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Expatriate adjustment: considerations for selection and training

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Abstract

Purpose – The purpose of this paper is to first, synthesize employee characteristics that have been shown to help expatriate adjustment into best practices that can aid in expatriate selection. Second, the authors aim to identify training design variables that can be implemented to not only increase learning and expatriate adjustment, but also to maximize the benefits of employee characteristics. Finally, the authors point out environmental factors that are often overlooked, but yet important influencing forces of expatriate adjustment.

Design/methodology/approach – PsychINFO was searched using variations of the following terms: expatriate selection and expatriate training. For the selection criteria, the authors selected articles in which cross-cultural adjustment, expatriate performance, or learning was the dependent variable. Reference sections of these articles were then cross-referenced for additional support. Authors then double-coded every article independently to record variables, study methodology, and research results.

Findings – The authors have identified cultural intelligence, learning orientation, technical KSAO's, and language skills to be the most significant antecedents of expatriate adjustment. Furthermore, the authors have found environmental factors (i.e. organizational, family, and interpersonal support) to play a crucial role in the adjustment process. The authors have also identified training factors (i.e. content, process, and elements) to be crucial, and the authors propose how these design variables further facilitate learning and adjustment.

Originality/value – This manuscript contributes to the extant expatriate adjustment literature by providing a new, integrative framework. While the individual variables explored within the paper have been examined in past research, this manuscript is the first to offer a framework which integrates them to shape future research.

Keywords Training, Selection, Expatriate, Adjustment

Paper type Conceptual paper

With the recent increase of globalization, at least 900,000 transnational companies exist (Odell and Spielman, 2009). This surge of international competition has caused the need for global strategic perspectives. Since companies now have a myriad of international business prospects (Liu and Lee, 2008), multinational corporations



(MNCs) seek out overseas opportunities in order to accumulate foreign markets. With this shift, management of human resources has become one of the leading challenges faced by international businesses. A human resource system capable of selecting and training globally competent employees must be properly implemented to assure organizational success.

By definition, an expatriate is a temporary migrant who is sent to reside overseas to complete an assignment before returning to his or her home country (Cohen, 1977). Seeing as expatriation is the most expensive staffing strategy utilized by MNCs (Selmer, 2001), it is vital that companies understand the extent of international operations. In order to maximize the benefits of expatriation, selecting and training capable individuals is imperative. Besides assuring the selection and training of the appropriate employees, the organization should also create an environment that encourages employees to transfer the learned materials to their new work environment (Baldwin and Ford, 1988).

The purpose of this paper is threefold. First, we synthesize employee characteristics that have been shown to help expatriate adjustment into best practices that can aid in expatriate selection. Second, we identify training design variables that can be implemented to not only increase learning, but also maximize the benefits of employee characteristics. Third, we suggest essential, underlying mechanisms that are often overlooked between employee characteristics and adjustment. For instance, we identify environmental variables that motivate expatriates to apply learned skills toward adjustment. Finally, to aid in the integration of selection and training of expatriates, we will provide a framework of expatriate adjustment and discuss its components in detail.

Criterion clarification: how to determine expatriate adjustment

Successful expatriates offer a plethora of potential benefits, including the transfer of managerial and technical knowledge, better control of foreign subsidiaries, improved communication, and more secure business transactions. MNCs must obtain well-suited candidates in order to bring about the aforementioned benefits (Rozkwitalska, 2012). If employees are not carefully chosen, there is a heightened risk of a failed assignment, including early returns (Solomon, 1996), repatriation (Kim and Slocum, 2008), low performance (Harvey and Wiese, 1998), and high turnover and transfer rates (Naumann, 1993). These failures come at a high cost to the parent company, costing upwards of \$1 million (Vögel *et al.*, 2008), and can be five to ten times the cost of a local hire (Wederspahn, 2000).

While the expatriate literature has offered a wide array of potential explanations for the aforementioned failures, a lack of adjustment to the host culture has been among the most prominent (Black and Gregersen, 1991). Adjustment has been defined as the extent to which expatriates successfully cope with the nuances of their new environment (Takeuchi *et al.*, 2005). Although the conceptualization of adjustment set forth by Black and Gregersen (1991) has been widely used within expatriate research, there are multiple measurement issues with this typology (see Lazarova and Thomas, 2012 for details). Therefore, we draw from a more theoretically driven conceptualization of adjustment, developed by Searle and Ward (1990), which suggests that adjustment is comprised of two distinct yet related facets: psychological and sociocultural. The psychological aspect refers to the emotional and mental well-being, and satisfaction of the expatriate, and the sociocultural dimension refers to the ability to “fit in” and execute culturally appropriate behaviors (Searle and Ward, 1990). From their research, Searle and Ward (1990) were able to conclude that while

psychological and sociocultural adjustment may be interrelated, there is a need to regard these two facets as conceptually distinct. The distinction between the two facets allows us to differentiate between more cognitive and attitudinal processes from the behavior components of adjustment.

Upon arrival to the host country, expatriates are commonly faced with barriers to adjustment, such as the inability to speak the foreign language, coping with disorientation in the new environment, understanding the policies, customs, laws, and socializing with host country nationals (HCNs) (Black and Gregersen, 1999; Tung, 1981). One way to mitigate such obstacles of adjustment is to select on important traits and to provide appropriate training tools. Therefore, we highlight what influences the expatriate psychological and sociocultural adjustment process and propose the underlying mechanisms that can play a role in the trainee characteristics-adjustment relationship.

Methodology

A systematic review allowed us to identify, select, and critically appraise relevant expatriate variables in order to provide an integrative framework designed to facilitate expatriate adjustment.

Literature search

In order to identify meaningful articles, we searched PsychINFO using variations of the following terms: expatriate selection and expatriate training. For the selection criteria, we selected articles in which cross-cultural adjustment, expatriate performance, or learning was the dependent variable. Reference sections of these articles were then cross-referenced for additional support. Based on this review, we compiled the most supported expatriate learning and adjustment predictor variables found within these articles in a table format (see Table I). Two of the authors reviewed and coded every article independently to record variables, study methodology, and research results (see Table II for our coding taxonomy).

