjects remain nameless." through the use of survey questionnaires or other means (p. 57). Since maintaining confidentiality is an issue which has arisen in recent years, it is also one of the most challenging. Patton (2002) explained that there is a difference between confidentiality and anonymity. He stated that "confidentiality means you know but won't tell" whereas "anonymity means you don't know, as in a survey returned anonymously" (p. 408). Clear specifications must be established up front in terms of what the researcher commits or does not commit to be confidential. Options such as the alternative of using real names or aliases, where the data will be stored, and for how long the data will be kept are part of the confidentiality issue. Due to the characteristics of my study, anonymity will not be possible; however, confidentiality to the extent permitted by law will be guaranteed to all participants.

Due to the design of my study it is impossible to maintain anonymity since I know the participants. However, the identity of the informants was protected by replacing their names with pseudo-names. Also the purpose of the study was explained to participants in order to avoid "deception about the nature of the study" (Creswell, 1998, p. 132). Another ethical issue taken into consideration is when participants "share information off the record" (p. 133). It is easy not to include the information during the analysis; however, Creswell stated that it becomes a conflict when that information might harm individuals. A part of ethical consideration is the matter of having the researcher sharing personal experiences with informants. I maintained a minimum of sharing information from my part with participants. Creswell explained that this sharing "minimizes the bracketing that is essential to construct the meaning of participants in phenomenology" (p. 133). Maintaining confidentiality is not only replacing real names with aliases, but also a clear specification on how and for how long the data will be stored. At the end of the study and after a period of 5 years according to the regulations of the IRB, the data will be destroyed.

Besides anonymity and confidentiality as main components of ethics, Schwandt (2001) mentioned the use of *informed consent*, *avoidance of deception, harm, or risk*, and *accuracy in telling the story*. The informed consent is "the process of obtaining voluntary participation of individuals in research based on a full understanding of the possible benefits and risks" (Project Gold. Glossary of Research Methods Terms, n. d., ¶ 3). I will use the Informed Consent Form, to guarantee confidentiality to my participants (see Appendix C).

Chapter Summary

CCT is the topic of the phenomenon I intended to study through my research. My underlying epistemology or paradigm was Postmodernism, because Postmodernists believe that people are active participants in their own and other people's lives, and because they also believe that the world influences people's lives. CCT is a dynamic between trainer and trainee where knowledge and truth are open to be negotiated. During

CCTs, trainers and trainees are engaged in a unique social and cultural interaction typical of social constructivism. Trainers and trainees create their own social construct as a result of the unique experience derived from training.

The tradition chosen to guide the study was Phenomenology because I tried to understand the information that was gathered from the six executives who had directly experienced the phenomenon. Among the different Phenomenologies, I chose Husserl's Transcendental Phenomenology for this study because once the phenomenon of CCT is interpreted by the researcher, a truly phenomenological attitude, in which ordinary experience is left behind to reach transcendental meaning, will emerge.

The sampling design for my study was purposeful and criterion sampling because the six executives interviewed constituted information-rich cases, and they all had experienced the phenomenon of CCT.

Data collection was conducted by the use of in-depth interviews with standardized open-ended questions. The interviews were recorded and the data was transcribed. Collected data was analyzed using the constant comparison method. Findings were presented as the answers were responded to, by the interviewees' grasp on clusters.

Evidence of truth was provided by triangulation through auditing, member checking, and peer debriefing. In order to comply with the Institutional Review Board requirements, I had my participants sign the Informed Consent Form to guarantee them confidentiality. Every possible attempt was made to successfully comply with the ethics and regulations of the IRB hoping that the research study will contribute to the HRD community in particular and society in general.

CHAPTER IV

RESULTS OF THE STUDY

Introduction

The purpose of this phenomenological study was to explore the impact of Cross-Cultural Training (CCT) on executives' socio-cultural adjustment and performance during international assignments. The selection of the participants for this qualitative study was purposeful, criterion-based sampling. Six executives from international companies, who received CCT, were selected for this study. The method of data collection was face-to-face interview. The type of interview used was the standardized, open-ended interview questions (see Appendix B). Interviews were limited to one interview per participant; the length of each interview was approximately one hour.

Participants signed the Informed Consent Letter and completed the demographic information before the interview began (see Appendices C and D). The process of the interview consisted of three sections. The first section of the face-to-face interview was for socialization with the interviewees, in order to put participant at ease. The second section of the meeting was dedicated to the gathering of information. Finally, the third section was a conclusion and closing of the interview.

Tape recorded interviews were transcribed by the researcher. Once transcripts were completed, each interviewee was asked to verify her/his transcript of the interview; the participants spent approximately 30 minutes each in reviewing the transcripts. Therefore, participants dedicated approximately 90 minutes to the project (60 minutes for the interview and 30 minutes to review the transcripts).

Once all participants confirmed the accuracy of their transcripts, the tapes were destroyed, as required by the IRB. Transcripts were stored in the researcher's home in a locked file. The Informed Consent Forms and any documents that may contain participants' identifiers were filed and locked separately. All data will be destroyed after five years. The gathered data was analyzed through constant comparison; findings are presented according to the research questions.

Demographics of the Participants

Participants were recruited from different international companies. The researcher contacted international executives who had participated in CCT and had been on international assignments. The initial contact with participants was through a letter (see Appendix A). The first six people who responded, agreeing to participate in the study, comprised the sample of this study. In order to protect the participants' identity, pseudo-names were assigned (e.g., CCT-1, CCT-2) in place of actual names. Table 4.1 provides the demographic of the participants by gender, age, country of origin, country of relocation and years in their profession.

Participants ranged in age from 38 to 62 years. The group included two women and four men. The ethnic composition of the group was three South Americans and three North Americans. The years of experience in the international companies ranged from 4 years to more than 21 years.

Table 1 Participants' Demographics

Participants	Title	Gender	Age	Country of Origin	Country of Relocation	Years Working in International Companies
Participant CCT-1	*Manager of International Operations*	*Male*	*65*	*Uruguay*	*USA*	*12 years*
Participant CCT-2	*Manager*	*Female*	*61*	*Argentina*	*USA*	*5 years*
Participant CCT-3	*Vice-President*	*Male*	*38*	*USA*	*Argentina*	*12 years*
Participant CCT-4	*Manager*	*Male*	*62*	*USA*	*Peru*	*20 years*
Participant CCT-5	*President*	*Male*	*62*	*Argentina*	*Chile*	*18 years*
Participant CCT-6	*President*	*Female*	*62*	*USA*	*Gibraltar*	*10 years*

Participant Demographics and Work History

Participant CCT-1: male, 65 years old, born in Uruguay and relocated to the United States as a Manager for the last 4 years. He has been working for the company for 12 years.

Participant CCT-2: female, 61 years old, born in Argentina and relocated to the United States as a Manager for the last 4 years. She has been working for the company for a total of 5 years.

Participant CCT-3: male, 38 years old, born in the USA and relocated to Argentina. He served as a Vice-President of sales for a telecommunication services for 2 years. He has been working for international companies for 12 years.

Participant CCT-4: male, 62 years old, born in the USA and relocated to Peru as a Manager. He occupied this position for 3 years. He has been working for international companies for more than 20 years.

Participant CCT-5: male, 62 years old, born in Argentina and relocated to Chile before coming to the USA. He served as the President of the Company for 5 years and has a total of 18 years working for international companies.

Participant CCT-6: female, 62 year old, born in the USA and relocated to Gibraltar. She served as the President of an investment company for 3 years and has a total of 10 years working for international companies.

