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MANAGING EXPATRIATES: THE ROLE OF MENTORS

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ABSTRACT

Sending key managers on foreign assignments is common practice for multinational and international firms. Although firms spend considerable resources to support expatriates, the return they receive remains disappointing. Current research suggests that expatriates are very likely to cut short their visit, and/or return to dissatisfying careers. Effective mentoring promises to remedy some of these problems, yet few firms seem to implement the mentor concept in practice. Based on depth-interviews of expatriates, we delineate the mentor's role both in the home and host office. We also develop a checklist of activities for home-office mentors.

INTRODUCTION

With burgeoning international business, and rapid displacement of production facilities and back-office operations to low-wage countries, sending qualified managers to work in foreign locations has become increasingly important. Multinational corporations are known to spend up to \$2 million per expatriate on salary and expenses during a four year stay in a foreign location (O'Conner, 2002; Klaff, 2002). The problem is, despite this financial outlay, close to 40 percent of expatriates cut short their visit when assigned to a developed country, a number that escalates to 70 percent when the host country is underdeveloped (Andreason, 2003). Moreover, returning expatriates are often dissatisfied; between 20-50 percent are known to leave the firm within a year of return (see Black and Gregersen, 1998). Hence, while firms incur considerable expense to ensure expatriate success, they are largely failing to address the causes of expatriate failure.

High levels of stress associated with expatriation and ineffective repatriation are often-cited reasons for expatriate failure. For instance, before leaving, expatriates are reportedly stressed by the lack of clarity about new responsibilities and by the prospects of cross-cultural adjustment (see Andreason, 2003; Black, Mendenhall and Oddou, 1991). While overseas, expatriates experience culture shock (Bolino and Feldman, 2000) and disconnection from social and political networks (Suutari and Brewster, 2001). Scholars suggest that greater cultural novelty, i.e., greater the difference between home and host cultures, the higher levels of stress felt by expatriates (Andreason, 2003). Upon return, the prospects of fitting in and finding careers that utilize their newly learned skills and perspectives is also known to cause stress (see Suutari and Brewster, 2001; Vermond, 2001).

As a remedy, scholars have pointed to mentors as stress-reducers and managers of expatriate experiences (e.g., Feldman and Thomas, 1992; Harvey and Wiese, 1998; Webb, 1996). Mentoring is defined as an “intense developmental relationship of relatively long duration in which protégés receive a range of career and psychosocial help exclusively from one senior manager (Whitely, Dougherty, and Dreher, 1991, p. 333).” Mentors are known to use a combination of sponsoring, coaching, counseling and advocacy; and: (a) help expatriates adjust to foreign cultures (Harvey and Wiese, 1998), (b) act as liaisons, and provide a sympathetic ear (Feldman and Thomas, 1992), (c) represent the expatriate’s interest in the home office while s/he is away (Vermond, 2001; Webb, 1996), (d) help reduce uncertainty and career-related stress (Vermond, 2001; Swaak, 1997), and (e) help returning expatriates adjust to the home office (see Downes, Thomas and Singley, 2002; Vermond, 2001; Swaak, 1997). While the bulk of the literature addresses issues related to mentors located in the home office, scholars have called for multiple mentors (home office, host office related, and host country social mentors) to aid expatriates (Harvey and Wiese, 1998).

Our recent study of 27 expatriates suggests that organizations have largely failed to define mentors as a key managerial function, and failed to utilize the concept to its potential. For new research to speak to the practical realities of organizations concerned with improving expatriate management, it seems important to clearly delineate the tasks and responsibilities of mentors – something that the current literature has yet to do. Our purpose here is to discuss the learning derived from expatriate voices, and develop a checklist of mentor tasks and responsibilities. In so doing, we aim to take a step toward the eventual definition of effective mentoring in the expatriate context as a formal human resource and organizational function – an idea whose time seems to have arrived.

