

GETTING THE RIGHT FIT: EXPATRIATE SELECTION AND GLOBAL MOBILITY

By

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SIGNATURE PAGE

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DEDICATION

To my parents in heaven, Frank and Julie Peters.

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ABSTRACT

Leaders at multinational enterprises (MNEs) often lack defined specifications for selecting candidates for expatriate leadership roles and training. A gap in the literature exists in how leadership at small and mid-size enterprises (SMEs) with limited human capital and financial resources can apply an efficient process for identifying expatriate candidates who are the right fit for an overseas assignment. The intent of this study was to explore what hiring professionals at SMEs consider in selecting and training candidates for expatriate leadership roles to secure continued engagement and fit. A qualitative phenomenological research design was used in this study to understand the participants' lived experiences and examine how the construct of vital engagement could be applied as the basis for evaluating a candidate's motivation and personal characteristics for an international assignment. The target population for this study included executives in HR, line management, and at the C-level who had SME experience and were involved in selecting employees for expatriate assignments and training. Participants were identified through criterion-based and snowball sampling techniques. Individual semistructured interviews were conducted, and the data were analyzed and coded to identify common themes, conceptual categories, and subcategories to make sense of those shared experiences. The findings of this study revealed approaches and recommendations for action that hiring managers at small and mid-size MNEs could take in selecting candidates for expatriate assignments and training. Asking interview questions that focus on the inevitable difficulties of living abroad may lead the expatriate candidate to reflect on the various factors impacting their motivation to work overseas. Since several participants discussed an industry trend to limit the benefits and

compensation extended to expatriates, future related research may focus on how a reduction in the offered expatriate benefits might alter how hiring professionals recruit for overseas assignments.

CHAPTER 1: INTRODUCTION TO THE STUDY

Leaders of multinational enterprises (MNEs) rely on expatriates to manage and support their overseas operations. However, clearly defined criteria for selecting expatriates are often lacking. MNE expatriates are typically sent on international assignments to either ensure operational consistency, transfer knowledge and skills, or develop their global leadership skills (Caligiuri & Bonache, 2015; Edstrom & Galbraith, 1977; McNulty & Brewster, 2017). When on an international assignment, those company-assigned expatriate managers frequently face more challenging living and working conditions, ranging from communication differences to workstyle approaches, than they typically would experience in a domestic assignment (Paik et al., 2017; Selmer & Luring, 2015). Selecting expatriates for continued engagement and fit in their assignments is vital to the overall strategic plan established by MNE leaders.

Past international experience and personal characteristics all factor into how well an expatriate will adjust to being relocated overseas. Global mobility is the process whereby organizations relocate their employees temporarily from one country to another to accomplish a specific task or organizational goal (Caligiuri & Bonache, 2015; Collings, 2014; Shaffer et al., 2012). Sending the wrong person on an international assignment could cost a company substantially (Black & Gregersen, 1999). The compatibility between a person's characteristics and the tasks performed at work can be described as the person-job fit (Memon et al., 2015). It is in the best interests of an MNE's leadership to support a global mobility process for selecting expatriates who are the best fit for their overseas positions.

The transition to an international assignment often leads to additional stress. Expatriates must face the challenges of adapting to a new work situation while leaving behind their social network of friends and family. The COVID-19 pandemic has led to expatriates experiencing heightened levels of fear, anxiety, and depression, which hindered work performance (Sahoo et al., 2022). More specifically, those additional global mobility stressors may result in an individual experiencing increased job dissatisfaction, social withdrawal, poor performance, and a desire to return early (Davies et al., 2019). Therefore, the selection process for expatriate leadership roles should include assessing both the technical and managerial facets of the job and the cultural aspects of the new culture (O'Sullivan et al., 2002). To address the broad challenges expatriates face working overseas, MNE leaders should support implementing an expatriate selection process that aids in predicting a candidate's capacity to adapt to a new culture.

Study Background

Managing human talent and having the right employees in positions is a competitive advantage for MNEs; however, global staffing and the need to select and fill critical positions in dispersed international locations remains a significant concern for company leaders (Collings & Isichei, 2018; Valk, 2021). Selecting expatriates who are likely to be a good fit should be a priority for hiring managers since having expatriates complete their assignments successfully is a competitive advantage for MNEs (C. H. Wang & Varma, 2018). International expansion and global mobility depend on identifying expatriate candidates with the needed experience, skills, and personal characteristics for working in an overseas assignment.

International staffing needs are among the most crucial aspects of MNE global expansion. However, predicting expatriate success based on set personal criteria remains challenging for companies (Davis et al., 2018; Kealey, 2015). Predeparture steps that MNE hiring managers can take to select and prepare expatriates to work overseas and lessen the possibility of expatriate failure could save those companies time and money (Kealey, 2015; O'Sullivan et al., 2002). MNE hiring managers could benefit from a systematic global mobility selection process that increases the probability of expatriate success.

Not all MNEs are large companies; many small and mid-size enterprises (SMEs) with operations in multiple countries are also considered MNEs. When SME leaders first begin internationalizing their companies, those businesses usually lack established hiring processes. As a result, expatriates in those new SMEs are often selected solely for their technical skills (Festing, 2007). For many SME leaders, the lack of proven HR policies related to global mobility is one of the most significant challenges in expanding globally (Festing, 2007). Given the limited resources of most SMEs compared to larger companies, any process for enhancing expatriate selection may be more acceptable if it is cost-effective and straightforward to implement.

Current State of the Field

The internationalization of MNEs requires expanding operations into new overseas markets. For most MNE operations, the headquarters is based in the home or parent country, and the subsidiaries are located in the host countries (Iwashita, 2019). As MNE leaders expand operations to enter overseas markets and attract new customers, there is a growing demand for staffing those positions with individuals who can work

effectively in other countries and cultures (Valk, 2019). Those abilities are especially critical for long-term international assignments that are one to five years in duration (McNulty & Brewster, 2017). Overall, there is a shortage of leaders for MNEs who can operate effectively in a global environment (Dragoni et al., 2014). MNE international expansion often demonstrates the need for expanded company resources for systematically creating global mobility requirements for new talent.

The COVID-19 pandemic has influenced the lives and work habits of people worldwide. Leaders at MNEs are exploring ways of working across borders by adopting technology-driven virtual solutions that are less costly and faster than traditional approaches (Selmer et al., 2022). The benefits of working virtually with colleagues worldwide will influence cross-border management in the post-COVID world. However, Caligiuri et al. (2020) posited that even though virtual technology may reduce the need for short-term international travel, the need for expatriates on long-term assignments who can serve as a bridge between headquarters and host-country national employees will still exist. In an article on trust in virtual teams, Breuer et al. (2016) suggested that team trust has an even stronger correlation with team effectiveness in a virtual environment. Synthesizing these perspectives on cross-border teamwork in a virtual environment, it is clear that while technological advancements will lead to a change in the global business landscape, a need for expatriate managers remains.

In addition to enhancing how companies can coordinate their operations globally, the COVID-19 pandemic has created new challenges for those overseas. The results of one survey indicated that 82 percent of all MNEs now have work-from-home arrangements for expatriates (Mercer, 2021). Those virtual work arrangements, however,

have increased concerns about social isolation. Expatriate employees who feel only minor anxiety or depression in their home country may experience higher levels of those same feelings overseas due to missing their existing personal support network (Cornacchia & Geoblue, 2021). Collings and Sheeran (2020) posited that the uncertainty and health concerns stemming from the COVID-19 pandemic might influence company leaders to increase hardship payments and offer higher levels of health insurance as incentives for expatriation reluctant to work in locations with perceived health risks. A need will always exist for expatriates who are on the ground at an overseas subsidiary, but the ability to attract candidates for those assignments may be more challenging. Once assigned, expatriates who experience increased stress and anxiety levels may be more likely to terminate their assignments early.