Findings

The overarching research question was, “What is the impact of CCT on executives’ social-cultural adjustment and performance during international assignments?” In response to the research questions, six themes emerged from the participants’ responses; two of the six themes emerged as very prevalent issues, not necessarily as direct part of the CCT, but as part of the HRD function. Table 4.2 illustrates the themes that emerged. Through the research question and sub-questions that explored four prevalent issues (Perception of the CCT, Benefits of the CCT, Gaps of the CCT, and Recommendations for Future CCTs), six themes emerged and developed:

1) CCT greatly enhances executives’ preparedness to deal with a new culture and, thus, has a positive impact on performance.
2) CCT enables better adjustment and faster adaptation, allowing executives to concentrate on performance.

3) CCT needs to include more topics on the socio-cultural aspect of the training, to remove anxiety and speed adjustment.

4) CCT needs to be customized to age and specific location.

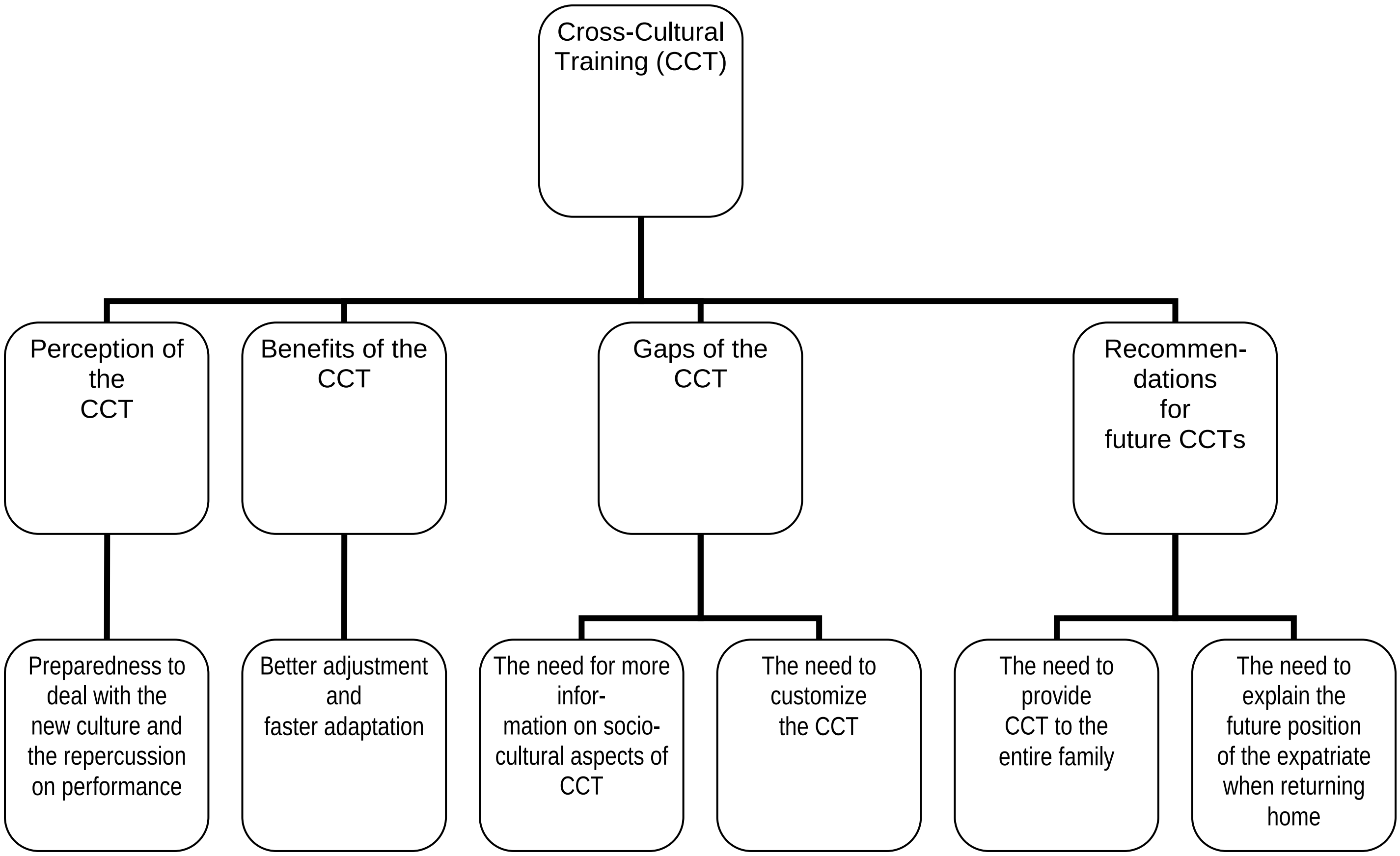
5) HRD needs to consider offering CCT to the entire family.

6) HRD needs to explain the future position of the expatriate upon his/her return home.

Even though items 5 and 6 are not direct functions of CCT, as was explained above, they are issues that came up as very important as per some of the participants; therefore, they must be considered as part of the HRD function.

The responses were analyzed holistically in order to obtain the actual essence of the participants' perceptions of the impact of CCT on the professional and social aspects of their lives. Participants were asked to think back and express their opinions of the CCT they received and how the training influenced their social and professional life. They were asked to provide a detailed account of the experience, naming both the most beneficial and the most challenging aspects of the CCT. Once all statements were gathered, the researcher gave each statement equal weight and compared each statement, purging any duplicate statements. Next, the researcher analyzed the participants' statements unfolding their individual perceptions of the phenomenon. Finally, answers to the overarching research question and sub-questions were formed.

Figure 5 Emergent Themes



Issue # 1: Perception of the CCT

CCT greatly enhances the executives preparedness to deal with the new culture and, thus, has a positive impact on performance. All participants agreed that the CCT prepared them relatively well to deal with the new culture, therefore, allowing them to better concentrate on performance.

For instance, CCT-3 stated, “I found it [CCT] very, very important and helpful to have any kind of success in the country . . . because what I was always fearful of is either insulting someone, not adapting to the local cultures or ways . . . social culture and business culture.”

Similarly, CCT-2 explained,

> The training I received made me feel very, very secure, especially when dealing with my co-workers and nationals. But later, I realized I needed more information. For example, many times I was worried about what to wear in the office; you always want to look good and professional, but here [Miami] everybody is too casual. Then, for example, in my country everybody kisses, and for example when people were coming to the office from an international branch, I never knew what was the most appropriate way to great them. Was it going to be a handshake? A kiss? I did not want to seem too distant, but neither too friendly because, I understood this is Miami, but there were Americans too. I used to worry a lot about those silly things. I used to worry more about those things than about my job! That is why I say that I needed much more information. Had I had more information I did not have to worry about it [cultural issues] Now, I do not realize [that I know those things] because I got used to, but I see other people going through what I went through and how much that affects their jobs and their lives in general.

Participant CCT-6 mirrored CCT-2’s perceptions, stating that:

> I found CCT not only useful but extremely interesting. It gave me an appreciation for cultural differences, lifestyles, business conduct, and currency exchange. Being aware that work habits differed from American standards was helpful as well. While I lived in Gibraltar, ruled by England, it was valuable that I understood the Spanish culture as well. The Gibraltarians tend to have cultural habits similar to their Spanish neighbors. But you really never know what is the most appropriate [thing] to do until you are there and experience these situations, or embarrass yourself. At the beginning [of the relocation] I had to constantly ask my secretary about the most simple things, how to dress for the meetings, or to go the business parties, the time of the meetings, if I should be there on time, or be there 15 or 30 minutes late. I did not like that because it was a distraction for me. I usually do not worry about those things in the States. It [lack of information on cultural issues] made me feel very insecure, and it had nothing to do with my job. But there were other things in which the training helped me. For example, when it was necessary to purchase office supplies, it was best NOT to go into town or call for delivery anywhere between 11:30 am and 1:30 pm as everyone was on their extended lunch break, or *siesta.* Knowing things like this saved me time and frustration.