Subsequently, coders came together in a consensus meeting to extract similar and relevant variables. More specifically, as we drew from the training literature, the training variables that were found to be most predictive of learning and transfer of training were identified and integrated into our framework. Using the same identification process, the environmental variables that were most conducive to the adjustment process were chosen to be integrated into our framework. Our framework (see Figure 1) is the result of the aforementioned review of the expatriate literature regarding the most comprehensive selection, training, and environmental variables. The positioning of the variables in our model was determined by the review of the literature that showed how environmental variables were more closely related to expatriate adjustment, whereas the training design was more related to learning; thus, moderating the respective relationships. We will now turn to the best practices before elaborating on the rationale for the inclusion of each variable in our model.

Employee characteristics: best practices to increase expatriate success

Many researchers have hypothesized individual traits as potential predictors of expatriate success (e.g. Avril and Magnini, 2007; Graf, 2004). Consequently, we reviewed the literature to identify cultural intelligence (CQ), learning goal orientation (LGO), technical knowledge, skills, abilities, and other characteristics (KSAOs), and language skills as key variables in determining expatriate success, via learning and adjustment.

Construct	Definition	Supporting authors
Cultural intelligence (CQ)	An aspect of intelligence related to the ability to function in a novel culture	Ang <i>et al.</i> (2007), Earley and Ang (2003), Moon <i>et al.</i> (2012), Wu and Ang (2011)
Learning goal orientation (LGO)	An intrinsic interest in learning, motivated by the desire to gain knowledge for the sake of learning	Avril and Magnini (2007), Liu and Lee (2008), Moon <i>et al.</i> (2012), Porter and Tansky (1999)
Technical KSAO's	Knowledge, competencies, and skills which are required for a job, position, or task	Abbott <i>et al.</i> (2006), Avril and Magnini (2007), Eschbach <i>et al.</i> (2001), Hays (1974), Littrell and Salas (2005), Littrell <i>et al.</i> (2006), Lin <i>et al.</i> (2012), Tung (1981)
Foreign language skills	Ability to speak the host-country's national language	Abe and Wiseman (1983), Ashamalla and Crocitto (1997), Avril and Magnini (2007), Brein and David (1973), Forster (2000), Major (1965), Marschan-Piekkari <i>et al.</i> (1999), Mendenhall and Oddou (1985), Selmer (2006), Stening and Hammer (1992)
Training specificity	The extent to which the training program delivers content specific information to the host culture	Brislin and Yoshida (1994b), Goodman (1994), Gudykunst <i>et al.</i> (1996), Pires <i>et al.</i> (2006)
Training rigor	Rigor of the training program	Bennett (1986a, b), Bhavuk and Brislin (2000), Harrison and Hopkins (1967), Littrell <i>et al.</i> (2006), Stroh <i>et al.</i> (2005)
Training elements	IDPF (information, demonstration, practice, and feedback); basic elements of the training program	Celaya and Swift (2006), Salas <i>et al.</i> (2012), Taylor <i>et al.</i> (2005)
Organizational support	The extent to which an organization fosters employees' abilities and empowers them to achieve their goals	Littrell <i>et al.</i> (2006), Salas <i>et al.</i> (2012), Taylor <i>et al.</i> (2005) Avril and Magnini (2007), Black <i>et al.</i> (1991), Bozionelos (2009), Celaya and Swift (2006), Chang (2005), Cho <i>et al.</i> (2013), Dupis <i>et al.</i> (2008), Eschbach <i>et al.</i> (2001), Littrell and Salas (2005), Magnini (2009), Oddou (1991), Qin and Baruch (2010)
Family support	The degree to which the family and/or spouse of the expatriate adjusts to the new culture and in turn, provides support to the expatriate	Ali <i>et al.</i> (2003), Avril and Magnini (2007), Caligiuri <i>et al.</i> (1998), Chang (2005), Cole (2011), Eschbach <i>et al.</i> (2001), Gupta <i>et al.</i> (2013), Gupta <i>et al.</i> (2012), Liu and Lee (2008), Magnini (2009), Mendenhall and Stahl (2000), Punnett (1997), Selmer (1999), Shaffer <i>et al.</i> (2001), Takeuchi <i>et al.</i> (2002), Tung (1981, 1987)
Interpersonal support	Encompasses personal and interactive relationships	Bozionelos (2009), Brewster and Pickard (1994), Chang (2005), Copeland and Norell (2002), Eriksson <i>et al.</i> (2009), Hechanova <i>et al.</i> (2003), Magnini (2009), Stroppa and Spieß (2011)

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Table I.
Most predictive variables
of learning and expatriate
psychological/
sociocultural adjustment

Cross-cultural training

1. CCT
2. Pre-departure training
3. Post-departure training
4. Real-time training

Training design

1. Expatriate program design
2. Online chat rooms
3. CD-roms
4. Duration
5. Rigor
6. Evaluation
7. Degree of training
8. Feedback
9. Information
10. Demonstration
11. Practice

Environmental factors

1. Resources
2. Protégé experience
3. Support
4. Organizational socialization
5. Number of friends abroad
6. Organization-level attributes
7. Family-level attributes
8. Supporting practices
9. Host-country pull
10. Shocks
11. Assignment nature
12. Spousal learning orientation
13. Relations with HCNs
14. Other current expatriates
15. Family support
16. Bringing children on assignment
17. Similarity of host culture