Failure in an international assignment can have broad implications. The costs of expatriate failure, whether in terms of returning early, poor performance, or damaged relations, can result in financial loss for a business, hinder in-country relationships, and damage the reputation of the company (Caligiuri & Bonache, 2015; Davis et al., 2018). The costs of moving expatriates overseas with their families vary. Still, in a study undertaken over a decade ago, Kraimer et al. (2009) suggested even then that the cost of a failed expatriate assignment could be as much as \$1 million. In addition, the early departure of an expatriate typically results in intensive efforts by HR managers to select, train, and relocate a replacement for that role (Nowak & Linder, 2016). To remain competitive and reduce expenditures, leaders at MNEs would benefit from assigning expatriates who are likely to enhance long-term company performance.

Another approach some company leaders take in reducing the cost of assigning employees overseas is to reduce the overall compensation package. Rather than offering what is sometimes referred to as a "full expat package," a company may decide only to provide a "local-hire" package (Goldstein, 2015). In a local-hire arrangement, the employee transferred overseas works on a local-contract basis and is compensated at the equivalent rate of the company's other locally hired employees (Goldstein, 2015). In that case, the local-hire employees posted abroad may not receive all the additional perquisites or "corporate perks" such as housing, dependents' tuition, and health insurance. McNulty and Brewster (2017) suggested a lack of consensus persists regarding the meaning of the term expatriate. The authors further suggested that employees on a local compensation arrangement may even be treated differently by their companies, receiving lower pay and less training, support, and career guidance (McNulty & Brewster, 2017). A determining factor regarding the compensation offered to employees sent to work on an international assignment is whether the companies can still effectively recruit needed employees on a local package.

International MNE staffing needs are the most vital aspect of international expansion. Meeting MNE strategic expansion goals requires sending employees on international assignments to add value and meet overseas staffing requirements (Valk, 2019). In a survey of multinational organizations' staffing needs overseas, it was found that the two most common issues driving an increase in expatriate assignments were global talent pool development at 45 percent, followed by an increased company presence in new markets at 38 percent (BGRS, 2021). The need for expatriates can be crucial to a MNE's strategic expansion into new markets.

While the term MNE usually refers to large multinational companies, SME leaders may grow their businesses into MNEs with the establishment of foreign subsidiaries (Stoiana et al., 2018; Vanninen et al., 2022). Driving factors for that internationalization could include entering new markets or gaining access to new global talent by acquiring existing overseas operations (Monaghan & Tippmann, 2018). The internationalization of a company is not dependent on its size.

The definition of an SME varies by country. In the United States, the federal government's Small Business Administration has developed a comprehensive table of standards for classifying a small business that varies by industry and sub-industry and considers the number of employees and annual receipts (U.S. Small Business Administration, 2019). For example, a business in the information industry could have 1,000 employees and generate \$30 million in revenue and still be considered a small business (U.S. Small Business Administration, 2019). Concerning those criteria, there were over 31.7 million small businesses in the United States in 2020 (U.S. Small Business Administration, 2021). While determining what percentage of SMEs would be classified as MNEs with overseas subsidiaries can be challenging, according to U.S. government statistics (U.S. Census Bureau, 2021), SMEs accounted for over one-third of all 2021 U.S. exports, with a value of over \$460 billion. Establishing an overseas operation is a more costly and resource-intensive endeavor for a company as compared with simply exporting goods overseas. However, even if only one percent of all small businesses have international operations, that would still constitute over 300,000 companies.

For mid-size businesses, the United States does not have an official definition. Ohio State University's National Center for the Middle Market (NCMM) is a leading source of research on American mid-size companies. The NCMM defines a mid-size company as having annual revenue of between \$10 million and \$1 billion (Farren & Makhija, 2021). About 200,000 U.S. companies fit that description (Farren & Makhija, 2021). That sizable number suggests that mid-size companies could be a significant portion of the U.S. economy.

When SME leaders initiate plans to expand overseas, they may face unique challenges in managing human resources (HR) requirements globally. SME leadership may face challenges in developing a work environment that fosters highly motivated and competent employees if they do not implement a structured process for supporting HR initiatives in their company (Massey & Campbell, 2013). In particular, the lack of qualified managers who can effectively work abroad may challenge SME leaders (Festing, 2007). In a study on HR management practices in SMEs, Bilan et al. (2020) suggested that when business leaders do not develop effective HR practices, personnel management processes are chaotic and not coordinated with other business processes. SME leaders may resort to filling expatriate positions using ad hoc methods that do not support long-term strategic plans.

Historical Background

While the term expatriate may be interpreted differently and traditionally meant immigrant, the term is now increasingly used to refer to business expatriates sent overseas by their companies for international assignments (McNulty & Brewster, 2017). Academic research into business expatriate issues began in the 1950s as leaders of post-

War U.S. companies looked to expand their businesses globally (McNulty & Brewster, 2017). In an early study on managing overseas managers, Wallace (1959) suggested that steps for selecting men (and only men) for expatriate assignments should be based on demonstrations of loyalty, honesty, and ambition. Research has continued to focus on improving expatriate selection practices so that MNEs can better predict the types of employees most suitable for an expatriate assignment (Caligiuri & Bonache, 2015; Josien, 2012; Kartar Singh & Nik Mahmood, 2017; Kealey, 2015; C. H. Lee et al., 2017; Potter & Richardson, 2019). Personality characteristics, prior international experience, and language skills are primary factors affecting how an individual adjusts to working overseas (Caligiuri & Bonache, 2015; Shaffer et al., 2012; Tung, 1981). Selecting expatriates based on person-job fit could include assessing for personality characteristics, work-related skills, and prior experience.

Identifying knowledge, skills, abilities, and other characteristics (KSAOs) relating to expatriate selection encompasses many aspects of human behavior. Research on identifying a person's characteristics to better predict success in international assignments has involved research in such fields as human resources management, international business, and global mobility (Renshaw et al., 2020). The unique and measurable KSAOs of individual MNE employees constitute a company's human capital (Ployhart et al., 2014). Having a ready pool of human capital talent to draw from for a global mobility program is a competitive advantage for MNE leaders (Valk, 2019). However, if the process of selecting an expatriate is done haphazardly or without a strategic focus, the result could lead to a poor candidate choice (O'Sullivan et al., 2002). Hiring managers

may have a tactical advantage by establishing criteria for assessing candidates for overseas assignments.

KSAOs are one way to establish expatriate hiring criteria. Individuals with certain KSAOs can be expected to be more successful in adapting to foreign environments (Caligiuri, 2013; Valk, 2021). Just as significantly, having a balanced combination of interrelated KSAO competencies often depends on having prior overseas experience (Valk, 2021). Therefore, previous overseas experience may be a key criterion for expatriate selection.

Some expatriates may receive company-arranged training before they start their international assignments. Individuals with specific aptitudes, such as a facility in linguistics or personal attributes like curiosity and tolerance for ambiguity, may respond to predeparture training better than those without those aptitudes (Johnson et al., 2006). Identifying specific KSAOs may be a key consideration in determining which expatriate candidates will benefit the most from predeparture training if they lack specific skills and experience.

Following a set process for identifying specific competencies can be beneficial for selecting candidates for expatriate leadership roles. The process for assigning expatriates within MNEs varies. The hiring manager may be a business line manager with no knowledge of the cultural challenges of living overseas or a qualified HR professional familiar with expatriate work challenges but without any understanding of the technical requirements needed to fulfill the international assignment (O'Sullivan et al., 2002). It is estimated that hiring decisions for international assignments at more than 90 percent of MNEs are still based primarily on technical expertise (Peltokorpi & Froese, 2012;

Schuster et al., 2017). Finding managers with the appropriate skill set and technical background is critical if MNE leadership focuses on knowledge transfer and skill development between the expatriate manager and host-country nationals.