CCT-2 also added that training was not only informative but, also interesting and that she knew that “without the training, I would have been seriously embarrassed in several circumstances.”

To reiterate the importance of CCT in the participants' professional and social lives, participant CCT-2 went on to say, "If you do not know these things [the way nationals live, the way they conduct business, etc], they might turn into a problem interfering with your professional life. In other words, these uncertainties can create conflicts, stress in our lives, and this is something that would damage our future as a professional and as social beings for the rest of your assignment in the foreign country." Participant CCT-1 said that:

> Even though the information [CCT] was not specific, when I started working here [Miami] I had some ideas of how things were. So what I did the first month or so, was to pay attention to the people in the office - if the guys wear ties, if they shook hands, and little by little I got the idea. There were times I found myself too worried about these issues . . . and I needed to concentrate on my work . . . you know I was trying too hard to say the right thing and do what was expected . . . I did not want to embarrass myself . . . it is not that I do not know how to behave, but I know that it was different from my country. So . . . in a way I was prepared, but you are never 100% prepared until you get here [Miami].

Participant CCT-5 stated:

> To answer to your question, yes the training prepared me to a point, but I got much more from years working in other countries. The truth is that the training is not enough. I have had guys, young guys, [expatriate employees] that I had to tell them O.K. pick up your things and go back home. They were miserable [during the international assignment]. They would leave their homes early in the morning

> and the wife was complaining about something, they would return at night [and] the wife was still crying or complaining because the gardener was two hours late or because she went to the market and instead of chicken they gave her fish. Well, those things . . . So every morning you have a person working there, for whom it is not that easy to adjust, and who on top of that, has a wife who is making his life more miserable . . . that guy cannot work [like that]. I'm sorry, but there is no way the person can concentrate on what we needed him to concentrate.

Even though the CCT was helpful and successful for most of the participants, they agreed that the second best source of information was other expatriates who were already living in the country of relocation. Participant CCT-3 stated that "normally, the CCT will come from a local, from another expatriate . . . and I found it invaluable. Definitely, I always put attention to what to do, what not to do, what I can say, what I cannot say." Participant CCT-5 added that "You get the information first-hand from people you might be relieving. That was my case. I was relieving another president that was (sic) leaving the assignment, so I sat with the guy roughly for 3 months before I took the job. So I listened to all his experiences, not only the job experience but also about family, government and so on…" This experience from participant CCT-5 might coincide with participant CCT-4 who stated that the best way to get the CCT is "sending someone [the Cross-Cultural Trainer] to live in the country for 3 to 6 months to experience the culture before teaching about it."

While each participant had his or her opinion about how important CCT was and how it prepared him/her for social adjustment and better performance, other themes emerged in response to the two sub-questions about the benefits and gaps of the CCT. There is also a recommendation aspect that emerged for the future of CCT and that will be extremely useful for future consideration. It should be noted that the participants' answers to interview questions supported the overarching research questions and its two sub-questions. Those questions will be answered in the following section.

Issues # 2: Benefits of CCT

As indicated previously, all six participants found CCT to be extremely useful, in that, the following theme emerged:

CCT allowed for better adjustment and faster adaptation to the new culture. It was the overall consensus of participants that there were major advantages associated with undergoing CCT. All participants agreed that the most important aspect of the CCT was the one related to the social aspect of the training. Thus, the emergent theme was the aspect in which CCT enabled participants to better adjust and faster adapt to the new country, allowing them to concentrate on performance.

Participant CCT-1 stated that "the training I received made me feel very, very secure, especially in dealings with my co-workers and nationals. The most important part of the training was the social aspect with topics such as way of living, environment, dress code or attire, customer appreciation…. These issues were very important."

The following responses further exemplify the theme. Participant CCT-3 explained that the most beneficial aspect of the training was not necessarily from the business side, but the social aspect of it:

> because there are certain things in business you can and cannot do.. . In Latin-America I learned very quickly that there is more a relationship, whereas here [the U.S.] it is more . . . there is not much of relationship. People are more willing to do business with somebody that they do not necessarily know whereas in Mexico or in Argentina they want to know you, they want to be sure they can trust you. Perhaps a longer sales cycle . . . but it is a relation that lasts for a long time. I like the relationship way of doing business. But what was most beneficial for me and my wife was more the social aspect. . . what to do, what not to do.

Participant CCT-5 explained that

> It is hard to point to one [beneficial] issue or one item saying this is the most beneficial. . . Moving to a foreign country on a foreign assignment is a complex scenario. It is many issues together. You have education issues for your kids, social issues for your family, relations with employees that you don't know, but you know they behave differently. Not because they are worse or better than you, but simply because they have a different way of living. So that is kind of hard to be prepared for . . . you might get the idea, you might get the explanation, but you might have to live it first hand [to understand it].

Issue # 3: Gaps in CCT

The third area of focus of the study was related to the gaps in the CCT, or the challenging aspects of the training. After analyzing the data, it become clear that even though participants strongly believed that the training was very positive and helpful, four of the six stated that the training was too short and failed their expectations. Thus, two important themes emerged: 1) the need for more information on the socio-cultural aspect of the training, and, 2) the need to provide customized CCT, taking into consideration not only the age of the executive sent abroad, but also the specific location where he/she is being relocated.

CCT needs to include more topics on the socio-cultural aspect of the training to remove anxiety and speed adjustment. Regarding the lack of emphasis on socio-cultural issues during the training, participant CCT-2 explained that she was very disappointed, since she was expecting more explanation related to the social setting. As she stated:

> The information was not enough. Different countries have different ways of socializing. In my particular case, I'm coming from a Latin culture, social relations, the way we interact with other people, is completely different. Social gatherings are not organized in the same way. We do not do these things in advance; you do not need an appointment to go and visit a friend. Also, the way we manage time. For example, the time Americans eat; the time you go to a restaurant is very different. Also, the type of food. All this information is very important if you want to adjust and adapt to a new country, and I felt the training did not provide enough of this.

She explained that the CCT briefly touched on "rules of communication and socialization . . .but later I realized that I needed much more information."

Participant CCT-1 mirrored the beliefs of participant CCT-2 by saying that the aspects that did not work for him were: "The social relations with people was not described like it really was." He kept on saying that "We are coming from countries where friendship is different . . . to find the same level of friendship that we have in our country, it is not easy."

Participant CCT-2 went on to say that there was a need to better explain "ways of living and doing things, the everyday living interaction with people." Participant CCT-3 stated that:

> Other than language [training] of course -- language lessons is by far the most important thing -- I think that the most important is social… you spend half of your life in your office and the other half within the community you are in. Being able to adjust and adapt to the local community, and how you go about your business . . .it is much more important… especially if you bring your family . . . that is by far the most important thing.

CCT needs to be customized to the age and specific location. All participants indicated the CCT must be customized to the executive, to his/her position, and to the region to which he or she is being relocated.

For example, CCT-1 stated that "… the impression I got from the training was that it was too light; it provided general information, not particular one [about socio-cultural issues]. We did not get any specific information regarding the specific place where we were going to get the job. The training was regarding (sic) to the States [USA] in general." Furthermore, participant CCT-4 articulated that the training "somewhat prepared me, but not to the extent needed. But this, I don't believe is possible." This opinion coincides with that of participant CCT-5, who also added to the issue, saying, "In general it [CCT] was useful: was it 100% correct? No, but it gave you a head start in many issues."

Participant CCT-1 stated that another point in which he felt the training was weak had to do with the need to make the training more localized to the area where the executive is going to be relocated, since there is a need to know "particular regulations related to each county, not the country, but the county [city] where you have to live." The other very important aspect he emphasized was the age of the executive who is going to be relocated, explaining that this is going to be an important aspect to consider when designing and delivering the training because "how you receive the information is different, depending on your age. If you are young and you are single you will receive it in one way . . . you are going into a new adventure. If you are married, you have kids, probably you are starting a new life overseas. If you are not so young, it is a difference, and the training you will receive, it will be different too."