Work attitudes

1. Job satisfaction
2. Organizational commitment

Stress

1. Work stress
2. General stress
3. Family stress

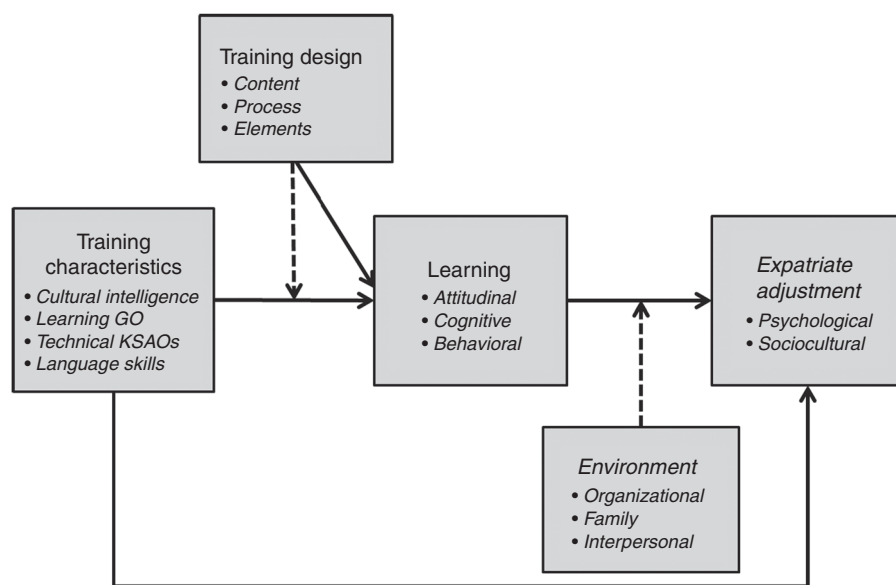
Employee characteristics

1. Cultural intelligence (CQ)
2. Learning goal orientation
3. Performance orientation
4. Emotional intelligence
5. Foreign language capability
6. Self-efficacy
7. Gender
8. Self-monitoring
9. Field experiences abroad
10. Intuition
11. Creative intelligence
12. Practical intelligence
13. Learning style
14. Thinking style
15. Core-self evaluation
16. Learning style
17. Thinking style
18. Openness to experience
19. Neuroticism
20. Extraversion
21. Agreeableness
22. Conscientiousness
23. Tolerance for ambiguity
24. Cultural flexibility
25. Expatriation willingness
26. Expatriation likelihood
27. Countries visited on holiday
28. Age
29. Foreign travel liking
30. Personal skills
31. Resiliency
32. Global citizenship
33. Self-oriented dimension
34. Others-oriented dimension
35. Perceptual dimension
36. Cultural sensitivity
37. Extra-cultural openness
38. Cognitive style
39. Management skills
40. Dietary/exercise habits
41. Technical skills
42. Job-level attributes
43. Professional education
44. Coaching
45. Mentoring
46. Skill development
47. Foreign living experience

Table II.
Coding taxonomy

CQ

Intelligence reflects a learner's capacity to acquire, retain, and interpret various types of information and experiences (Gardner, 1983; Sternberg, 1985). One type of intelligence is CQ, which focusses on intercultural settings, making it a practical construct in a world where globalization is on the rise (Earley and Ang, 2003). A vast



Note: Solid lines indicate best practices drawn from traditional literature, whereas dotted lines indicate novel links that call for empirical testing

Figure 1.
Integrative model
of expatriate selection
and training

amount of past research has found significant links between the dimensions of CQ and behavioral and psychological adjustment outcomes (Harrison *et al.*, 1996; Hechanova *et al.*, 2003). CQ denotes how an individual can be successful in novel cultural settings, allowing individuals to be good learners and strategic thinkers. For instance, a study by Ang *et al.* (2007) found metacognitive and cognitive CQ to be related to cultural judgment and decision making, whereas behavioral and cognitive CQ were related to task performance, and behavioral CQ was linked to adaptation. Similarly, Templer *et al.* (2006) found motivational CQ to be a significant predictor of overall adjustment. Taken together, research shows that different dimensions yield positive psychological and sociocultural outcomes:

Best Practice 1. Organizations should select employees who are high on all dimensions of CQ.

LGO

Two primary motivational orientations include LGO and performance goal orientation. Those with a LGO are motivated to learn for the sake of gaining knowledge or a new skill, which also enables them to learn from feedback (Wright and McMahan, 1992). Many authors suggest that a LGO is essential to succeed in the workplace because individuals high in LGO are more receptive to training and development and are more willing to learn from experience (Button *et al.*, 1996). Expatriates with a LGO have the ability to self-manage, and are thus able to resolve feelings of dissatisfaction that may be experienced when placed in an unfamiliar environment (Gammel, 1998). In support of this notion, Magnini and Honeycutt (2003) suggest that a LGO will facilitate the acquisition of new skills, in turn reducing the time needed for expatriates to feel

adjusted to the new culture and increasing job performance. These positive outcomes are likely to occur due to additional effort put toward learning these skills (Porter and Tansky, 1999), resulting in psychological adjustment:

Best Practice 2. Organizations should select employees who have high LGO.

Technical KSAOs

KSAOs are defined as the knowledge, skills, attributes, and other competencies necessary to do the tasks required by a given position in an organization (Christal and Weissmuller, 1988). According to Avril and Magnini (2007), the first and most crucial factor for success abroad is assigning the right person for a task, depending on what is needed for that specific job. However, according to training research, not all of these abilities can be trained (Bennet *et al.*, 2000; Forster, 2000). Therefore, job-specific KSAOs, such as autonomy or computer skills, should be identified during the selection process to improve technical performance on their assignment. Furthermore, if the employee has already acquired the technical KSAOs of the job, more time can be dedicated toward applying cross-cultural skills. More specifically, being a good performer and learning new skills can enable the expatriate to properly interact with locals, thereby increasing sociocultural adjustment. In turn, allowing for a more gradual adaptation into the new environment:

Best Practice 3. Organizations should select employees with technical KSAOs (i.e. job knowledge).