Multiple variables can impact the effectiveness of knowledge transfer within an organization. Huan et al. (2017) suggested that such factors as the ability to articulate knowledge and the abilities of others to absorb knowledge can impact knowledge transfer. The authors further suggested that the transfer can be explicit through formal training or tacit, such as through observed behavior or actions (Huan et al., 2017). Transferring knowledge within an organization can involve a company-led formalized process that encourages sharing. Successful knowledge transfer also assumes people are willing to participate in the process. Even with the importance of professional skills in expatriate selection, criteria that extend beyond purely technical considerations should also be considered.

Another form of knowledge transfer occurs when expatriates share knowledge about corporate practices and provide entrees to key MNE headquarters contacts who can assist with issues at the overseas subsidiary. Mutual trust based on the subordinate trusting the leader and the leader trusting the subordinate can result in improved cooperation, information sharing, and task performance (T. Y. Kim et al., 2018). When considering whether to send someone on an overseas assignment, senior managers frequently consider factors such as the candidate's technical expertise, years of service, and the trust the managers place in the individual (Martins & Diaconescu, 2014). Expatriates who enjoy a mutual-trust relationship with their supervisor may have the potential to add more value when working overseas. The impact of mutual-trust

relationships can be even more significant when those interactions involve senior-level leaders at headquarters who are in a position to influence selections for expatriate assignments.

Having a process for expatriate selection that is effective yet streamlined can be beneficial for hiring managers at MNEs. If the criteria for selecting talent are too complex, line managers who do not fully grasp those constructs may consider other factors (McDonnell et al., 2021). Thus, increasing the capabilities of HR professionals to hire for international assignments effectively could free up time for line managers to focus on their core job requirements (Festing, 2007). How hiring guidelines are developed and implemented could ultimately determine how readily hiring managers would accept those processes.

Larger and more established MNEs tend to have an active HR section responsible for employing, training, developing, and compensating company employees worldwide. Those larger entities may also have a focused international human resources management section within a broader company-wide initiative to position HR as a strategic function. International assignment management can be one of the more challenging aspects of HR management since variables for overseas positions can vary significantly from country to country (Society for Human Resource Management, 2017). Supporting expatriate assignments can be a complex role for HR professionals to master.

For larger MNEs, the HR section may have a separate office responsible for managing the global mobility (GM) function. Compared with the broader term of global mobility of an expatriate workforce, the GM function within HR is centered on the administrative aspects of sending expatriates overseas, such as arranging payroll

transactions, ensuring tax compliance, and meeting visa requirements (Caligiuri, 2013; Valk, 2019). Effectively handling those responsibilities is critical for placing and supporting expatriates in their international assignments.

Some MNEs will also have a global talent management (GTM) function responsible for developing the human capital resources of an MNE. Those human capital resources are enhanced by arranging assignments or training that will augment employees' skills to help meet the global needs of the company (Caligiuri, 2013). GTM can be a unique advantage for an MNE in industries competing over scarce talent and can be one of the most critical factors impacting future growth strategies (Caligiuri, 2013; Tarique & Schuler, 2018). For MNEs operations that house distinct GM and GTM functions, the HR sections handling those functions may be individual units that act separately from each other, or they may coordinate closely on joint programming (Caligiuri, 2013). For smaller MNEs, those specific HR functions as distinct roles may not exist.

As first presented in the seminal work by Edstrom and Galbraith (1977), expatriates are often assigned as part of a corporate strategy to develop management talent, expand and strengthen organizational control, or fill a specific need or position (Caligiuri & Bonache, 2015; McNulty & Brewster, 2017). In the case of the first two examples, the most senior leaders in the company are often involved in that decision. For instance, in the case of a new subsidiary operation, the leader placed in charge of that operation often is handpicked by headquarters leadership (Dutta & Beamish, 2013). Even if there is a strong HR team in place, HR management may be seen as more of an

implementer than a decision-maker in the expatriate selection process if the CEO, the COO, or other members of the C-suite have already made a decision.

There is no single approach to implementing an HR program. Even in MNEs with a long global history, senior leaders often perceive the HR function as an operational tool for processing employees' requirements rather than as a strategic tool in global expansion (Caligiuri, 2013; Valk, 2019). Part of the challenge in positioning HR as a MNE strategic tool is too often a result of the limited overseas experience skills and experience of most HR staff in U.S. MNEs. HR managers often lack the international experience that would be useful in selecting and assigning expatriates (Black & Gregersen, 1999; Valk, 2019). Undertaking an expatriate assignment introduces additional stress for the employee as issues such as housing, schooling, medical insurance, and travel documents must be addressed before departure (Aycan, 1997). If HR professionals lack an understanding of the new challenges and stresses that expatriates face, they would not be well-positioned to share those insights with all parties involved in the hiring process. A hiring process that is focused on attaining a good person-job fit consists of hiring managers who fully appreciate the broad tasks and roles of an international assignment.

Working on an international assignment typically involves adjustments to an expatriate's work and living arrangements that may require a broad range of skills not directly job-related. Traditionally, companies relied mainly on the technical and business skills needed for a long-term international assignment (Maurer, 2016; O'Sullivan et al., 2002). Depending solely upon technical competencies and skills when selecting a person for an expatriate assignment does not provide perspective in evaluating whether the candidate is the right fit for the assignment (Caligiuri et al., 2009). Without a standard

approach to assessing candidates for international assignments, employees may be selected who will have greater difficulty adapting to work overseas.

Working as an expatriate typically involves adjusting to a new culture. Cultural competence is how a person applies knowledge, skills, and personal attributes to work successfully in another culture (Johnson et al., 2006). A breadth of experience across multiple cultures in terms of length and variety of international experiences offers those individuals insights into handling common feelings of foreignness as they adapt to a new culture (Rickleby, 2019). The resiliency skills needed to adjust to challenging work conditions in a developing country may differ from the interpersonal and communications skills most important in a more developed country (D. Wang et al., 2017). Starting an international assignment involves establishing a new social and work-related network of contacts. Previous roles adjusting to a new culture can shape the range of KSAOs individuals can bring to an international assignment.

While prior overseas experience has an impact on a person's ability to adjust to a new culture, other personality characteristics can also affect that process. Having an efficient method for identifying the competencies, motivations, and interests of expatriates can be beneficial for MNE hiring managers. The construct of vital engagement takes into account a person's values and beliefs by considering activities that bring an individual enjoyment and meaning (Nakamura & Csikszentmihalyi, 2004). The construct of vital engagement may be applicable for predicting expatriate success in an international assignment.

By applying the concept of cultural competencies through the lens of vital engagement, hiring managers can improve their ability to identify the candidates with the

best cultural competence by asking such basic questions as past experiences about eating ethnic foods or watching foreign films. MNE hiring managers can first screen for business and technical skills and then assess cultural competencies. This approach would enable the recruiting manager to evaluate a candidate's suitability more precisely for an international assignment. The employees selected for an international assignment could then undertake cross-cultural and other appropriate training if needed. Leveraging vital engagement may be a manageable approach that SME hiring managers could implement if their company lacks the resources and formalized processes for international assignment selection.

Deficiencies in the Evidence

While much research has focused on steps to expand the role of HR within large MNEs, there is still a lack of research on basic steps that HR managers and other hiring managers could take in small and mid-size MNEs to enhance the predictability of selecting candidates most likely to succeed in an expatriate assignment. MNE hiring managers often lack an understanding of the criteria for improving the predictability of expatriate success (Caligiuri et al., 2009). An objective of this study could be to fill that gap by gaining insight into how to apply a question-based approach that MNE hiring staff could use to enhance predictability. A study in that area could potentially be a helpful management tool for selecting candidates for expatriate leadership roles to improve organizational performance.

No previous studies on global mobility have included an examination of expatriate selection through the lens of vital engagement theory. To address this gap, an objective of this study is to review the criteria hiring professionals at MNEs use in

considering applicants for expatriate positions and the resulting questions they use in screening and selecting candidates. The research examined in this study may be helpful for MNE hiring managers who need to prepare and select expatriates for overseas assignments.