Participant CCT-1's opinion is very similar to that of participant CCT-5, who stated that "Different ages with different scenarios requires different things . . . at this point I'm 62, going on 63; my kids are out of college -- my preoccupation is more my social life and how well I'm going to make it money wise. What is going to be the retirement plans, what is going to be the benefits 5 years down the road? . . . [This is the] opposite of 20 years ago [when] I was concerned about the schools that were available for my kids . . . . what kind of social life my kids were going to have." Participant CCT-1 stated that “The training has to be related to the position, the training has to be related to the age, and the training has to be directed related to the area where the person goes. It has to be fully integrated.” Participant CCT-4 went as far as to say that the training showed “simply [a] lack of true knowledge of the customs and thinking process.”

To emphasize the importance of customizing the training, in relation to the location, participant CCT-6 said that even though she “found the training covered most of the experiences and differences,” she could have used more information about monetary exchange rates as well as banking hours, since she was dealing with investment. She stated that, “In Gibraltar, it seemed that there were more *Bank Holidays* or *Queens Birthdays* [so] I always had to check and see if the bank was open… I should have learned more about their holiday traditions.”

Issue # 4: Participants’ Recommendation for CCTs

Interesting recommendations or topics to be consider for future CCT emerged for the data collection. Two themes emerged as a result of this: 1) the need to provide CCT for the whole family; and, 2) the need to discuss the future position of the expatriate upon his/her return home. Even though these are not directly a function of CCT, they are definitely a function of HRD and, therefore, must be considered.

The need to provide CCT for the entire family. As explained above, even though providing training for the entire family is not a direct function of the CCT, it is an issue that needs to be considered as part of the HRD function.

For example, participant CCT-3 stated that the “CCT should not only be for the person, for the business manager; it should be for the entire family. I think that that makes an expatriate assignment much easier for the family to adapt. But from what I have seen, normally the training only includes the person that (sic) is going to work; it does not include the family." He explained that having families prepared, too, could remove most of the anxiety from the executive and allow him/her to concentrate more on his/her work, therefore, improving performance.

Participant CCT-5 also commented on the importance of providing the entire family with the training since that was left up to him, he stated, "you are faced with the responsibility of explaining to your family what you have received."

Participant CCT-5 continued on saying that:

> The truth is that the training is not enough. I have had guys, young guys, [expatriate employees] that I had to tell them O.K. pick up your things and go back home. They were miserable [during the international assignment]. They would leave their homes early in the morning and the wife was complaining about something, they would return at night [and] the wife was still crying or complaining because the gardener was two hours late or because she went to the market and instead of chicken they gave her fish. Well, those things . . . So every morning you have a person working there, for whom it is not that easy to adjust, and who on top of that, has a wife who is making his life more miserable . . . that guy cannot work [like that]. I'm sorry, but there is no way the person can concentrate on what we needed him to concentrate

The need to explain the future position of the expatriate upon returning home. The last important theme that emerged from the research was the need to openly talk and discuss with the expatriate his/her future position upon completion of the international assignment. Even though this not a CCT function, it is an HRD function and must be addressed. Participant CCT-5 said that in training, nobody mentions what happens with an expatriate upon his/her returning to his/her home country. "Usually the expat, [expatriate] unless it is a president . . . a manager in a higher position which keeps him in contact with the main office . . . in 2 years everybody is going to forget that you exist. So that is never mentioned in any training, and you might end up being a number in the inventory. That is something that is very bad for your future."

The overall responses made by the participants were later categorized and common responses and quotes were separated. Each issue and theme has its own common quotes. Table 4.2 further demonstrates the emphasis that these quotes place on the emerging issues and themes:

Table 2 Common Quotes by Participants

ISSUE	QUOTES
Impact of CCT	• *Very, very important* • *Very necessary* • *Very, very important and helpful to have any kind of success in the country and in your work.* • *Help me to adapt very, very quickly*

ISSUES	QUOTES
Benefits of CCT	• *Made me feel very secure and comfortable* • *I learned very quickly that I needed to adapt in order to adjust* • *[Had not taken the Training] I know I would have been seriously embarrassed in several circumstances*
	• *I was able to concentrate more in my work* • *I was not as worried as I thought I was going to be* • *It [CCT] allowed me to concentrate in my work because I know what to expect* • *I know about greetings, clothes, time, so I felt secure and I did not worry about embarrassing myself*
Gaps of CCT	• *Too training was too general, too broad* • *The training did not provide enough information on socio-cultural issues* • *Differences between cultures . . . that was the longest adjustment* • *Training needs to be designed to the location* • *Topics need to be related to your family life and your destination* • *Training has to be related to the age, and directed related to the area where the person goes* • *How you receive the information is different depending on your age* • *I should have learned more about their holiday traditions* • *CCT should be offered to the entire family (including language lessons)*

- *So that [your position upon returning home] is never mentioned*

Chapter Summary

Chapter IV presented the introduction, participant demographics, findings, summary of findings, and summary. The purpose of this study was to explore the impact of CCT on executives' socio-cultural adjustment and performance. The selection of the participants for this qualitative study was purposeful, criterion-based sampling. Six executives between the age of 38 and 62 were selected for this study. Participants were recruited from different international companies. They all had been on international assignments, so they had participated in CCT. The group of participants included two women and four men. The ethnic composition of the group was three South Americans and three North Americans, and the years of experience in the international companies ranged from 4 years to more than 21 years. A comprehensive demographic description of each participant was provided. In addition, a detailed, analyzed description of the participants' responses was presented, including the primary emerging issues. Participants reflected on their individual experiences undergoing the training and provided a detailed account of their experiences.

From the research questions and the two sub-questions, six themes emerged and developed:

1) CCT greatly enhances the executives' preparedness to deal with the new culture and, thus, has a positive impact on performance
2) CCT enables better adjustment and faster adaptation, allowing executives to concentrate on performance
3) CCT needs to include more topics on the socio-cultural aspect of the training, to remove anxiety and speed adjustment
4) CCT needs to be customized to age and specific location
5) HRD needs to consider offering CCT to the entire family
6) HRD needs to explain the future position of the expatriate upon his/her return home.

A comprehensive discussion on the phenomenon of CCT took place. The overarching research question and the two sub-questions of this study were answered during the interview. The analysis of data showed that executives regard the CCT as important and a determinant on the process of adjustment and adaptation to the new culture.

The results of this study indicated that Cross-Cultural Training (CCT) is an important aspect of the executives' international assignments. Among the benefits associated with undergoing CCT was the issue related to the social aspects of the training. It was the overall consensus of participants that there were major advantages associated with undergoing CCT. One of the aspects is that CCT enabled them to better adjust and faster adapt to the new country allowing them to concentrate on performance.

On the other hand, participants all agreed that there are areas of needed improvements for CCT. This study determined, through the participants' discussions, that there was a need for including much more information about the social-cultural aspects of the country of relocation. Many suggestions were offered such as to include the entire family in future CCT, for better prepared trainers and a more open and honest explanation of the professional future of the expatriate when the international assignment is completed.

The issues and themes that resulted from the detailed and exhaustive explanation of the findings could provide important information to international companies and the way they perceive and offer CCT to their executives.

CHAPTER V

DISCUSSION OF THE FINDINGS

Introduction

The purpose of this phenomenological research study was to gather information on the impact of Cross-Cultural Training (CCT) on executives' socio-cultural adjustment and performance during international assignments.

Chapters I through IV presented the background of the problem, a review of the literature, the methodology used to conduct the study, and its findings. Chapter V provides an overall summary of the study, including a discussion of the findings, the conclusion, limitations, implications, and recommendations for further research in the area of CCT.