METHOD

The scarcity of empirical findings on effective mentoring of expatriates precludes literature-derived hypothesis testing, and calls for exploratory research to stimulate new thinking. In view of this, the study was based on depth-interviews of 27 expatriates selected via a convenient sample during which they were asked to relate their experiences and learning relevant to their foreign assignment and upon return. The interviews were conducted by student teams (three sections of an organizational behavior course and one section of an advanced human resource management course) as part of their class research project. One author worked closely with each of the teams to conduct literature reviews, develop interview questions, identify expatriates for depth-interviews, and guide the study. The author also coached students for interviewing skills (e.g., developing the interview protocol, use of probing questions, grounding the data by asking for examples, active listening, etc.). The interviews lasting between 30-45 minutes were tape recorded and transcribed.

The sample consisted of twenty-four male and three female expatriates. Twenty expatriates represented *Fortune 500* listed multinational firms, and seven expatriates represented international firms with sales less than \$500 million. The average length of foreign service was three years. They had served in multiple areas including consulting, law, construction, finance, design engineering, manufacturing, and sales and marketing. Twenty-six expatriates were U.S. citizens assigned by U.S. based companies to work in foreign locations (n=14, including Australia, Belgium, Bermuda, Brazil, Canada, China, Germany, France, Hong Kong, Japan,

Mexico, Switzerland, Thailand, and the U.K.). One manager was a British citizen who had recently completed an expatriate assignment in the U. S. (for a U.K. based firm).

After student-teams reported their findings, all interview transcripts were separately content analyzed by authors. This article emerges from the learning we derive after coding each transcript independently, and identifying the major themes from expatriate voices. The drawbacks of a study that uses a convenience sample of expatriates and exploratory depth interviews are that findings cannot be widely generalized. Therefore, the objective of this paper, consistent with our exploratory intent and reflective of this understudied area of scholarly inquiry, is to focus on deriving internally consistent findings to stimulate thinking, and aid future inquiry and theory development efforts.

• THE WHAT AND WHO OF MENTORS

The incidence of mentoring in general is uniformly low in the data. Only six of the twenty seven (22%) expatriates were assigned formal mentors – four located in the home office, and two in the host country. An additional eleven expatriates took initiative and sought informal mentors (five in the home office, mostly immediate supervisors; six in the host country). Whether they had a mentor or not, all expatriates spoke of mentors as highly beneficial. A sample expatriate explains:

You've got to have a mentor when you're overseas, you have to know that there's someone looking out for you at all times. [Mentor should be] someone in a relatively senior position so that if the career activity of all time comes up at home, that person's there. You can't look for it when you are in Timbuctoo, but he or she can look for it there and react to it. You need a very strong mentor with whom you meet at least quarterly either overseas or more likely back at home to keep you up to date on what's happening, who's doing what, rather than depending on the rumor mill.

Table 1 shows the functions collectively performed by mentors, as reported by our sample of expatriates. In general: (a) although less than a quarter of expatriates were assigned a formal mentor, the mentor-concept is viewed favorably by all, and (b) mentors perform a host of functions, but not all mentors perform all functions – suggesting the lack of a uniform understanding about mentor roles and responsibilities. Overall expatriates are glad to have mentors, but wish they did more.

Presently, organizations seem to underestimate the need for a mentor in general, and the need for a mentor in the host country in particular. Expatriates suggest that firms should appoint a host country mentor who is either a home-country native with experience working in the host country, or a host-country native with experience working in the home office. Some expatriates sought informal mentors for advice on workplace norms, politics, and formal and informal networks among co-workers in the host-country. One executive, explaining why he wished for a mentor with experience in the home and host cultures to advise him on workplace politics overseas, notes:

First of all the formality of the U. K. is something that is unbelievably different from here. Here, in our company, and I think in most good companies, you can have a good working relationship throughout the organization. I'd go to those distributors (in the U. K.) and I'd expect to talk to people in customer service, get to know them, make sure they know my products, show my face, see the people in shipping, repairs, and accounting. [Because] you'd want them to know who you are. [But] my relationship was only supposed to be, from the British perspective, only to the vice-presidents of their company. They sure didn't like me talking to people down here (gesturing low down) in the organization. I made a jackass of myself a few times, got screamed at a few times, for talking to the production supervisor or shipping coordinator.