Using a mixture of search terms such as expatriate success, global mobility competencies, and expatriate selection to find results in scholarly articles on the topic suggested that, in practice, very few MNEs, and even fewer SMEs, use a strategic HR process in selecting expatriates. Often the selection process for international assignments remains intuitive and ad hoc (Collings, 2014). An issue raised in some studies indicated that HR managers lacked overseas experience or advanced knowledge of strategic expatriate hiring (Black & Gregersen, 1999; Valk, 2019). The company's organizational structure and the hiring managers' expertise level may influence how well the selection process for international assignments is carried out.

The study may contribute to the literature by exploring how the construct of vital engagement proposed by Nakamura and Csikszentmihalyi (2004) can be applied to finding the right fit in assigning expatriates with the appropriate skill set, experience, and competencies. Building on that perspective, the focus of this research is to explore ways for hiring managers to identify and select employees for their first expatriate assignment. Since no previous studies in this field have included an examination of expatriate selection in smaller MNEs through the lens of vital engagement, the findings of this study could potentially contribute to the literature on global mobility and expatriate selection and fit for an international assignment.

Problem Statement

The problem is that many leaders at MNEs do not have clear and defined specifications for selecting candidates for expatriate leadership roles. The absence of criteria for enhancing expatriate success predictability is challenging for numerous organizations because a structured and practical approach is lacking (Caligiuri, 2013). Expatriate failure can be costly for HR professionals at MNEs who may need to identify, train, and relocate replacements for the expatriate assignment (Nowak & Linder, 2016). Although global expansion is a strategic priority for many MNE leaders, poor expatriate selection can impede those international strategic plans.

In many MNEs, the hiring process for expatriates lacks clarity. Often headquarters managers do not fully appreciate or understand the cultural challenges of moving and then working overseas (Johnson et al., 2006). Those challenges may be even more significant for SME operations that lack the HR resources of larger companies (Behrends, 2007). The focus of this study is on the selection of expatriates who have not already completed an overseas assignment with their existing company. Employees who have had multiple overseas assignments with the organization are more likely to have already demonstrated a capacity to adapt to an international assignment.

The plans of company leaders to strategically expand business operations internationally require having the right people on the ground to implement those plans. Expatriate success is based on meeting organizational objectives and completing assignments (Davis et al., 2018). Given the new challenges that expatriates may face living overseas for an extended time, non-work-related factors may be a significant factor

in premature departure (O'Sullivan et al., 2002). A key factor in international assignment selection is that an expatriate's role differs from a more typical domestic assignment.

International assignments often entail a broad scope of areas that require the expatriate to adapt. Expatriate performance depends not only on meeting one's job requirements but also on the ability to function in the cross-cultural context of the international assignment (Caligiuri & Tarique, 2012; Johnson et al., 2006). The concept of cultural competence encompasses both the job-related tasks of working overseas as well as the daily-life aspects of living abroad such as socializing, commuting, and shopping (Johnson et al., 2006). Employees on international assignments can be expected to adapt to a new environment that encompasses more than just job-related conditions.

Relocating a domestic employee and their family for an overseas assignment can be a costly undertaking. Often MNE leaders make substantial investments in relocating managers and their families overseas in a compensation package that could include such costs as housing, schooling, and airfare (Andrade, 2018). The premature departure of an expatriate not only incurs high costs for a company but can also hurt its financial performance and tarnish its reputation (Mahajan & Toh, 2014). Much of the failure of expatriate assignments can be attributed to poor procedures for expatriate selection (Johnson et al., 2006). Therefore, MNE leaders have a vested interest in supporting an expatriate selection process that evaluates a candidate's ability to adjust to working overseas and enhances the predictability of expatriate success,

The issue of expatriate selection is of importance in the field of global leadership. The process of international assignment selection is challenging since job content and job context are both critical variables in expatriate success (Caligiuri et al., 2009). None of

the studies reviewed have examined the expatriate selection process through the lens of vital engagement theory. To address this gap in the research, this study provides a review of the criteria hiring professionals at small and mid-size MNEs use in considering applicants for expatriate positions and the steps taken to screen and select expatriates.

Audience

The results and recommendations generated by this study may provide MNE hiring professionals with an efficient and effective approach for expatriate selection before sending employees on an overseas assignment. The beneficiaries of this study are hiring managers at SMEs who need to prepare and select expatriates for overseas assignments and the expatriates themselves. The research may also benefit expatriates who are more likely to succeed in their international assignments if they have the right person-job fit for the expectations of that overseas role. The results of this research add a fresh perspective to the existing research on global mobility.

Specific Leadership Problem

Change is inevitable for companies competing in an evolving business environment requiring a competitive advantage. The success of such organizational change is determined by how that transformation takes place within the business (Kotter, 2012). The role of the chief executive officer is crucial in the case of small and mid-size MNE leaders planning to internationalize their businesses to compete more successfully against other companies (Festing, 2007; Hsu et al., 2013). For many MNEs, implementing a strategic process for selecting employees for international assignments requires the active support of senior leadership (Mirfakhar et al., 2021). The support of company leadership is vital in implementing lasting change.

Leaders can transform companies by making changes to the corporate culture. Leaders can also ensure investment in their organization's resources to provide training to build cultural competencies (Caligiuri, 2013). Compared to cultural intelligence, cultural competencies assume that the individual actively applies their cross-cultural knowledge, skills, and personal attributes in a new cultural setting (Johnson et al., 2006). Leaders can play a critical role in implementing an active organizational change approach to modify the company culture (Kotter, 2012). Leadership may need to take an active role in repositioning HR to improve its strategic function. Leveraging HR as a strategic tool may require a steady and long-term focus from company leaders.

Communication is a crucial aspect of that organizational change. Leadership is essential in championing the need for cross-cultural experiences and communicating the benefits that those experiences can bring to the company (Caligiuri, 2013). Leaders who want to influence HR procedures in the company must demonstrate ongoing commitment if those changes are to take root in creating policies that lead to specific practices at all company levels (Mirfakhar et al., 2021). Enhancing the role of HR management in the expatriate assignment process requires ongoing support at the highest levels of the business.

A company's employees are often the most valuable asset of a business. Given the importance of human capital in an MNE, it is surprising that many company leaders do not make establishing clear criteria for expatriate selection a higher priority (Valk, 2021). As with any other significant organizational change, the shifting of organizational priorities requires all stakeholders to see the importance of anchoring those new practices in the work culture (Kotter, 2012). How HR departments are organized, how they hire to

fill those positions, and how they are involved in the strategic selection of expatriates are vital for enhancing a company's global mobility processes (Valk, 2019). Implementing this approach could include taking some basic initial steps by asking directive questions in the assignments process to determine whether the candidates demonstrate the desired competencies.

Purpose of the Study

The purpose of this study was to explore the criteria that MNE hiring professionals can use to select candidates for expatriate assignments and predeparture training by considering personal characteristics and attributes that impact international assignment suitability. Traditionally, many MNE hiring managers relied upon identifying individuals with job-related technical or business skills as a key factor in expatriate selection (Peltokorpi & Froese, 2012; Schuster et al., 2017). However, personality factors should be considered equally since certain traits can impact how expatriates cope with the stress of working overseas (Huff, 2013; Schuster et al., 2017). Expatriates with overseas experience who possess particular traits, such as knowledge of other cultures (Alon et al., 2016) and openness to new experiences (D. Wang et al., 2017), might be better prepared to work in a new culture. Evaluating candidates for international assignments for personality characteristics can play a vital role in identifying those more likely to succeed as expatriates.

Hiring managers also would benefit from knowing the underlying motivation to work abroad. Screening a candidate's motivations for pursuing an expatriate position could help detect factors that might hinder success in an international assignment (Cerdin & Le Pargneux, 2009). Assessing an expatriate candidate's personality characteristics can

aid in identifying the most motivated individuals (Caligiuri et al., 2009). By combining these perspectives on traits and motivations for effective expatriate selection, it is clear that a candidate's mix of traits, experiences, and motivation could be beneficial in predicting how they may adjust to an international assignment.