Summary of the Study

Purpose

The purpose of this study was to contribute new knowledge to the field of Human Resource and Development (HRD) by exploring the impact of CCT on executives' socio-cultural adjustment and performance during international assignments. There is a need for a deeper and a more comprehensive understanding of CCT and its repercussions on later performance. Thus, this study sought to provide new knowledge in CCT, which should contribute to speeding the process of socialization and adjustment of expatriates, thus contributing to their performance.

Significance

There is a need for deeper understanding of cultural differences and the corresponding adjustments of content for HRD practitioners and training consultants. Effective delivery of CCT will secure a smooth process of adaptation and socialization to the new culture, impacting executives' performance.

Additional research is necessary to promote more effective CCT to secure an effective transition through the socialization and adjustment process, in order to secure the best performance from expatriates. The results of such research will offer numerous implications for HRD practitioners and training consultants.

Methodology

The methodology used in this qualitative research study is based on the phenomenological tradition. The sample was comprised of six executives purposively selected from international companies in the USA.

The method of data collection was face-to-face interviews. The type of interview used was the standardized, open-ended interview (see Appendix B). Interviews were limited to one per participant; the length of each interview was approximately one hour.

Participants signed the Informed Consent Letter and completed the demographic information before the interview began (see Appendices C and D). The interview consisted of three sections. The first section focused on socializing with the interviewee, to put the participant at ease. The second section of the interview was dedicated to the gathering of information. Finally, the third section was the conclusion and closing of the interview.

Tape recorded interviews were transcribed by the researcher. Once transcripts were completed, each interviewee was asked to verify her/his transcript from the interview. Once all participants had confirmed the accuracy of their transcripts, the tapes were destroyed as required by the IRB.

Limitations

Generally speaking, qualitative studies have their own intrinsic limitations (Patton, 2002). In this case, for instance, one of the limitations was that the study was restricted to participants currently residing in the U.S. Even though participants were carefully chosen to represent the phenomenon, global nomads are located all over the world, and in this study the researcher worked only with executives from international companies from South and North America. Another limitation is that the researcher worked under the assumption that all participants were open and free to answer the questions and were telling the truth.

Personal bias was another limitation since the researcher has personally experienced the phenomenon more than once on both sides: as a trainee and as a Cross-Cultural Trainer. However, the researcher set aside these experiences and allowed the data to speak for itself.

A delimitation of the study was, as mentioned previously, the sample the researcher used. The sampling was limited in the sense that only executives from international companies from South and North America participated, leaving out a significant range of executives from all over the world.

Discussion of the Findings

The purpose of this phenomenological study was to explore the impact of Cross-Cultural Training (CCT) on executives' socio-cultural adjustment and performance during international assignments. The overarching research question was "What is the impact of CCT on executives' social-cultural adjustment and performance during international assignments?" There were also two sub-questions about benefits and gaps of the CCT. At the end of the data analysis process, and in response to the research questions, six themes emerged from participants' responses; even though two of the six emergent themes were not directly associated with CCT, they were prevalent issues associated with HRD functions. The six themes are as follows:

1) CCT greatly enhances executives' preparedness to deal with the new culture and, thus, has a positive impact on performance.
2) CCT enables better adjustment and faster adaptation, allowing executives to concentrate on performance.
3) CCT needs to include more topics on the socio-cultural aspect of the training, to remove anxiety and speed adjustment.
4) CCT needs to be customized to age and specific location.
5) HRD needs to consider offering CCT to the entire family.
6) HRD needs to explain the future position of the expatriate upon his/her return home.

The themes which emerged in this study and their relationship to the literature review in Chapter II will be discussed below.

Perceptions of CCT

All participants agreed that CCT greatly enhanced executives' preparedness to deal with the new culture and, thus, had a positive impact on performance. When participants were asked about their perceptions of the CCT they had received, the majority (80 %) agreed that they felt very comfortable and prepared to interact with nationals in the host country. As previously stated in the literature review, Cross-Cultural Training (CCT) has been considered a tool to promote effective cross-cultural interactions. This is the reason that more and more global HRD and international companies are becoming increasingly interested in understanding the effects of CCT, and to what extent this training really prepares expatriates to better adapt to a new country. The number of expatriates has increased considerably in the last 10 years and this is a trend that will continue (2003/2004 Global Relocation Trends Survey Report). Thus, "the role of cross-cultural training becomes increasingly crucial" when preparing executives for international assignments (Bhagat & Prien, as cited in Osman-Gani, 2005, ¶ 2).

When asked, participants of the study said that the cross-cultural preparation they received during the CCT allowed them to speed the process of adjustment and more rapidly acknowledge their sense of belonging in the new culture. They later realized that the CCT was paramount in adjusting successfully and behaving effectively in a new working and social environment. Participants stated that the training made them feel that they were going to be part of the new culture and also generated a positive feeling of anticipation. The participants expressed that, upon arrival in the host country, all the topics that had been previously covered during the CCT helped them to adjust quickly and definitely allowed them to set aside worries about the technical aspects of communication. This allowed them to focus exclusively on what they were supposed to do: perform at their best during the course of the international assignment.

In this study, participants unanimously regarded CCT as a key factor to facilitating the process of adjustment during overseas assignments. In general, participants agreed that CCT helped them to better understand cultural differences, but more importantly, it provided them with a smooth transition during adjustment to the new country. The literature previously explained cross-cultural adjustment as the level of psychological comfort which one feels in a foreign environment (Simeon & Fujiu, as cited in Osman-Gani, 2006), and this is precisely how many of the participants of this study expressed they felt upon arriving in the host country.

During each interview, all the participants agreed on how well prepared they felt after receiving CCT, and how being aware of cultural differences made them feel more comfortable, able to adjust, and free to concentrate on their assignments. Thus, the majority of the participants' responses clearly expressed the significant impact of CCT on their social and the professional levels when sent abroad. That is why, as is stated in the literature, it is ideal to view the HRD practice in general and CCT in particular from a socio-cultural perspective, because it reminds people that their behavior is influenced not only by those around them but also by the particular culture in which they are immersed (Carioni & Mucenic, 2007). When executives perceive that they are ready for the new culture, as many of the participants in this study experienced as a result of the CCT, they perceive themselves in a more positive way, which allows them to overcome uncertainty and more quickly adapt to the host country. Many companies that are successful in their own countries fail in the global marketplace, due in large part to their lack of intercultural awareness. Thus, the role of CCT becomes increasingly significant in helping expatriates to journey smoothly through the process of learning and effectively adapting to the host culture (Rogers & Steinfatt, 2000). By fighting uncertainty, because they have the knowledge required to do it, the participants removed their anxiety from the social aspect of their new venture, thus concentrating only on the most important thing: their jobs. Jones (1977) stated that there is a strong relation between "a person's expectation of success and both the objective probability of success and the effort expended in pursuit of the goal" (¶ 3). All participants in this study anticipated success as a result of the combination of the objective probability of success (they were professionally prepared for the international assignment) and the effort expended in pursuit of the goal (undergoing CCT).

According to Schaffer (2006), when executives working on overseas assignments are faced with the need to make social group selections, behave professionally and feel conformable with it, expatriates need to know to what extent their values system is congruent with the values system in which they are immersed. Therefore, it is expected that they will have a preference toward certain social issues that they will be presented with in everyday interactions. This is where the importance of CCT and its effects reveals itself. When executives have undergone an intensive and effective CCT, they will have enough information, and more importantly, confidence to make selections that make them feel comfortable, rather the awkward or out of place if compared with the rest of their co-workers or nationals. This provides them with the sense of security needed to perform their jobs adequately.

CCT prepares executives to deal with the new culture by providing them with the information they need to decide the appropriate routes to satisfy their needs without antagonizing or disappointing co-workers and nationals. This is something that in the long run will positively impact their behavior (overall performance for the purpose of the study, Maslow 1970 and Rokeach 1979).