Language skills

An inability to speak the language of the host country is among the greatest challenges faced by the expatriate (Selmer, 2006) and is often an overlooked aspect in the context of foreign operations (Welch and Welch, 2008). Studies found that the ability to speak the host language is critical to cross-cultural adjustment (e.g. Abe and Wiseman, 1983; Stening and Hammer, 1992). Furthermore, an expatriate can combine and exchange knowledge from their interactions with HCNs, but this is not possible if there is no shared medium of communication (Welch and Welch, 2008). Subsequently, language differences are often the basis for informal inclusion and exclusion (Marschan-Piekkari *et al.*, 1999). Exclusion from everyday interactions with HCNs may have adverse consequences for expatriates, such as miscommunication and decreased interactions with HCNs. When the expatriate is unfamiliar with the host language, they are more likely to lack confidence when communicating with HCNs (Mendenhall and Oddou, 1985). Additionally, the expatriate's willingness and confidence in their interaction ability (i.e. level of HCN language fluency) has a direct influence on expatriate adjustment (Major, 1965), particularly sociocultural:

Best Practice 4. Organizations should select employees with a working knowledge of the host language.

Learning as an underlying mechanism

Upon arrival to the host country, expatriates may learn that their old habits and behaviors may be regarded as inappropriate or unacceptable in the host country. Cross-cultural adjustment thus requires the expatriate to learn behaviors that are better suited to the new environment. Learning can be defined as a "relatively

permanent change in knowledge or skill produced by experience” (Weiss, 1990, p. 172). Using a multidimensional approach, Kraiger *et al.*, (1993) examined learning taxonomies from education and cognitive sciences (e.g. Bloom, 1956; Gagné, 1984) to develop a classification scheme of three major learning outcomes: cognitive (e.g. verbal knowledge), skill-based (e.g. compilation), and affective (e.g. self-efficacy). When learning occurs, the material is likely to be transferred, in turn resulting in a greater potential for organizational outcomes. Learning illustrates what the trainee can do and should include the three aforementioned components: cognitive, skill-based, and affective (Ford *et al.*, 2010). Therefore, we highlighted the importance of all three dimensions of learning when considering whether or not cross-cultural training facilitates psychological and sociocultural adjustment.

While undergoing training, the expatriate must actively learn how to learn (Brislin and Bhawuk, 1999; Littrell and Salas, 2005). The benefits of this active learning can allow for greater adjustment. For example, Kelley and Meyers (1995) found that learning gains made during a weeklong cross-cultural training program reduced anxiety, which allowed for greater adjustment outcomes. Aiding a future expatriate in learning how to learn can help to ensure that they will be able to develop new approaches for obtaining information about their environment, so they can adjust properly (Bennett, 1986a, b; Littrell and Salas, 2005). The more confident an expatriate is in the knowledge they have obtained about how to respond to new stimuli properly, the greater their chance of adjustment.

The employee characteristics we highlighted for influencing expatriate adjustment (i.e. CQ, LGO, technical KSAOs, and language skills) are likely to do so through learning. Additionally, learning is described as reconstructing or transforming the expatriate’s worldview or interpretations (Tennant and Pogson, 1995). In turn, this ability to adopt new mental models and adjust worldviews is critical to the adjustment process (Segall *et al.*, 1999). Research conducted by Earley and Peterson (2004) suggest that individuals with high CQ are more apt to learning and executing demands placed on expatriates in regard to learning norms and behaviors. Similarly, individuals who have high levels of LGO are more willing to learn new logistics (Jarratt and Coates, 1995; Lado and Wilson, 1994). Considering the primary obstacle faced by expatriates to be socialization – the systematic means by which an organization assimilates new members into their culture (Berlew and Hall, 1966), high levels of LGO can better permit expatriates to internalize the host country norms. There are a number of socialization tactics that one can engage in, including feedback seeking, relationship building, and behavioral self-management (Griffin *et al.*, 2000).

Additionally, technical KSAOs have been the primary criterion for selection within the expatriate arena (Black and Gregersen, 1999). According to Tung (1981), technical skills are even more important overseas due to the distance from headquarters; the hub of technical expertise. Seeing as expatriates cannot readily consult with peers and superiors, those that lack technical KSAOs are more likely to spend time and energy to successfully complete their tasks. Therefore, it is reasonable to assume that expatriates can dedicate a more substantial amount of time learning cultural cues and logistics through these avenues when the expatriate already harbors the technical KSAOs. Furthermore, not surprisingly, language skills have been linked to an expatriate’s confidence to use the HCN’s language, as well as willingness and desire to interact with, understand, and learn from HCNs (Mendenhall and Oddou, 1985). More specifically, when an expatriate has a substantial foundation of the host language, they become more confident in their ability to utilize it. This, in turn, fosters a desire to

interact with HCNs (Major, 1965), and allows for more natural conversations to emerge (Abe and Wiseman, 1983). Accordingly, the more immersed an expatriate is, the more they can actively learn the logistics of the culture (see Middendorf and Kalish, 1996; Stuart and Rutherford, 1978, for illustrations of active learning benefits), which proved to be beneficial to the overall adjustment process. Therefore, we propose:

Proposition 1. Learning will mediate the relationship between trainee characteristics and expatriate adjustment.

Antecedents of expatriate adjustment: where should we go from here?

As aforementioned, expatriate selection has undergone more scrutiny than the expatriate training literature has. In order to fill in this gap, we incorporate concepts of more traditional and empirically based training models (e.g. Baldwin and Ford, 1988) into a cross-cultural training design. There is an overwhelming amount of literature showing the benefits of training (Littrell *et al.*, 2006; Moon *et al.*, 2012). Consequently, training can be incredibly useful in terms of the overall adjustment of the expatriate (Avril and Magnini, 2007; Liu and Lee, 2008). The training offered to expatriates should have two main goals:

- (1) to maximize learning; and
- (2) to apply the learned material outside the training context, yielding in adjustment of the expatriate.

Therefore, we integrate selection, training, and environmental variables which have garnered the most substantial empirical support, while utilizing Baldwin and Ford's (1988) model to construct our framework (see Figure 1) within the expatriate context.