Those competencies, traits, and motivations which constitute an expatriate's attributes could be grouped under several domains. Just as importantly, characteristics beneficial for adjusting effectively to a new culture could include individual elements that extend beyond the technical requirements of a job (Caligiuri et al., 2009). For this study, those domains could comprise factors such as a willingness to travel, curiosity in trying new cultural experiences, openness to facing ambiguity in a foreign setting, or resiliency in creating new social networks overseas. Those factors applicable for international assignments all fall outside the daily technical and business routines of a job and yet could be crucial in predicting expatriate suitability.

The aim of this qualitative study is to examine and report to what extent hiring managers can effectively determine the traits, characteristics, and motivations of candidates applying for expatriate assignments by evaluating the mix of interrelated elements. One such element is personality traits; a second element is cultural competence; a third element is vital engagement. Specific personality characteristics could serve as a framework for identifying those individuals who would be more adaptable to working in a new cultural setting (Caligiuri et al., 2009). Identifying those elements will examine factors that could be beneficial in determining the right person-job fit for an international assignment.

Significance

Developing an enhanced understanding of the competencies of successful expatriates could impact the scope and approach of hiring practices used in selecting employees for international assignments. Results from previous studies have estimated expatriate failure rates (as measured by early returns) to be approximately 15 percent to 40 percent for U.S. companies; those who remain on the job but perform less than adequately are estimated to be at about 50 percent (Kealey et al., 2004). Those failures can be expensive for those MNEs. It is estimated to cost between \$300,000 to \$1,000,000 per expatriate assignment, making those expenditures one of the most significant employee compensation expenses for a MNE (Schuster et al., 2017). Combining those two perspectives on the relatively high rate of failure and the cost of sending an expatriate overseas, it is clear that steps to enhance expatriate success could affect a company's bottom line. Given the limited resources that SME leaders need to balance, any measures to improve how expatriates are selected for international assignments could directly impact the profitability of the SME.

Research Questions

The focus of this study centers on the issue of selecting candidates for expatriate assignments and predeparture training. The research questions and the subsequent findings may provide more structured and strategic approaches to selecting employees at small and mid-size MNEs for international assignments based on personality traits, cultural competencies, and behavioral indications demonstrating vital engagement. The research questions are as follows:

R.Q. 1 What do hiring professionals consider in selecting candidates for expatriate leadership roles to secure continued engagement and fit?

R.Q. 2 What do hiring professionals consider in training candidates for expatriate leadership roles to secure continued engagement and fit?

Methodology Overview

By understanding the shared experiences of individuals, this study provides insights into common issues and outcomes faced by hiring managers when selecting employees for international assignments. The application of a qualitative methodology for this research offers a structure to examine closely the various meanings that individuals ascribe to an experience (Creswell & Creswell, 2018). The aim of that approach would be to study the essence of the shared experience.

Phenomenology is the preferred form of qualitative research for this study. Phenomenological research design requires an in-depth study of a specific phenomenon to understand the nature of an experience that participants have undergone (Vagle, 2018). A phenomenological research design would be more specific to the issue of expatriate selection and could more readily accommodate interviewing hiring managers of expatriates at MNEs. The objective of this study is to conduct interviews with HR professionals and other hiring managers at small and mid-size MNEs. Those interviews could include an exploration of a company's current procedures for selecting expatriates for overseas assignments.

Study Limitations

Limitations of this study include targeting the research population to a restricted sample size of SMEs with headquarters in the U.S. The semistructured interview results may not have been representative of all hiring managers responsible for expatriate selection who could have potentially participated in the study. Since the interviews were

conducted synchronously using Zoom or a similar videoconferencing application, limitations may occur due to technical difficulties and connection reliability. Participants also may have responded differently in a virtual setting than in an in-person interview. Since phenomenological research requires the researcher to code and arrange themes from the shared experience, distortions in interpreting the data may have occurred due to the subjectivity of the study. Researcher preconceptions and experiences are difficult to avoid. However, acknowledging potential bias and adhering to bracketing to suspend judgment could reduce the potential problem of prejudiced views (Chan et al., 2013).

Study Delimitations

The participating population included hiring managers with experience at small and midsize MNEs in selecting employees for expatriate selection. Those SMEs are U.S. companies that generate annual revenue of less than \$1 billion (Farren & Makhija, 2021). The SMEs need to have at least two expatriate employees based overseas, and the hiring manager has to have worked in that role for at least six months. While the study is designed to be transferable and trustworthy, the findings and results may not necessarily apply to other populations or future time periods, even within the same situation or settings.

Definitions of Key Terms

The study of expatriate selection and human resources management have terms particular to this field. The definitions of these terms sometimes vary depending on whether the study originated in international business, workplace diversity, or intercultural communications (Johnson et al., 2006). To clarify how those terms are used in this study, the following definitions are used:

Cultural Competence: Cultural competence is an individual's effective use in applying knowledge, skills, and personal attributes to work successfully with others from different cultural backgrounds (Johnson et al., 2006).

Cultural Intelligence: Cultural intelligence is the awareness, behavior, and motivation for learning to interact and deal with culturally diverse situations (Earley, P.C., Ang, 2003; Jyoti & Kour, 2015; Livermore, 2015).

Expatriate: For this research, an expatriate refers to a business manager who is relocated by their company to work in another country to complete a specific task or organizational goal (McNulty & Brewster, 2017; Renshaw et al., 2020; Valk, 2021).

Flow: Flow is a state of enjoyable mental concentration when a person focuses entirely on performing an activity for a short period (Nakamura & Csikszentmihalyi, 2005a).

Global Mobility Function: The global mobility (GM) function in MNE operations oversees the process of relocating a manager assigned overseas (Valk, 2019). In comparison, the more general term of global mobility refers to the movement of employees from one country to another for the length of an international assignment (Caligiuri & Bonache, 2015).

Global Talent Management Function: The global talent management (GTM) function is the HR role in evaluating and developing employees to meet the company's global needs (Caligiuri, 2012).

International Human Resource Management (IHRM): The focus of IHRM is to balance global and local priorities when employing, training, and compensating employees in an MNE operation (Farndale et al., 2014; Valk, 2019).

Multinational Enterprise (MNE): A MNE is an organization that produces goods or services in more than one country; the headquarters office is typically based in the home country and the subsidiaries are located in host countries (Iwashita, 2019; McNulty & Brewster, 2017).

Person-Job Fit: The person-job fit construct is the compatibility between a person's characteristics and those of the job or tasks performed in their work (Sekiguchi, 2007).

Small and Mid-size Enterprise (SME): An SME is a classification for an enterprise that is smaller than a large business and, based on guidelines commonly applied in the U.S., has annual revenue of less than \$1 billion (Farren & Makhija, 2021).

Vital Engagement: The construct of vital engagement incorporates the idea of complete absorption in undertaking a task and the sense of meaning and importance gained from doing that task (Nakamura & Csikszentmihalyi, 2004).

Summary

MNE leadership is focused on the growth and expansion of their companies as they enter new overseas markets. Having an available pool of globally mobile employees is essential for organizations whose leaders want to expand globally (C. Kim et al., 2019). The lack of a clear process and criteria for selecting expatriates and the limited international experience of most HR managers at U.S.-based MNEs increase the risk of expatriate failure at MNEs (O'Sullivan et al., 2002). This study uses phenomenological analysis to explore hiring managers' criteria for selecting candidates for expatriate assignments.