Benefits of CCT

When participants were asked what they thought was the most beneficial aspect of CCT, the overall theme that emerged from their responses was that the training helped them to better adjust and more quickly adapt to the new culture, allowing them to concentrate on their jobs. The findings align with the current literature in which recent studies have provided information about the effectiveness of CCT on improving expatriate performance during foreign assignments. The literature explains the positive relationship between adjustment and performance, which reduces early return, enhanced skill development to interact in the new culture and, furthermore, develops self-confidence and overall feelings of well-being (Black & Mendenhall, as cited in Littrell, et al., 2006). In fact, lack of adjustment was found to be one of the most significant factors for expatriates' early returns.

CCT is a key factor in facilitating and speeding the process of adjustment during overseas assignments (Osman-Gani, 2005). As stated by participants of this study, CCT helped them to better understand cultural differences, but more importantly, it provided them with a smooth transition to adjusting in the new country. According to the literature, Osman-Gani (2005) found that between 16 to 40 percent of all expatriate managers (mostly American) return prematurely from their overseas assignment due to poor performance or failure in cross-cultural adjustment (Baker & Ivancevich, 1971; Black & Mendenhall, 1989; Dunbar & Ehrlich, 1986; Tung, 1981). Early returns and expatriate turnover is something that companies want to avoid at all costs.

In this study, participants agreed that the CCT made them feel secure and more comfortable in dealing with nationals. However secure, some participants stated that there were certain circumstances that were completely new for them, and they experienced temporary feelings of uncertainty, which according to the literature review is completely normal. Berg (2000) explained that "uncertainty reduction theory focuses on how humans communicate, and is used to gain knowledge and create understanding, since it is natural to have doubts about our ability to predict the outcome of initial encounters" (Berg, as cited in Griffin, 2000, p. 136). Since the participants of the study underwent CCT, they were able to remove their anxiety and predict the outcomes of initial encounters with which they were unfamiliar.

According to Maslow's (1970) Hierarchy of Needs, Level III, Belonging or Social Need, is a key need to be satisfied if the other needs (Esteem and Self Actualization) are to be fulfilled. An expatriate with an unattended need to belong may not accomplish much if he/she feels isolated, not accepted, and unable to participate in co-workers' and nationals' social activities. It does not matter how much job recognition that person might receive: The need for belonging is an important one that must be satisfied if Esteem and Self Actualization are to take place. Regardless of how much recognition expatriates have received in the past, if the needs to belong and socialize are not satisfied first, they might not accomplish much and might exhibit unexpected poor performance due to the lack of adjustment and poor interaction with nationals. The researcher was able to learn that the participants of this study were all regarded as excellent executives performing at their best before being relocated. Their professionalism and ability to deal with challenging issues was what landed them the international assignment. They were trusted and well regarded by their supervisors and that is why they were chosen as perfect candidates to be relocated. They only needed to be able to adjust to the host country to continue performing at their best. Fortunately, and by the way they responded to the protocol questions, all of them adjusted and adapted well to the new countries. Furthermore, they all agreed that CCT helped them to achieve that goal.

Swanson and Holton (2001) stated that economics has always been a driving force behind globalization, and that in order to keep up with it a systematic response from HRD is required. The need to compete and be part of the global market explains the transition whereby many companies move from domestic to global HRD. Relocation and expatriates are the direct results of globalization. Thus, to be successful and be able to compete in the global marketplace companies need to prepare their executives for the challenging international market. This is why, since globalization, the role of CCT has become increasingly important and it has been considered a tool to promote effective cross-cultural interaction (Adler 1986).

Gaps in CCT

There were two overall themes that emerged from participants' responses concerning the gaps of CCT: 1) The need to include more topics about socio-cultural issues as well as spend more time on them, and 2) the need to design customized CCT.

CCT needs to include more topics on the socio-cultural aspect of the training to remove anxiety and speed adjustment.

The literature suggests that demographics play an important role when comparing expatriates' genders, age groups, marital status, educational backgrounds and management levels, and that these differing demographics contribute to differences that ultimately affect the formation of social identity and its correspondent values. These factors determine the way expatriates will interact in the new country and vice versa; typical issues from the host country will ultimately impact executives' social identity. Schaffer (2006) explained that there are principles of social identity under which executives and employees, in general, will see themselves as similar or dissimilar to others according to each person's socio-cultural background and the sense (or not) they can make of other people's socio-cultural values. Having a better understanding of the country of relocation allow expatriates to make social comparisons in their environments, defining themselves along some social criterion (Tajfel, 1974; Turner, 1975, as cited in Schaffer, 2006). When executives are able to do this, they feel they are much more in control of their reality within that particular society, and that feeling is the stepping point needed for adjustment and adaptation to take place.

Osman-Gani (2000) found that in the training content for the CCT, socio-cultural issues were the ones expatriates preferred to learn. Executives prefer more data on socio-cultural issues because this knowledge provides them with the information needed to create and understand their and others' realities. This coincides with the findings of this study that revealed participants' desire to include more of these issues in their CCT. When participants were asked about the gaps of CCT, most of them agreed that it fell short in providing socio-cultural information on the country of relocation. Even though all of them had received information about the topic, they agreed that they could have used much more information upon arrival in the host country. This includes socio-cultural details on topics such as everyday activities, going to the bank, doing the grocery shopping, going to parties, and other such issues. They unanimously responded on the need to include more of these issues in the training content of the CCT.

In spite of abundant literature regarding the effectiveness of conducting CCT to improve expatriate performance and speed adjustment, Baiyin (2006) explained that "cultural differences have not been featured prominently in the literature" (¶ 1). Researchers (Osman-Gani, Littrell et al., Baiyin et al.) believe that there are many factors potentially moderating the relationship between CCT and expatriate performance. However, socio-cultural differences were identified as the most important factor influencing the relation between the participants of this study and their performance.

These differences, as the participants stated, are very significant when one is new to the country, and if not addressed adequately they can create misunderstanding and conflict.

As previously stated in the literature, Yang (2002) explained that in cross-cultural settings, there are two major psychological cultural patterns which vary: collectivism and individualism. The collectivist cultures give more importance to in-group goals. On the other hand, in individualistic cultures individuals' experiences are structured around autonomy (Yang). This is very important for expatriates to know. Many participants in this study expressed vast differences they experienced with regard to cultural patterns upon arrival in the new country and interacting with nationals, as compared to their native countries. All came from one type of society into another, and that was very challenging for them. The collectivist cultures give more importance to in-group goals. In cultures such as Africa, Asia, Latin America and in parts of Europe, people's "beliefs, attitudes, norms and values are organized around one or more collectives such as the family, the tribe, the religious group, or the country" (Yang, ¶ 3). This concides with the opinion of participants who were relocated to Chile, Argentina, and Gibraltar. They manifested how different people related with each other, and how business was basically conducted on the basis of establishing good relationships that many times ended up in friendships.

On the other hand, in individualistic cultures individuals' experiences are structured around autonomy. "People in individualistic cultures tend to give priority to their personal goals, even when these goals conflict with the goals of important in-groups" (Yang, 2002, ¶ 6). Examples of these cultures are the United States, Germany, and France. This phenomenon is exactly what the participants of this study manifested. Many of them, especially the ones coming from South America, experienced a certain amount of discomfort when first dealing with people in the U.S. since Americans are very distant and individualistic in comparison with the home countries. Therefore, it took them some time to adjust and, consequently, adapt to living with nationals in the States. Many of them talked about how hard it was to build friendships; others spoke about the differences in dealing with time, attire, and space, among other things.