Training design

In order to promote learning, training should come in different forms (Landis and Brislin, 1983). (Littrell *et al.* (2006) suggest that an assessment should take place prior to training so that the individual needs of the future expatriate can be factored into the training. Unfortunately, a meta-analysis showed that only 6 percent of studies reported any needs assessment prior to training implementation (Arthur *et al.*, 2003). Ultimately, the training should address the needs of the individual while also preparing the expatriate with the necessary skills to adjust to their host-country (Littrell *et al.*, 2006). The proposed training design in this paper has three pillars: training content, process, and elements. The next sections expand on the details of each pillar.

Training content. Research has recognized that selecting an approach (e.g. general vs specific) is a significant issue when determining cross-cultural training effectiveness (Gudykunst *et al.*, 1996). Specificity is achieved when expatriates are equipped with a skill set that is particular to the culture they will be immersed in (Pires *et al.*, 2006). Considering the substantial attentional resource demands imposed during learning (Kanfer and Ackerman, 1989), we can expect a training program that utilizes a more specific approach (i.e. specificity) will maximize the learning of skills needed in the host country.

In regard to the content of specific training, Goodman (1994) states that expatriates must learn about the historical and geographical background, along with societal and business tendencies of the country. Similarly, Brislin and Yoshida (1994a) suggested several areas of critical culture-specific knowledge, such as roles, moral, rituals, and

superstitions. Furthermore, Bennett (1986a, b) suggests addressing the “how” and “why” of the expatriate’s assignments to facilitate learning. First, when focussing on the “how” of the assignment, we must ask questions (e.g. How can the expatriate maximize learning?) that help in developing tools to enhance expatriate success. Second, when addressing the “why” of the assignment, we need to ask questions (e.g. Why do individuals behave a certain way in a meeting?) to increase expatriate’s understanding of the underlying mechanisms that shape behaviors, especially those elicited in new situations and environments (Bennett, 1986a, b). These types of questions are crucial in learning, as they enable expatriates to understand the norms, customs, beliefs, ideals and accepted behaviors they will encounter in the host-country. Consequently, choosing a more specific approach seems to be an important factor to facilitate learning in the expatriate. Hence, we propose:

Proposition 2a. The level of specificity of the training will be positively related to expatriate learning.

We expect the specificity of training to be even more important at certain levels of the highlighted employee characteristics. For example, individuals who have an intrinsic interest in learning are highly motivated to pay close attention and internalize information from training. Consequently, expatriates with a LGO are likely to benefit from specific training goals. Similarly, individuals with CQ have the ability to understand what constitutes a culturally appropriate behavior (Berry and Ward, 2006; Sternberg and Grigorenko, 2006). Therefore, a training program that is specific will tap into the innate ability to interact in a new environment by maximizing the recognition and execution of cultural cues. Additionally, the motivational aspect of CQ increases the motivation to apply this new cultural knowledge (Earley, 2002).

Specificity can maximize learning outcomes if the expatriate has attained some or all of the technical KSAOs of their future job by allowing more opportunities to allocate cognitive resources to instilling the specifics of the assignment. Similarly, if the expatriate has acquired language skills relevant to the host country prior to training, they will have a greater absorptive capacity (Awang *et al.*, 2013). Therefore, an expatriate with a working knowledge of the host language will learn specific language skills more effectively during training. Based on these arguments, we propose:

Proposition 2b. The degree to which the training program is specific (vs. general) will moderate the relationship between employee characteristics and learning, such that as specificity increases, the relationship between employee characteristics and learning will be stronger.

Training process. The training process has been broadly categorized as either intellectual or experiential (Bennett, 1986a, b). The latter model of training necessitates a higher rigor and active involvement from the future expatriate, therefore maximizing the learning of cross-cultural behaviors (Bhawuk and Brislin, 2000; Fowler and Blohm, 2007). In particular, Stroh *et al.* (2005) suggest that training programs of higher rigor result in learning rates that exceed those of less rigorous training by more than 70 percent.

Previous research has attempted to understand training processes in a more fine-grained manner (e.g. Tung, 1981). Littrell *et al.*’s (2006) framework identified training approaches (ascending in level of rigorousness) as: attribution, culture awareness, interaction, language, didactic, and experiential. These rigorous,

experiential training programs can offer this level of training through simulations, role playing, field trips, and intercultural workshops and are strongly linked to learning (Littrell *et al.*, 2006). Considering Littrell *et al.*'s (2006) six approaches, it becomes easier to quantify the cross-cultural effects in a meaningful way and to compare their effectiveness with each other. Based on the evidence above, we propose the following:

Proposition 3a. The level of rigor of the training process will be positively related to expatriate learning.

It is important to consider the interaction of training rigor with employees' characteristics. Those with high levels of LGO not only seek to enhance their learning and development competence (Button *et al.*, 1996), but they also enjoy the challenges associated with learning (VandeWalle and Cummings, 1997). Additionally, because such individuals are more motivated to learn from their encounters and experiences (Brett and VandeWalle, 1999), they are more likely to learn and exhibit adaptive outcomes (Porter and Tansky, 1996). When training process draws from more rigorous methods, such as experiential training, intrinsically motivated individuals will gain and participate more. Therefore, it can be expected that the rigor of the training process is likely to increase positive outcomes when the appropriate employee characteristics exist.

Individuals high on CQ have the propensity to be more strategic while learning and are well suited for more rigorous tasks that should be assigned during training (Lee and Sukoco, 2010). High CQ individuals are ideal for such tasks as they can easily adjust their thinking, behavior, and motivation (Lee and Sukoco, 2010) making them more likely to produce successful learning outcomes during training. Similar to individuals high on CQ, expatriates encompassing the KSAOs of the job are also autonomous, technically competent, and adaptable (Avril and Magnini, 2007). A training program that is rigorous and incorporates rich, interactive training methods will maximize performance by further building upon the technical competencies which the expatriate already harnesses. Similarly, individuals exhibiting foreign language skills have the propensity to learn the new language in more depth (Awang *et al.*, 2013). Therefore, if additional language skills are incorporated into the training in such a way that it is interactive and engaging, these expatriates will have an advantage. Based on the evidence above, we propose the following:

Proposition 3b. The degree to which the training program is rigorous (high vs. low rigor) will moderate the relationship between employee characteristics and learning, such that as more rigorous approaches are used, the relationship between employee characteristics and learning will be stronger.