TABLE 1

Types of mentors and support provided (n=27)

Actions to reduce Stress	Formal Home Office Mentor	Formal Host Country Mentor	Informal Home Office Mentor	Informal Host Country Mentor	Expatriates Who Wished for Mentor Support
Setting Expectations:					
<i>a. Job Overseas</i>		1	3	2	5
<i>b. Foreign Culture</i>			3	1	11
<i>c. Impact on Career</i>					5
Cross-Cultural Adaptation		1		4	9
Communication with Home Office:					
<i>a. Getting Questions Answered</i>	4		3		3
<i>b. Providing Information and Networking</i>	1		5		4
Repatriation:					
<i>a. Physical Re-location</i>	1				5
<i>b. Reconnecting with Networks</i>	1		1		5
<i>c. Job Placement back in Home Office</i>	1				9

While scholars have advocated for greater support for expatriates when the culture is more versus less novel (see Andreason, 2003), this quote suggests that even when cultures are similar (U.S. and U.K.), mentoring is viewed as necessary and beneficial. In the study, only five of thirteen expatriates sent to Western Europe mentioned they experienced low-stress; and six of the thirteen (five assigned to the U.K.) wished they had mentors to help with cross-cultural adjustment. Moreover, while the literature indicates that host nation mentors are primarily useful for helping expatriates adjust to the foreign culture, sampled managers' ideal mentor had worked in both countries and helped them manage cross-cultural communication.

An expatriate explains:

Well [the informal mentor] did spend a lot of time in the beginning towards [explaining to me] the state of the business, strengths and weaknesses of our people, where we do business. He was [a host national], classically trained, unbelievably bright, spoke six languages. Someone I could and did learn a lot from. Had he come to the [home country] and been an expatriate here and gone back, he would have been a much better mentor there on the culture side. He'd know what it would have been like. Had he been an expatriate he would have been a better mentor.

In general, we infer that the mentor role is poorly defined and implemented – as evident from the few mentors assigned, the lack of uniformity in what they did when assigned, and the high levels of dissatisfaction reported with mentoring (and repatriation in particular). In two cases, expatriates left their firms within a year of their return mostly due to dissatisfaction over the job placement. Both experienced uncertainty about the job upon repatriation, received no choice in their job placement and felt their newly acquired knowledge and skills were not utilized at all by the home office. One of these expatriates, indicating his disappointment with the job, notes:

When I came back, it was a very disruptive and disappointing kind of development to find myself very confined in a narrowly defined job as opposed to overseas. [I did not have a say] It was "take it, or leave it." Clearly, after a year [back home], most of my expectations were unfulfilled. I viewed myself as kind of a seasoned veteran and to find myself pigeon-holed in a very narrowly defined, highly structured job which was a staff job – and I had always been a line person. I was unfulfilled.

Expatriate voices collectively point, however, to the role effective mentors can play. Based on their suggestions, the following discussion delineates the mentor-role during the pre-departure stage, during the foreign assignment, and upon repatriation. In particular, the data sheds light on the detailed activities of effective home-office mentors.

MENTOR ROLE

For the novice expatriate, the pre-departure stage is characterized by uncertainty about the new job and performance expectations overseas, as well as the foreign environment and culture (see Black et al. 1991; Bolino and Feldman, 2000; Swaak, 1997). In general, expatriates suggest that mentors can help address concerns that arise during the pre-departure stage including: (a) setting job definition and performance expectations, (b) sponsoring language and cross-cultural training, (c) managing careers upon return.

The key issues that emerge when expatriates are in the overseas location are cross-cultural adaptation and communication with the home office – issues that have received the most attention from scholars (see Harvey and Wiese, 1998; Klaff, 2002; Suutari and Brewster, 2001; Vermond, 2001). Sample expatriates concur and indicate the demoralizing impact of feeling isolated from the home-office and fearing its adverse impact on their careers.