Furthermore, the literature explained that when it comes to needs, *Maslow's Hierarchy of Needs*, the way they are satisfied differs from one culture to another. This is precisely why many of the participants of the study encountered some challenging situations when they first arrived to their host countries. There is an important difference in the way people go about satisfying their needs depending on whether they are from an individualistic or a collectivist culture. This is often the origin of conflicts and misunderstandings that every person, including the participants of this study, are to experience sooner or later if they ignore these differences. To illustrate this, Maslow (1970) explained that Esteem and Self-Actualization Needs, which are by nature very personal and individualistic, do not apply equally in all cultures. In collectivist cultures, these needs, Esteem and Self-Actualization, are intrinsic in relation to the group, community, or nation where they belong. Therefore, in the case of collectivist cultures, they will first place the needs of the community as a group and later apply their own needs, something that will rarely happen in an individualistic culture. This is why the participants of this study, who all were coming from one type of culture and going into a different one, agreed that understanding these differences and being able to make sense of them is extremely important in order to better adjust and quickly adapt to the host country. According to the participants of this study, CCT made them aware of these differences; however, considering the relevance of the issue, most of them felt that the training fell short of their expectations and that they could have used much more such information.

CCT needs to customized to the age and specific location.

Lack of customatization of the CCT was the other aspect that participants highlighted as a gap in the CCT they had received. Participants of the study expressed that in many cases the CCT was very light and broad. Four out of six participants explained that they could have used more concrete information about the specific cities to where they were being relocated. On this topic, Tung (1981) stated that there is the need to design CCT specifically oriented for the place the executive is going.

Furthermore, Tung explained that depending on the specific assignment, executives sent abroad might find themselves in different degrees of contact with the local culture and that these encounters might not be similar to those in the home culture. This is why it is extremely important to design the training so that it takes into consideration the specific location of relocation. This coincides with many of the participants' opinions on the difficulties they encountered with most simple everyday activities when they first arrived to the country of relocation. Again, many participants stated that they could have used much more information about the way things were done in the specific city of relocation. To further illustrate the topic, Littrell et al. (2006)

explained that it is very different for an American expatriate to be assigned to London that to be assigned to Africa, in terms of transferability of cultural norms, and this is something that must be taken into consideration when designing CCT.

The second gap participants noted was the need to design CCT that takes into consideration the expatriates' ages. As stated in the literature review, Knowles et al (2006) explained that the selection of instructional approaches depends on different factors such as conditions of learning, content, and demographics or characteristics of the students (trainees or expatriates for the purpose of this study). An important aspect to consider before selecting the instructional design and the content of the program is the specific needs that expatriates bring with them that are consequent with their age. Executives who are relocated are adult learners. As such, they have specific needs of adult learners that cannot be ignored if the goal is to deliver effective training. This is something that the majority of the participants in this study agreed on: that their age-specific needs were not necessarily addressed as they should have been, and that they could have used much more information pertinent to their interests at that particular stage in their lives. As one of the participants explained, 20 years ago when he was transferred the most important thing for him was the type of schools available for his children; now that his children are grown, he does not need to worry about that since he travels only with his wife when on international assignments.

Therefore, as the participants stated, there is a need for a deeper understanding of CCT and its degree of effectiveness on trainees' adjustment and performance. Issues such as cultural values, concrete information on the specific place of relocation, and the age of the expatriate on the international assignment must be taken into consideration to better design the training. It is the Cross-Cultural Trainer's responsibility not only to understand the cultural differences between parent and host cultures, but also to be able to explain those differences in a meaningful manner using appropriate instructional methodology and training content.

Participants' Recommendations for Future CCTs

The most prevalent recommendation of participants for the improvement of CCT was the need to include all family members in the training. If companies are going to continue being immersed in the global market and sending their executives overseas, including families in CCT is something they must consider. According to the *2005 Global Relocation Trends Survey Report*, companies generate 43% of revenues outside of their home countries; "consequently, it is not surprising that we are beginning to see worldwide consistency in employee expectations and demands as a result of the global dissemination of human resource policies, practices, concepts, and solutions" (¶ 1). Even though the trend is well known, many international companies still question the need for providing CCT to their executives and, moreover, the need to provide training to the expatriates' families. The literature reflected this tendency, stating in the *2003/2004 Global Relocation Trends Survey* that 60% of international companies provided cross-cultural preparation, but that the training was only mandatory at 26% of them. Lack of confidence in the CCT or possible lack of knowledge on the part of international companies might be the reason why many of them are so reluctant to consider CCT for the entire family. There is a lack of literature referent to providing CCT to families and its implications.

The majority of the participants of the study explained that they were somewhat trained on issues such as tolerance of culture ambiguity and willingness to live in a foreign environment; however, their families did not know about this so, they found themselves trying to explain these issues to their family members. They all agreed this was difficult. Tolerance of ambiguity and willingness to live in a foreign environment are important attitudes that should be required not only from the executive, but also for his/her family to understand. This is consistent with the literature which stated that tolerance of ambiguity and willingness to live in foreign environments are other important attitudes determinant in the adjustment process (Black & Gregersen, as cited in Osman-Gani, 2005; Brett, 1984; Oberg, 1960).

Furthermore, *the 2005 Global Relocation Trends Survey* showed that among family relocation challenges that were critical to executives, spousal resistance (4.4), family adjustment (4.4), and children's education (4.2) were the most critical one, followed by the spouse's career (3.5) (p. 44). Providing CCT for the entire family is a way to address these most critical issues.

If companies want to avoid executives' family-related problems that in one way or another will affect their performance, providing CCT for them and to their entire families must be a common practice. Training for the entire family is an issue that needs to be addressed now to avoid early returns and expatriate turnover. In their study, McNulty and Tharenou (2005) stated that premature returns costs an organization between US$50,000 to US$150,000 per executive per year (Black et al., 1990). The need to prepare expatriates to perform effectively is pivotal; so is the need to prepare the expatriates' families.

At these high costs, companies should soon understand that they must offer CCT training not only to the executive to be relocated but also the family traveling with him/her. The idea is that CCT provides expatriates and their family members with the necessary knowledge and ability to effectively adjust to produce successful interactions. Thus, CCT should provide the necessary components to address personal adjustment to the new host environment, professional effectiveness in accomplishing business responsibilities, and interpersonal adjustment (Baumgarten, 1995; Bennet et al., as cited in Littrell et al., 2006).

Fortunately, none of the participants involved in this study experienced early return or expatriate turnover; however, the ones who brought their families with them remember struggling to try to help their family members adjust and adapt to the new culture. In many cases, as one of the participants manifested, it was left to him to explain to his wife and three children the nuances of the culture that awaited them on the other side of the map. The participants that went through that experience recalled suffering great stress and preoccupation. Many times they shared that they found themselves completely involved in domestic issues when they should have been concentrating on business performance. They expressed that at times they felt compelled to pick up everything and return home, but managed and finally found the strength to stay and succeed, although it was not easy. If international companies want to eliminate or decrease the high cost they must pay for early returns or failures on international assignments due to lack of adjustment to the new culture, they must acknowledge the importance of CCT and provide it not only to the executives but also to their families.

HRD needs to explain the future position of the expatriate upon returning home.

The global trend has brought with it the need for developing global programs and CCT. Even though more and more executives are transferred from one country to another and much information is explained to them about the new assignment and what is expected from them, nothing is mentioned during the CCT about their future job when they return home. This is something that cannot be ignored and needs to be part of the topics discussed during CCTs.

Recommendations

The research presented in this study will contribute to the field of HRD. This research project was aimed at determining to what extent CCT impacts expatriates' social and professional adjustment. In conjunction with the literature, this study determined that there is a need to implement CCT as a common practice for international companies. Additionally, this study identified the need for a deeper understanding of cultural differences and the necessary adjustments of training content for HRD practitioners and training consultants. Furthermore, there is a need for tailoring the training so executives can feel their particular needs are being addressed. These issues are particularly relevant for multinational organizations. A deep understanding of cross-cultural differences during training will help HRD practitioners to deliver effective CCTs.