Training elements. Information, demonstration, practice, and feedback (IDPF) are the basic four elements of any training program (Salas *et al.*, 2012), and we can extrapolate this logic to expatriate training as well. The first element, information, provides trainees with essential knowledge. This type of didactic training will promote understanding of the host culture and allow the expatriate to develop a framework to evaluate new situations (Littrell and Salas, 2005). Providing information that is culture-specific via meetings with international staff, on-the-job training, lectures, reading assignments, and audio/visual presentations – is positively related to cultural understanding (Celaya and Swift, 2006).

The second element, demonstration, should aim to model correct behaviors and cognitive processes relevant to the host-country culture (Kraut, 1976; Taylor *et al.*, 2005). Demonstration training techniques aid in learning as they require the use of experiential learning, which is not only more rigorous but helps the expatriate to acquire the cognitive skills needed to make correct attributions (Littrell and Salas, 2005). When an expatriate successfully creates their own attributions, they have acquired an internal cognitive structure that allows them to interpret events and respond in the host-culture correctly (Morris and Robie, 2001; Littrell *et al.*, 2006), which can aid in learning.

Practice (i.e. “behavioral rehearsal” or “skill practice”), the third element, is important for the transfer of learned content and can go hand-in-hand with the previous element of demonstration (Taylor *et al.*, 2005). Once a behavior or thought is modeled, the expatriate should practice the skills to ensure that the information is easily recognized and instilled (Crocker, 2002). According to the power law of practice, repeated execution of a new skill facilitates greater learning (Newell and Rosenbloom, 1981). International trainers consider the practice of cultural skills to be a primary method of preparation (Grahn and Swenson, 2000). Fortunately, with the increasingly widespread use of technology, the customization of training is advancing (Adams, 2002) and trainees can have the opportunity to practice learned skills at their own pace for a reduced cost.

Moreover, practice is most influential when combined constructive and task-focussed feedback (Cannon and Witherspoon, 2005; Kluger and DeNisi, 1996). Feedback serves to identify areas of improvement during training in a timely manner. Trainers should systematically present feedback to trainees by evaluating performance results, learning measures, reaction measures, and including a behavioral assessment (Luthans and Farner, 2002). Accordingly, feedback is important because it ensures the expatriate is learning and understanding their new position overseas along with the host-country novelties, which in turn, has a positive impact on the expatriate’s cognitive and behavioral adjustment outcomes (Caligiuri *et al.*, 2001; Kupka *et al.*, 2008). Thus, we suggest the following:

Proposition 4a. The implementation of training elements (i.e. IDPF) will be positively related to expatriate learning.

While IDPF have been highlighted as crucial training elements (Salas *et al.*, 2012), trainees do not react to a given program in the same manner. For example, there are certain individual differences when it comes to the interpretation of feedback, such that expatriates with a LGO will be more willing to learn from and utilize feedback. When placed in an ambiguous situation, those with high LGO stay on task while trying a new approach based on even minimal amounts of feedback received (Porter and Tansky, 1996). Employees who believe they have the potential to learn and, in turn, improve their skill set, will be more receptive to feedback and utilize this information to help them prepare for the next encounter (Porter and Tansky, 1999).

Similarly, individuals high on CQ are more apt to learn and execute the demands placed on expatriates in regard to learning norms and behaviors (Earley and Peterson, 2004), thus it can be expected that these individuals will utilize the information they receive from feedback to better learn and interpret their training. The same can be said of individuals who have already acquired the KSAOs of the job; these individuals are high on autonomy and are therefore more likely to benefit from feedback to be able to

function and learn on their own (Avril and Magnini, 2007). More specifically, this is an opportunity to learn intercultural communication, cognitive skills, and relocation skills (Selmer, 2001). Since feedback helps an individual modify their actions and skills, it can be expected that an expatriate with at least a working knowledge of the host language will benefit greatly from feedback received regarding fluency. Along this line, the expatriate should utilize this feedback in order to understand what aspects of the language they should be practicing in order to increase mastery of the language. Taken together, we suggest the following:

Proposition 4b. The degree to which the training draws from key elements (i.e. IDPF) will moderate the relationship between employee characteristics and learning, such that as more training elements are used, the relationship between employee characteristics and learning will be stronger.

Environment

Having support from multiple sources throughout the expatriate's assignment is an invaluable tool for learning and adjustment (e.g. Avril and Magnini, 2007; Littrell and Salas, 2005). We suggest that the environment should contain three pillars of support: organizational, family, and interpersonal. These elements are critical before, during, and after departure to reassure current and future expatriates that their international transition will not provoke stress or loneliness (Cho *et al.*, 2013; Eschbach *et al.*, 2001). Given the intimate link between affect and motivation (e.g. Wigfield and Eccles, 2000; Willms, 2003), it is likely that an expatriate who is disaffected will lack the motivation to extend learned skills or abilities (Ainley, 2006). Thus, while learning is a strong predictor of transfer, it is not sufficient to guarantee that learning will translate into on-the-job behavior (Campion and Campion, 1987). Therefore, environmental support should moderate this relationship, such that its presence can facilitate the conversion of learned cross-cultural skills to adaptive cognitive processes and behaviors, resulting in higher levels of psychological and sociocultural adjustment.