As the overseas assignment comes to a close, the expatriate's key concerns include finding a suitable job in the home office and fitting back in without losing status and in ways that fully utilize the knowledge and skills gained overseas – a notion that has invited the attention of scholars (see Suutari and Brewster, 2001; Vermond, 2001). Expatriates describe their key concerns regarding: (a) the transition back to the home office in terms of getting used to the company structure as well as re-connecting with networks (co-workers and boss), and (b) the actual job placement in terms of prior knowledge and certainty as well as utilization of skills. One sample expatriate, indicating his biggest source of stress during repatriation, notes:

I think the biggest anxiety was – when you are out in the field, an international in a subsidiary, they tend to be lean and mean. And there is very little distance between you and your boss in the international subsidiary. It is much more collegial. It is less formal and structured. And my anxiety was coming back to the world headquarters in Boston, a much more stratified, structured, less collegial [work] environment.

MENTORING: DOING IT RIGHT

Organizations have clearly committed to spending resources to help expatriates (physical transfer, living expenses, language and cultural training). We know this because all expatriates describe the additional expenses involved in their sojourn, and none raise concern about their inadequacy. What is lacking is psycho-social support expatriates require for overcoming their anxieties and uncertainties, particularly after they return. In a related vein, it is clear that mentoring is yet to be defined as a key organizational activity, or viewed as an intrinsic component of international management strategies. Moreover, while the role of a mentor has the potential to serve as a one-stop-shop for managing expatriates, there are clear weaknesses in the way the concept of mentor is implemented in practice. In particular, each mentor seems to perform only a narrow segment of activities attributed to effective mentoring. We draw three implications from expatriate voices about: (a) who should mentor, (b) what should mentors do, and (c) how mentors should be evaluated. At the outset, two points deserve emphasis. First, our checklist is aimed at home office mentors, and (b) the exploratory nature of our study and

convenience sample preclude generalization of our findings. Additional research is needed before widely applicable findings emerge.

In terms of *who* should mentors, expatriate voices highlight two criteria. First, the home office mentor should be a senior manager with the necessary authority and political clout to mobilize the resources needed for successful experiences in foreign locations, and successful assimilation in the home office upon return. Simply put, expatriates want to know how their learning and experiences gained from the foreign assignment will be factored into their new careers upon return, and look for signs that the firm appreciates and values their tour of duty. Returning expatriates are disproportionately dissatisfied when their careers are treated as an afterthought, and/or when they are assigned back to their original positions without much in the way of recognition. Without political clout, home office mentors are unable to help expatriates much with assimilation upon their return, i.e., help with principal cause of stress of the returning expatriate, and the chief cause for leaving the firm. Second, it is important to appoint host-country mentors who have worked in the home office and are familiar with both the home and host cultures. This is important because home office experience is necessary for identifying the nuanced differences in cultures and helping expatriates overcome the culture-shock they almost invariably experience (i.e., their inability to get themselves understood completely, or understand the communication of others completely, owing to the differences in culture).

In terms of what mentors should do, it is important to recognize that they cannot serve as a substitute for expatriate's attitude toward the assignment, or their training and orientation. Mentors play a unique and complementary role in terms of serving as advocates for the expatriates in the home office while they are away in terms of ensuring that: (a) *out of sight* does not translate into *out of mind* in the home office; i.e., they retain their political connections in the home office, (b) they are kept informed of changes occurring in the home office and kept "in the loop," and (c) they receive career-enhancing opportunities as they emerge upon their return. In this regard, the task of mentoring changes with the stage of the expatriate experience. Exhibit 1 reflects the checklist we derive from expatriate voices that can speak to current and potential home-office mentors, and to human resource functions concerned with developing job descriptions and methods of performance appraisal.

Finally, the data strongly argue for a definition of mentors in ways that can create interdependencies between them, the expatriate, and the firm. At present, the mentor-expatriate relationship is strongly characterized by dependence, and severely dampens efforts to implement the mentor concept. For instance, most firms do not appoint a formal mentor, leaving expatriates to their own devices. While some seek informal mentors based on their personal relationships, the mentors seem to define their role as a favor to a junior colleague, and as something outside of their formal job description. Among the few firms that do appoint a mentor, mentoring is viewed as a volunteer activity, and hence loosely defined. In either case, this serves to create a dependency relationship between mentors and expatriates. Absence of mentoring clearly puts the expatriate at a disadvantage, however, poor mentoring puts the expatriate in an untenable situation; i.e., poor mentoring hurts the expatriate's career, but does not hurt the mentor. We therefore infer that firms ought to: (a) assign formal mentors in the home and host countries, (b) define the relationship in interdependent terms rather than as a dependency situation, (c) have expatriates (in addition to the supervisors of the mentor in home and host offices) evaluate the mentor performance, and (d) have such evaluation factor into the careers of the mentors.