When expatriates are not culturally prepared for their international assignments, companies must face the consequences of early returns or expatriate turnover. A high percentage of expatriate managers return prematurely from their overseas assignments due to their poor performance or failure in cross-cultural adjustment. Premature return, or expatriate turnover, costs organizations significant amounts of money per year. This study found that expatriates with CCT perceived they had better levels of interaction, adjustment, and skill development necessary to perform effectively during overseas assignments.

Thus, again and again the key determinant in the preparation of executives sent abroad is how well they adjust in the host country. If international companies want to eliminate or decrease the high costs of early returns or failures on international assignments due to lack of adjustment to the new culture, they must acknowledge the importance of CCT and provide training not only to the executives, but also to their families.

Lack of adjustment was found to be one of the most significant factors in early returns. CCT is the key factor to facilitating the process of adjustment during overseas assignments. CCT helps executives to better understand cultural differences, but more importantly, it provides them with a smooth transition to adjusting to the new country.

Further research/proposed research agenda.

Additional research is necessary to explore the impact of CCT and to promote more effective CCT. More research focused on matching the trainees' socio-cultural backgrounds, ages, countries of origin and countries of relocation, needs to be taken into consideration to consequently provide a CCT tailored for each expatriate and his/her family's needs.

Further research should include surveys and interviews of families to find out more about executives' performance while on overseas assignments. Also, it is important to have HRD discuss with expatriates the professional situations in which they will find themselves upon returning home once the international assignments is completed. This is a very important issue and one of great concern that it is rarely included in the CCT.

Chapter Summary

Undergoing CCT is essential for executives sent on international assignments. As per the participants' experiences and the literature review it is not difficult to understand that it is pivotal to prepare executives before they are sent abroad. Even experienced executive can show signs of lower levels of performance if he/she does not feel conformable in the new country and is having adjustment problems.

It is hoped that this study will contribute to new knowledge in the field of HRD by providing cross-cultural trainers and HRD practitioners with a better understanding of cultural differences, and the information needed to adjust, as well as pertinent training content that will ultimately speed the process of socialization and adjustment for the expatriate. Finally and more importantly, it is hoped that this study will be a platform that will prompt international corporations' responsiveness to CCT and to genuinely understand the increasing need of this training as a tool to secure a smooth process of adaptation and socialization into the new culture.

This chapter has summarized the purpose, significance, methods, and limitation of this research project. Furthermore, this chapter discussed the findings of the research concerning the impact of CCT on executives' socio-cultural adjustment and performance during international assignments.

The discussion of findings revealed the need for a more conscientious evaluation from global HRD and international companies of the importance of CCT and its consequences on the social and professional performance of executives. Social adjustment and repercussions on performance are issues that sooner or later will impact and reflect on the ROI (Return of Investments) of international companies.

From the research questions certain themes emerged, which consequently were analyzed and led to overarching themes. The findings were discussed relative to the overarching themes and to the literature. Quality was verified by adherence to standards addressing the trustworthiness of the qualitative research and providing evidence of rigor, including credibility, transferability, dependability, and conformability (Patton, 2002).

The conclusion was drawn from the information acquired during the interviews and the coding process was described. Finally, recommendations were addressed, including the implications of this study and recommendations for further research in the area of CCT.

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APPENDIX A

Initial Contact with Potential Participants

(via e-mail)

Dear Mr. /Ms: __________________________

Your participation in a research project is requested. The title of the study is *Cross-Cultural Training and Executive Performance on International Assignments*. The research is being conducted by Angie Carioni, a student in the *HRD* department at Barry University, who is seeking information that will be useful in the field of Human Resources/Training and Development. The aim of the research is to explore the impact of Cross-Cultural Training on expatriates' socio-cultural adjustment on international assignments. In accordance with this aim, the following procedure will be used: a tape-recorded interview. We anticipate the number of participants to be six international executives.

If you decide to participate in this research, you will be asked to do the following: participate in one individual face-to-face one-hour interview, which will be tape recorded. In addition you will be asked to verify the transcripts of your interview, which will take an additional 30 minutes. Therefore, your total time commitment will be one hour and 30 minutes.

Your consent to be a research participant is strictly voluntary and should you decline to participate or should you choose to drop out at any time during the study, there will be no adverse effects on your employment. In addition, you will have the right to stop the recorder to answer a particular question and/or refuse to answer any particular question.

There are no known risks to you. Although there are no direct benefits to you, your participation in this study may help our understanding of Cross-Cultural Training (CCT).

As a research participant, information you provide will be held in confidence to the extent permitted by law. Any published results of the research will use pseudo names and no names will be used in the study. Data will be kept in a locked file in the researcher's office and the tapes will be destroyed after you have read the transcripts and confirmed them. The rest of the data will be kept for 5 years from the time the study is finished and then it will be destroyed. Your signed consent form will be kept separate from the data.

If you would be willing to participate in this study, please contact me by (date)________. Meanwhile, should you have any questions or need additional information, please feel free to contact me via e-mail (acarioni@aol.com) or telephone (305) 812-6114 - (305) 981-5524.

Thank you for your time and your consideration of this project.

Warm Regards,

Angie Carioni, Doctoral Candidate

APPENDIX B

Interview Questions

1) Please reflect back,
   What was your opinion of the Cross-Cultural Training you received?

2) Now that you have taken the international assignment and are relocated:
   How did you feel the Cross-Cultural Training prepared you for the international assignment?

3) What specific aspects of the Cross-Cultural Training were most beneficial to you?

4) What specific aspects of Cross-Cultural Training did not work for you and why not?

5) If you are ever asked to undergo another Cross-Cultural Training for another international assignment, what are the topics that you recommend to be included in the training?

6) Is there anything else about your experience with Cross-Cultural Training that you would like to add?

APPENDIX C
Informed Consent Form

Dear Participant:

Your participation in a research project is requested. The title of the study is *Cross-Cultural Training and Executive Performance on International Assignments*. The research is being conducted by Angie Carioni, a student in the *HRD* department at Barry University, who is seeking information that will be useful in the field of Human Resources/Training and Development. The aim of the research is to explore the impact of Cross-Cultural Training on expatriates' socio-cultural adjustment on international assignments. In accordance with this aim, the following procedure will be used: a tape-recorded interview. We anticipate the number of participants to be six international executives.

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As a research participant, information you provide will be held in confidence to the extent permitted by law. Any published results of the research will use pseudo-names and no names will be used in the study. Data will be kept in a locked file in the researcher's office and the tapes will be destroyed after you have read the transcripts and confirmed them. The rest of the data will be kept for 5 years from the time the study is finished and then it will be destroyed. Your signed consent form will be kept separate from the data.

If you have any questions or concerns regarding the study or your participation in the study, you may contact me, Angie Carioni, at (305) 812-6114, my supervisor, Dr. Betty Hubschman, at (305) 899-3724, or the Institutional Review Board point of contact, Ms. Nildy Polanco, at (305) 899-3020. If you are satisfied with the information provided and are willing to participate in this research, please signify your consent by signing this consent form.

Voluntary Consent

I acknowledge that I have been informed of the nature and purposes of this experiment by _________ and that I have read and understand the information presented above, and that I have received a copy of this form for my records. I give my voluntary consent to participate in this experiment.

Signature of Participant | _Date_

Angie Carioni	04/01/07		
Researcher	*Date*	*Witness*	*Date*

(Witness signature is required only if research involves pregnant women, children, other vulnerable populations, or if more than minimal risk is present.)

APPENDIX D

Demographics

Pseudo-Name of Participant: ____________________

Gender: ____________________________

Age: __________________________

Ethnicity: ______________________

Country of Origin: ___________________

Country of Relocation: _________________