Organizational support. It is the responsibility of the parent company to create a supportive organizational climate (Baldwin and Ford, 1988). The parent company should show support through constant open communication (Oddou, 1991), financial incentives, performance indicators (Avril and Magnini, 2007), and by providing a foundation that promotes a positive learning environment (Min *et al.*, 2013). Information on role clarity (Guzzo *et al.*, 1994), non-acceptable behaviors (Okpara and Kabongo, 2011), and explicit company practices (Guzzo *et al.*, 1994) are all factors that should be part of the company's offered support because they foster motivation, increasing the likelihood that expatriates will put forth the effort in applying learned skills or behaviors.

It is not uncommon for an expatriate to have feelings of loneliness, anxiety, and confusion when transitioning to a new culture. These are all legitimate reasons that highlight the importance for an expatriate to feel that they have the full support of their home company and ability to reach out to them (Avril and Magnini, 2007; Chang, 2005). Acting as a stress-buffering mechanism, organizational support provides a positive learning environment (Bender and Fish, 2000) and motivates the individual to allocate more effort toward accomplishing job-related tasks (Bacharach *et al.*, 2008). Thus, it can be that an expatriate working in a supportive context will put forth greater effort

in applying trained skills, thereby increasing their adjustment. With the evidence presented above, we suggest the following:

Proposition 5. The degree to which the organization provides support will moderate the relationship between learning and adjustment, such that as organizational support increases, the relationship between learning and adjustment will be enhanced.

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Family support. Many authors have argued that family and spousal support is just as imperative as organizational support (e.g. Cole, 2011; Gupta *et al.*, 2013; Liu and Lee, 2008). This idea has come to the forefront of expatriate research because the adaptation and support of the family has an obvious effect on the psychological adjustment of the expatriate (Gupta *et al.*, 2013). This is because expatriates and their families become dependent on each other for encouragement due to isolation and loss of pre-existing support systems (Takeuchi *et al.*, 2002). It is believed that the family, particularly the spouse, can provide the expatriate with first, a continual source of affect; second, information and support during stressful periods; and third, affirmations to the expatriate in their ability to succeed (Kraimer *et al.*, 2001). Thus, families may provide the support the expatriate needs to cope with difficulties abroad, thereby increasing psychological well-being (Lu and Cooper, 1995). This in turn will likely motivate the expatriate to invest efforts into navigating the new environment.

In order to provide support for the expatriate, the family itself needs to be provided with their own sources of support. In particular, offering families alternative resources such as support groups, personal peer networks (Avril and Magnini, 2007; Gupta *et al.*, 2012), and social relationships (Magnini, 2009) are all beneficial because they aid in family adjustment (Cole, 2011; Takeuchi *et al.*, 2002). It is also advantageous to offer training to the expatriate's family as it can ultimately aid in the overall adjustment of the expatriate (Avril and Magnini, 2007; Gupta *et al.*, 2013). Fundamentally, the training should aim to ensure that the expatriate's family has a realistic view of what their new life will be like and that they are learning the correct behaviors and cognitions that they should employ while overseas to ensure psychological adjustment (Vögel *et al.*, 2008). Based on these arguments, we propose the following:

Proposition 6. The degree to which the family provides support will moderate the relationship between learning and adjustment, such that as family support increases, the relationship between learning and adjustment will be enhanced.

Interpersonal support. Interpersonal support (i.e. social support) encompasses personal and interactive relationships with people to help with the adjustment of the expatriate (Bozionelos, 2009; Magnini, 2009). Interpersonal support is especially important to international workers because the sudden change of environment brings about a disturbance of previously established social networks (Copeland and Norell, 2002) and having interpersonal support can reduce the uncertainty in these times (Kraimer *et al.*, 2001). Interpersonal support can allow expatriates to have a "safe haven" for expression and also reduce the impact of negative experiences that could occur on assignment (Bozionelos, 2009).

Brewster and Pickard (1994) found that expatriates who received support within a local expatriate community post-arrival not only had more positive attitudes toward

the pre-departure training, but achieved higher levels of adjustment as well. Having assigned mentors – via the expatriate’s job or organization – is another way to achieve interpersonal support, and it can offer many benefits to expatriates socially and career-wise, including increased ability to achieve goals, organizational visibility, organizational knowledge, and career advancement (Forret *et al.*, 1997; Veale and Wachtel, 1996). Each of these has the ability to not only help the expatriate at work by converting their learned skills into better performance, but it can also help to increase their alleviate stress in their day-to-day lives. Interpersonal support has been found to prevent burnout by reducing the amount of emotional exhaustion that a foreign assignment creates (Eriksson *et al.*, 2009). Within the stress-management literature, social support has been found to alleviate stress and facilitate coping in novel situations (eg. Ashford and Taylor, 1990; Pinder and Schroeder, 1987). Thus, an expatriate with social support has greater psychological well-being, and therefore may be more inclined to apply learned skills to the adjustment process. With the evidence presented above, we suggest the following:

Proposition 7. The degree to which interpersonal support is received will moderate the relationship between learning and adjustment such that as interpersonal support increases, the relationship between learning and adjustment will be enhanced.

Discussion

Considering the lack of empirical testing for comprehensive models of expatriate adjustment (for an exception see Tharenou and Caulfield, 2010), this paper seeks to shape future research while also condensing best practices. More specifically, our integrated model shifts the focus from selection variables to a more holistic view of expatriate adjustment. First, best practices are illustrated. Secondly, we identify the mediating variable (i.e. underlying mechanism) of learning. Third, our framework highlights the importance of training as an interaction variable. Lastly, we demonstrate the role of environmental variables as moderators of the learning and adjustment relationship.

The best practices highlight the most relevant traits, but it is important to point out that future research should continue to investigate key predictors of expatriate psychological and sociocultural adjustment. For example, there are variables, such as previous experience abroad, that continue to show mixed findings. While some have found this variable to be a significant predictor of adjustment outcomes (e.g. Carpenter *et al.*, 2000; Takeuchi *et al.*, 2005), others are far less enthusiastic regarding its predictability (e.g. Black *et al.*, 1991; Van Vianen *et al.*, 2004).