Analyzing the shared experiences of SME hiring managers involved in identifying candidates who have the right person-job fit for an international assignment adds to the literature on global mobility expatriate selection. Managers at SMEs may lack the developed HR policies of larger companies and, therefore, may need to rely on creative and efficient approaches for selecting staff to work overseas for an extended time. Insights into their selection process may expand the understanding of how companies choose employees for international assignments. Identifying employees who have the experiences and personal attributes that may assist them in adapting to a new culture may reduce the likelihood of selecting candidates who will prematurely terminate their international assignment due to cultural challenges. How those personal attributes can be identified by leveraging such concepts as personality traits, cultural competence, and vital engagement are explored in Chapter 2.

CHAPTER 2: LITERATURE REVIEW

The sections in Chapter 2 offer insights into significant themes raised in the literature. The first section is focused on the phenomenon of selecting and preparing expatriates for their international assignments. The second section includes a summary of three theories that could be used to analyze aspects of the expatriate selection process. In an article on the value of studying leadership theories, Kessler (2021) suggested that theories can serve as helpful lenses to highlight dimensions of leadership that otherwise might not be noticed. Evaluating key concepts within global mobility through a theoretical lens may likewise result in developing new insights.

Key Themes in the Literature

Supporting the global mobility of expatriates at multinational enterprises (MNEs) can be a vital component of the broader strategic goals of a company. Those expatriates on long-term assignments of one to five years will need to adjust to the differences in living and working overseas (Paik et al., 2017; Selmer & Luring, 2015). Assigning expatriates with essential technical, managerial, and cultural skills is critical for the long-term strategic success of the multinational enterprise (MNE). Leaders of MNEs need to have the right people with the required skills in the overseas MNE locations; otherwise, any plans for global expansion will fail.

Cultural Adjustment

How expatriates adapt to their new overseas working environment may be a factor of their personality traits and skills, prior overseas experience, and predeparture training. Cultural adjustment can include an awareness of cultural differences and an understanding of how to work across cultures (Vromans et al., 2013). In a study on

expatriate adjustment, Sousa and Goncalves (2017) posited that intercultural contact enhances an individual's ability to adapt; hence, prior exposure to different cultures should be a component in international assignment selection. The expatriate assessment process should involve an evaluation of previous undertakings, such as prior international experience. People who have previously lived overseas may still face challenges adjusting to a new culture. However, prior international experience living in a new culture can provide the expatriate with insights into the adaptation process.

Not all cultural adjustment assumes the adoption of local views or habits. In an article on cultural adjustment (Kennedy, 2018), the author posited that expatriate managers who adapt too fully to their new cultures are less well-received than those who continue to exhibit culturally inappropriate behavior. Expatriates who demonstrate too much adaptation to the local culture can also negatively impact long-term working relationships if the expatriate then needs to enforce host-country values that run counter to the local culture (Mumtaz & Nadeem, 2020). Expectations can play a significant factor in those relationships. When expatriates and host-country nationals are disappointed regarding unmet assumptions about how others should behave, that disappointment can result in decreased mutual trust and collaboration (Ljubica et al., 2019). A synthesis of those perspectives suggests that cultural adjustment can be a balancing act between knowing when to adhere more closely to local norms and when to exhibit the norms of one's home culture.

To what extent an expatriate manager adopts local customs and behavior may be determined by the expectations and requirements of their job. Cultural minimization is when an expatriate focused on achieving a common result, such as meeting stringent

production standards, may need to ignore cultural norms to ensure a common operating standard is followed (Caligiuri, 2013). As an MNE employee tasked with meeting company goals, expatriates may still need to break social norms to ensure adherence to company processes and standards (P. Y. Lee et al., 2018). While cultural adjustment can lead to greater expatriate effectiveness (C. Y. P. Wang et al., 2019), knowing when to adapt to local norms and when to ignore them is a vital skill in working overseas for an MNE. Prior experience living and working in a different culture may enhance an individual's nuanced understanding of when not to conform to local customs or behaviors.

Relocating expatriates and their families overseas can be a substantial investment for a company. Adjusting to a foreign cultural environment can result in multiple changes in the work and living environment for the expatriate workers, including differences in working standards, diverse healthcare systems, new languages, and new forms of cuisine (Noman et al., 2020). An expatriate's failure to adjust to a new culture often results in poor performance and increases the odds that the expatriate will fail to complete the assignment (Andrade, 2018). MNE leaders looking to reduce costs in their international operations are vested in ensuring practices are in place for selecting expatriates who are a good fit for the cultural challenges expected in an international assignment.

Company leaders who look to reduce the compensation package for expatriates to save on costs have to balance those savings with the ability to recruit expatriates with the necessary skills. The additional perquisites common in traditional expatriate packages, such as housing, dependents' tuition, or insurance coverage, were used to compensate for the expatriate's additional stress and family-life disruptions. Those perk allowances and

other benefits to the expatriates and their families are a specific strategy to retain talent and reduce turnover in expatriate positions in academia (Ngo-Henha & Khumalo, 2022). Without those allowances and benefits, companies may not attract the well-qualified employees needed to execute an international strategic goal. In search of a satisfactory compromise, some company leaders have approached this issue by modifying the compensation to balance out a local-pay package by providing more traditional expatriate offerings such as housing or incentive plans that form a local-plus package (Tait et al., 2014). In other instances, localization may be delayed as the expatriate transitions to a local compensation arrangement at either the company's instigation or their own initiative (Tait et al., 2014). How the cost savings from a local-pay package impact a company leader's ability to recruit skilled expatriates will ultimately determine the effectiveness of that approach.

Using social skills is vital in developing new relationships during an international assignment. Expatriates who effectively form social relationships with host-country nationals are likely to adjust to the new culture more readily (Pustovit, 2020). Moreover, expatriate managers who gain the support of host-country colleagues are less likely to prematurely terminate their assignment (Sokro & Moeti-Lysson, 2018). Leveraging social skills to establish strong working relationships while on an international assignment can assist in adapting to the new overseas environment. Nevertheless, while social skills can be a vital factor in determining how well an expatriate will transition to their new assignment, predicting an expatriate's ability to adapt to another culture is complex.

Even prior international experience is not a foolproof approach to selecting the right candidate. Working overseas often requires adapting one's lifestyle (Kealey et al., 2004). In keeping with that concept, while prior international experience can ease the adjustment to a new culture, it is not predictive of how effectively expatriates will transfer skills and knowledge (Kealey et al., 2004). If there is no knowledge transfer, the overseas assignment could be a failure. Thus, prior international experience may be an essential attribute to consider in selecting for an international assignment. But other personality characteristics can also help predict whether an expatriate is likely to succeed in meeting their assignment requirements.

Expatriate Failure

Expatriates who are ineffective in adapting to the new culture are more likely to fail in their international assignments. As previously described, failing to adjust to the foreign environment, rather than a lack of technical competence, is a major cause of poor expatriate performance and premature departure (Andrade, 2018). An ineffective expatriate leader can hinder the success of a company's strategic goals for international expansion.

Estimates regarding the percentage of expatriates who return early before completing their assignments differ greatly. As measured by premature departures, expatriate failure rates have been estimated to range from 15 to 40 percent (Kealey et al., 2004). Harzing (2016) posited that estimated expatriate failure rates vary widely since the data used to analyze that occurrence is not substantiated. That situation could be explained, in part, because reliable data may not exist. Although expatriates play a vital role in executing a company's global strategy, most MNE HR departments lack

established procedures for measuring the complex issue of expatriate return on investment (ROI) (Nowak & Linder, 2016). As a result, MNE leadership should have an even greater incentive to ensure that hiring managers focus on achieving the best person-job fit when evaluating candidates for international assignments. In short, if MNEs lack the HR resources to develop and measure the ROI of an expatriate assignment, it makes even more sense for HR managers to have a structured process of selecting candidates who can both achieve performance goals and handle the cultural challenges of an international assignment.

Failure in an expatriate assignment can take many forms. Returning early is only one aspect of a failed expatriate assignment. A failed expatriate assignment could include bruised relationships with host country employees or government officials, reduced productivity, or a damaged company image (Pokharel, 2016). Those examples show that underperforming expatriates can incur substantial costs for the sponsoring organization (C.Y.P. Wang et al., 2019). Since MNE staff may lack robust expatriate management processes for tracking the overall cost-benefit analysis of an assignment, MNE leaders would benefit by focusing on a front-end process for evaluating candidates to work overseas.