EXHIBIT 1
MENTOR ACTIVITIES: A CHECKLIST

During the Pre-departure Stage (6-12 months prior to starting the overseas assignment):

Principal challenge: Ensuring that the motivations and expectations of volunteering managers (or selected managers) match with the intentions of the firm.

Checklist:

- Discuss the nature of the new job overseas (job objectives, responsibilities, desired outcomes). Explain how the effectiveness of the expatriate's performance will be assessed. Define the parameters of a *successfully completed* assignment.
- Share the firm's intent in sending the expatriate to the foreign location; explain how the action fits with the overall human resource and organizational strategy.
- Explain the support the firm will provide (monetary, psychosocial) for multiple purposes (travel, living, training, family, trips home etc.)
- Initiate conversations with potential expatriate about their expectations. As a result, develop informed answers to the questions:
 - Why is the person volunteering to go?
 - What do they expect to learn while stationed in the foreign office?
 - What kind of acknowledgement and reward do they expect from the firm after their tour of duty?
- Explain what the expatriate can expect to receive from the firm upon return, in terms of the choice of careers, acceleration in careers, and other likely rewards.
- Arrange for training (language, cross-cultural communication).

During the Pre-departure Stage (2-5 months prior to starting the overseas assignment):

Principal challenge: Initiating of communication links between manager and host office personnel, and begin the process of acculturation.

Checklist:

- Assign a host country mentor, help potential expatriate develop close communication links.
- Arrange for an inspection trip (for the purposes of gaining familiarity, finding housing (in appropriate cases, childcare and schooling), initiating formal and informal networks with key personnel in the host environment).
- Help potential expatriate develop a network of relationships with key people in the host office.

During the Overseas Assignment (First 6 months)

Principal challenge: Ensuring that the expatriate does not feel "out of sight is out of mind," and can focus on local task. Ensure that the expatriate stays in the consciousness of key decision makers in the home office.

Checklist:

- Ensure that the communication networks in the home office include (and not bypass) the expatriate.

- Manage the communication link between expatriate and the home office (i.e., ensure all questions get answered promptly).
- Schedule and manage regular contact (phone and email), and ensure progress reports reach all concerned personnel in home-office.

During the Overseas Assignment (6 months onwards till 6 months prior to repatriation)

Principal challenge. The expatriate is networked and connected to the home and host office.

Checklist:

- Ensure that scheduled communication between expatriate, home office personnel, and host office personnel, goes according to plan.
- Sponsor/arrange expatriate visits to home office for important meetings.

During the Overseas Assignment (6 months prior to repatriation)

Principal challenge: Ensuring that plans for assimilating returning expatriate in careers that utilize their new learning, provide acknowledgement of service, and match the firm's and the expatriate's expectations – are initiated.

Checklist:

- Identify multiple positions that might be suitable for the returning expatriate. Initiate conversations with potential supervisors.
- Begin discussions with expatriate about new responsibilities, starting dates.
- Discuss re-location issues such as moving expenses, housing, and re-connecting to networks in the home office.
- Sponsor/arrange for pre-repatriation visit (for the purposes of re-gaining familiarity with new faces, (and when appropriate for finding housing, arranging childcare and schooling), initiating formal and informal networks with key personnel in the home office, meeting potential supervisors).
- Initiate re-accluration training.

During Repatriation (up to 1 year after expatriate's return to the home office)

Principal challenge: Ensuring effective logistics of relocation, and ensuring that the reality experienced by repatriate meets with expectations.

Checklist:

- Assist the expatriate during the physical move back to the home country.
- Arrange meetings and social events that help the expatriate re-connect with important networks back in the home office.
- Debrief expatriate (and define what the organization needs to learn, and identify the needs for re-organization in the way expatriates/repatriates are managed based on this learning).
- Train repatriate to serve as mentor for new expatriates.

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