Furthermore, every area of an expatriate’s life (e.g. organization, family, and interpersonal) contributes to adjustment in a new environment due to its interplay with the expatriate’s identity. By ensuring that learning is being achieved, adjustment will likely be attained by the expatriate when they receive the proper multifocal support. Consequently, our framework advances the expatriate literature by going beyond main effects, and expanding on the relationship between selection, training, environmental variables, and relevant outcomes.

Research implications

If the propositions are supported, a better understanding of training components (i.e. content, process, and elements) should be designed and paired with certain types of employees’ characteristics. Furthermore, environmental support (i.e. organizational, family, and interpersonal) can aid with the conversion of learned material to

psychological and sociocultural adjustment. However, important research nuances can be further broken down by future research, such as the investigation of the model at a more specific level. For example, knowing how the profile of each employee characteristic would work together and/or affect one another (e.g. can high LGO account for not so high CQ?). Additionally, knowing that certain antecedents of expatriate adjustment are only related to specific dimensions would be beneficial because we could then see whether similar findings occur when taking training components into consideration. Although research has examined factors related to the facets of the conceptualization of adjustment set forth by Black *et al.* (1991), antecedents of the Searle and Ward (1990) conceptualization of psychological and sociocultural adjustment are still unknown. For example, one can test whether training for attribution increases cognitive learning, which may tap the psychological dimension more than the sociocultural dimension of adjustment. Along these lines, further research may examine how the psychological and sociocultural dimensions of adjustment work together. For example, psychological adjustment may be a pre-cursor to sociocultural adjustment. It may be that expatriates must internalize learned skills and cope with stressors before they can successfully apply them in the new environment.

Additionally, there are other variables that could be explored, such as time. Along with pre-departure information training, post-departure, or “real-time” training can be extremely beneficial to learning and adjustment (Magnini, 2009; Mendenhall and Stahl, 2000). Currently, technology is enabling an expatriate to receive immediate responses from people all over the globe through online forums (Lea *et al.*, 2006). Expatriates have the ability to ask questions and receive answers from multiple people, often with experience abroad. Each post can contribute something unique, therefore increasing learning about the host culture through the creation of new thoughts and ideas (Magnini, 2009). Additionally, the repatriation process tends to be overlooked, even though similar variables may influence how families readjust to their home country (Cho *et al.*, 2013; Lazarova and Cerdin, 2007; Littrell and Salas, 2005). Much of the literature on expatriate adjustment considers the role of the family and spouse on the expatriate’s adjustment to be an important part of assignment success. Researchers should investigate the specific elements that affect a family’s decision to relocate and allows them to properly adjust. Lastly, another fruitful avenue for future research may involve the consideration of retention. While our model seeks to demonstrate the significance of learning, it may be of considerable value to consider the role that retention of learned information plays in the adjustment process, as well as variables that influence retention levels. Thus, testing our model – at broad and specific levels – as well as investigating time and other variables will likely warrant a better understanding of the nuances surrounding expatriate adjustment.

Practical implications

Once our model is empirically tested, it can serve to highlight ways to select and train employees as well as the importance of learning and adjustment in order to produce globally competent expatriates. Until these organizations implement an effective system of obtaining and developing such employees, they will likely have trouble competing in the global market. Therefore, a better understanding of what contributes to both aspects (i.e. psychological and sociocultural) of an expatriate’s adjustment could have the potential to save companies numerous assets.

In selection, focussing on novel variables that maximize learning and adaptation are brought to the forefront. Besides technical skills, we focus on often overlooked KSAOs

such as CQ, LGO and language skills. By focussing on those variables, organizations can select employees with the proper baseline necessary to acquire the necessary knowledge and, more importantly, transfer it to the workplace abroad. In training, organizations can now employ the appropriate process depending on the learning outcome that they desire (e.g. affective, cognitive, or behavioral). The categorization of expatriate training according to its content, process, and elements can help in establishing the effective and ineffective details of an intervention. However, the cost of training is often times an influential factor when deciding whether or not to provide cross-cultural training programs. When considering the shortcomings of an expensive training program due to its rigor, it is important to consider all the variables that can influence the bottom line of the company. An utility analysis, for instance, is based on cost of the training intervention, amount of money used to implement the new training, number of people receiving the training, and differential job performance (Cascio, 1989). The latter is then extremely important within the expatriate training context. Considering that one failed expatriate has the potential to cost a company upwards of a million dollars (Mervosh and McClenahan, 1997), the investment in more stable selection processes and effective training programs that consider learning in addition to both psychological and sociocultural adjustment can improve organizational outcomes.

In adjustment, our framework suggests specifying the psychological and psychosocial criteria. In doing so, organizations can differentiate effects in a more fine-grained manner if the links are found to be significant. This can help target the appropriate KSAOs instead of spending resources on broader variables that may have little predictive power. Accordingly, companies will likely view expatriation processes more favorably, while expatriates will be more satisfied with their experience overseas and have success in their work environment and in their daily lives. It is our hope that this model will allow organizations to recognize that investing in both the learning and adjustment predictors would be extremely advantageous to the overall success of the expatriate and the company.

Conclusion

This paper makes several contributions. First, it integrates past research by identifying which of the antecedents and training mechanisms are most important for expatriate learning, and adjustment. Little effort has been made toward integrating traditional and expatriate training literatures (Mesmer-Magnus and Viswesvaran, 2007), which we help to address with this paper by extensively drawing from both. Secondly, it considers specific employee, training, and environmental characteristics that will bring about the best outcomes of learning, and adjustment. As aforementioned, the selection traits that have been found to be most predictive of adjustment are CQ, LGO, technical KSAOs and language skills. Past research has provided ample evidence for these variables, allowing us to guide best practices for expatriate selection. On the other hand, training and contextual variables are often taken into consideration as isolates, or ignored altogether. Hence, this paper makes the contribution of guiding both selection and training practices, while addressing how the two may interact with contextual variables.

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