A factor to consider in the expatriate selection process is the requirements of employees at the host-country facility. Most employees at an MNE overseas facility are usually not from the parent country where the MNE headquarters is located. Instead, the majority of employees for an MNE are usually host-country nationals. Hiring managers should select an expatriate based on the expectations of the assignment and consider input from host country nationals on the work environment at the subsidiary (Potter &

Richardson, 2019). To reduce the risk of expatriate failure, MNE leadership would benefit by providing expatriates with realistic expectations of the obligations of the parent company and the subsidiary to minimize potential misunderstandings (Perera et al., 2017). The ability to work in a new environment with colleagues who may have different cultural values is crucial, as expatriate supervisors who receive support from host-country national employees are more likely to be successful in their assignments (Sokro & Moeti-Lysson, 2018). The non-technical skill of working with those from other cultures can significantly impact an expatriate's ability to perform effectively in an assignment.

Host-country nationals, often the most critical resource of an MNE's overseas operations, may experience the brunt of expatriate failure. An underperforming or poorly adjusted expatriate increases the additional and often unrecognized demands and stressors that local employees face when working with expatriate colleagues and supervisors (Fee, 2020). Therefore, the premature departure could result in the need for additional resources to select, train, and relocate a replacement for that role (Nowak & Linder, 2016). Early departure can also impact the host-country national employees, who may have to adjust their workloads again to deal with the loss of the expatriate's position (Fee, 2020). Synthesizing these views on the implications of expatriate failure suggests that headquarters leadership would benefit from considering the full effect of expatriate failure on the work environment of host-country employees at the impacted foreign subsidiary.

As mentioned previously, assigning employees overseas can be expensive. Costs for moving expatriates overseas with their families vary, but by one estimate, a three-year assignment that includes housing, transportation, and school as part of a full expatriate

family package could easily exceed \$3 million (Society for Human Resource Management, 2017). While there is pressure to reduce costs for overseas moves, often, MNE hiring managers do not know the total costs of relocating an employee to another country. One survey of 703 professionals responsible for the global mobility function within their organizations indicated that over 55 percent of the respondents did not track the data analytics for expatriate costs (Santa Fe, 2019). As such, while relocating expatriates can be costly, and the figures for expatriate failure are also assumed to be high, many MNE managers do not track those figures. Nevertheless, those expatriate failures could still result in increased costs for an MNE and ultimately impact a company's profitability. For a small and mid-size enterprise (SME), those costs could be a significant portion of overall employee expenses.

Those costs and other ROI calculations can be evaluated from both a short-term and long-term perspective. In their study on repatriation and corporate ROI, Breitenmoser and Bader (2016) suggested that few MNEs have formal repatriation strategies focused on onward positions once the expatriate assignment ends. Returning to their home country can be stressful for expatriates and their families. Without career path guidance, returned expatriates may find themselves stuck in positions that do not utilize their broadened international experience (Nery-Kjerfve & McLean, 2012). That circumstance can lead to a demotivated employee, hinder knowledge transfer within the business, and raise the possibility that the returned expatriate may leave the company (Nery-Kjerfve & McLean, 2012). MNE leaders concerned about the long-term ROI for their company regarding expatriate assignments may want to adopt repatriation policies that increase the

retention rates of returning employees and reduce the risk of losing the company's investment in developing the global perspective of the employee.

Expatriate Selection

Reducing the chances of selecting a company expatriate who adjusts poorly to the international assignment and terminates prematurely involves carefully screening candidates for international assignments. MNE leaders would benefit from a process for selecting employees for overseas assignments that considers job skills and personality traits, especially emotional stability (Schuster et al., 2017). Intrinsic motivators, such as a desire for adventure or a need for personal development, can also be crucial factors in wanting to undertake an international assignment (Shaffer et al., 2012). Personality traits may impact whether a person is intrinsically motivated. From that perspective, MNE hiring managers should consider the motivation to work abroad since that can also shed light on the candidate's personality characteristics.

Global mobility is still a developing field for many organizations. In some MNEs, the selection and preparation of expatriates are handled piecemeal (Collings, 2014). In other MNEs, expatriates chosen for overseas assignments are selected by line managers without consideration of the challenges of working abroad (Shaffer et al., 2012). Line managers are directly involved in delivering or producing the MNE's goods and services, so any decision they make in selecting an expatriate often directly impacts their results and budget requirements. However, those line managers, in turn, may have no direct responsibility for implementing the global strategic goals of an MNE when making decisions regarding international assignments (O'Sullivan et al., 2002). In those cases where a hiring decision must be made urgently to fill a position, technical know-how may

carry the most weight in determining who is ultimately selected for the expatriate assignment. While the choice of candidate may still be a good one, that method does not imply a strategic approach for expatriate selection.

In other companies, the HR professional is the hiring manager. For example, in larger MNE operations, managers in the international human resource management (IHRM) section may be tasked with balancing global and local priorities when employing, training, and compensating employees in the company's operations worldwide (Farndale et al., 2014; Valk, 2019). HR professionals may have different variables in selecting candidates for an international assignment. Those variables may even depend on how the HR section is structured in the company.

Functions within an IHRM section may be delineated into various areas of responsibility. The global mobility (GM) function has traditionally been an administrative one focused on compliance, responsible for such areas as payroll reporting, tax remittances, and work visas (Caligiuri, 2013). Larger MNEs fortunate enough to have a global talent management (GTM) function may benefit from enhanced expatriate retention, employer attractiveness, and overall company performance (Anlesinya et al., 2019). GTM managers seek to develop their pool of human capital by putting employees in progressively challenging roles to develop their skills (Caligiuri, 2013). In small and mid-size MNEs, the functions of GM and GTM may be combined into a single unit. Including HR professionals in expatriate selection could help apply a more standard and systematic approach.

Positioning HR as a strategic partner in the long-term expansion plans of an MNE's leadership depends on several factors, such as the company culture, the vision of

the company leaders, and the expertise of the HR professionals. For example, the GTM function could partner with line managers to identify managers currently employed at the MNE they consider most suitable and ready for an international assignment (Caligiuri, 2013). Or once the line managers identify candidates with the needed technical skills, the GM function would ensure that those selected for overseas assignments have the desired knowledge, skills, abilities, and other characteristics (KSAOs) (Caligiuri, 2013). When expatriate management processes are not integrated within HR, the lack of coordinated oversight can hinder the effectiveness of an organization (Collings, 2014). Therefore, the HR section within an MNE could serve a key role in providing oversight for the entire expatriate selection process.

However, positioning HR as a strategic component in expatriate selection assumes that the HR professionals in the MNE have the breadth of experience and detailed knowledge in managing expatriate selection. Even when HR processes for expatriate management are coordinated, the results of one early study by Black and Gregersen (1999) suggested that fewer than 11 percent of HR managers at MNEs have ever worked overseas. That lack of experience limits the credibility of HR as a strategic function within an MNE. If leaders at an MNE do not consider the HR department as a vital unit in expatriate selection, it is unlikely that leaders in the other company departments will.

Even if HR professionals do not have detailed overseas experience, they can still play a crucial role in enhancing expatriate selection in their company. HR professionals can play a vital function in capturing an international assignment's various job-related and non-job-related elements. Developing a realistic job preview would be a first step in

capturing more than the job's technical requirements (Caligiuri et al., 2009). To select expatriates who are the best fit for their overseas positions, an expatriate job description should include both the technical aspects of the position and the job demands from an adaptability and cultural perspective (O'Sullivan et al., 2002). A job description that covers work and non-work aspects of the assignment would assist hiring managers in conducting a more thorough evaluation of the person-job fit (O'Sullivan et al., 2002). The job description is an area in which HR professionals can play a clear leadership role by working with HR colleagues and line managers at subsidiary locations to compile and document the realistic expectations of an international assignment.

Cross-cultural Training

Providing predeparture training that is focused on cross-cultural issues may enhance an expatriate's cultural awareness and address concerns about an international assignment. Cross-cultural training can improve cultural intelligence, adjustment, and job performance (Chenyang, 2021). In addition, cross-cultural training can also help dispel stereotypes of cultural characteristics (Almazrouei & Zacca, 2015). Offering predeparture cultural training is a fundamental and cost-effective approach that MNE leaders should actively support.

How cross-cultural training is presented can make a difference in its effectiveness. D. Wang et al. (2017) suggested that the skills needed to succeed overseas depend on which region of the world the expatriate is working in. Culture-specific training can prepare expatriates for the unique cultural differences they may experience in their international assignments. However, not all training programs must be tailored to a specific culture.

Predeparture training that provides a metalevel understanding of common stages of cultural adjustment can enhance expatriate success. Cross-cultural training can assist persons moving overseas prepare for the multiple phases of adjustment commonly experienced when adapting to a new culture (Hommadova, 2017). Levels of motivation and periods of stress typically vary throughout any expatriate assignment, impacting work adjustment patterns (Firth et al., 2014). Understanding the various stages of transitions one can experience when confronted daily with cultural differences can help set expectations for common challenges that expatriates face and provide insights into how those stages can vary over time.

Company leaders can consider other approaches for offering cross-cultural training to assist expatriates and strengthen their organizations. Post departure cross-cultural training that takes place after arriving in the host country can be equally effective in equipping expatriate managers and their families with the valuable knowledge and skills to assist in adjusting to the challenges of an international assignment (Erogul & Rahman, 2017). In addition, cross-cultural training provided to groups working on global teams enhanced team interactions and management of the cultural challenges they faced in fulfilling the responsibilities of their roles (Presbitero & Toledano, 2018). Synthesizing those two views, it is apparent that cross-cultural training does not need to be limited to just the expatriate leaders before their assignment. Training in different cultures can be applied to families and other company members who must interact across borders. Cross-cultural training can be even more beneficial once the expatriate is relocated to the overseas post since the benefits of the training can be applied to daily interactions.

MNE leaders also should think beyond traditional classroom training and consider training approaches that involve participant interaction. Okpara and Kabongo (2017) posited that cross-cultural training that included role-play and cultural-specific simulations was most effective in helping expatriates prepare for work in a new cultural setting. That experiential approach to cross-cultural training had a more significant impact on enhancing cultural intelligence (Chenyang, 2021). Even though formal predeparture training can be enhanced expatriate adjustment, the time and resources for the training are not always available.

For SME leaders faced with limited budgets, expatriate training may be an extravagance that smaller firms cannot afford (Festing, 2007). In those cases, informal and tacit learning may be a practical and cost-effective approach for companies with limited resources (Festing, 2007). For example, returned expatriates could act as mentors for those about to go overseas. In either case, the leaders of the MNE need to fully communicate the importance of the training so that those about to embark on an international assignment focus on getting the most out of the experience.

Providing guidance and support to expatriates transitioning to working overseas can have an immediate impact on the success of that role. The types of guidance and support may vary. Marcdante and Simpson (2018) noted that there is often a lack of clear understanding of the terms coaching and mentoring. As the authors further suggested, mentoring implies a long-term relationship in which the mentor shares their experiences and wisdom to assist in the growth and development of an individual; coaching, in comparison, assumes that the coach is helping the other individual attain their goals through nondirective questions (Marcdante & Simpson, 2018). Schuster et al. (2017)

noted that expatriates often experience increased stress in transitioning to a new culture and suggested that mentors can assist and facilitate that transition with cultural guidance and support. Salomaa (2015) similarly suggested that expatriates often face increased physical, emotional, and intellectual stress and that coaching relationships, which are shorter in nature and more structured than mentoring relationships, can aid in the transition to a new culture if that coach has prior international experience. Combining these two perspectives, it is clear that providing support and guidance to expatriates can positively impact their adjustment. How that guidance is provided may vary, whether through a coaching or mentoring arrangement or a combination of both. But both approaches fill an essential need for providing support to the expatriate when they may feel cut off from their existing social support network.

Even though cross-cultural training is a critical factor in expatriate adjustment, it is not a panacea for avoiding expatriate failure. The most crucial element in the international assignment process is ultimately expatriate selection. In a study on the effectiveness of cross-cultural training for expatriates, Selmer (2002) suggested that while training helps expatriates adjust more quickly to their new assignments, there was no correlation with how effective those same expatriates were in meeting the goals of their assignment. While predeparture cross-cultural training could be beneficial, it is only one step that organization managers can take in enhancing expatriate success.

Not all employees may benefit equally from cross-cultural training. Managers hiring for expatriate positions would benefit by looking for candidates who exhibit a sense of openness, curiosity about the world, and a willingness to adapt, since it is easier to hire for those attributes than to develop and foster them afterward (Ghemawat &

Vantrappen, 2015). In addition, not all skills can be picked up quickly in a short training course. Thus, MNE hiring managers need to select individuals for expatriate assignments who, in addition to having the necessary technical skills, already have some broad cultural competencies that will aid in adapting to living and working overseas in the new assignment.

Gaps in the Literature

Expatriate selection and preparation are important topics for companies with a global mobility strategy. While previous studies have been undertaken that research the expatriate selection and training process, hiring professionals at MNEs still face the challenge of determining set personal criteria for predicting expatriate success (Caligiuri & Bonache, 2015). Given the deepening globalization of companies faced with a limited talent pool, identifying employees motivated to pursue international careers is crucial (Lazarova et al., 2014). The human capital resources of an MNE are its most vital resource. Global expansion plans are unlikely to succeed without the right people to implement corporate strategy.

The issue of global mobility is not limited to just large corporations. Much of the research on expatriate selection and global mobility has focused on larger MNEs, even though many SMEs are expanding globally (Stoiana et al., 2018; Vanninen et al., 2022). Those small and mid-size MNEs may have a more difficult job assessing staffing abilities because of more limited resources (Behrends, 2007). Festing (2007) suggested that one of the most significant HR challenges faced by SME managers is the internal recruitment of managers for international assignments. Expanding operations overseas can be a costly undertaking for SME leaders. Establishing an overseas subsidiary, transferring

knowledge, and supporting those operations often involves expatriate workers filling those roles, even if only temporarily.

Having capable expatriates available to work overseas requires first identifying those candidates. In their article on talent management in the global arena, Anlesinya et al. (2019) indicated a need for future research that focused on the impact of global talent management procedures on expatriate job satisfaction and voluntary acceptance of international assignments. Many HR processes still rely on a recruitment and selection approach that legitimizes and justifies decisions already made informally (Collings, 2014). Therefore, a need exists for a theoretically sound method to predict expatriate adjustment and performance (Caligiuri & Bonache, 2015). Even an incremental approach to enhancing performance predictability could be helpful to MNE hiring managers responsible for expatriate selection.

Summary

In this section, several key themes that emerged in the literature review were discussed regarding expatriate failure, cultural adjustment, expatriate selection, and cross-cultural training. As Doherty et al. (2011) suggested in an article on expatriate motivation, there is a limited understanding of what factors entice employees to undertake international assignments. A study on that topic could potentially provide a valuable management tool for selecting candidates for overseas positions and hopefully improve organizational performance. Creating a more intentional and structured global mobility process that can be readily applied could lead MNE hiring managers to have more success in expatriate selection. For this study, identifying those key themes is a

critical step. Once identified, those steps can be evaluated through a theoretical lens to acquire new perspectives on the expatriate selection process.

Theoretical Framework

Three theories serve as a theoretical lens for this study. One is the big five personality model (Digman & Inouye, 1986); the second is cultural competence (Johnson et al., 2006); and the third is vital engagement (Nakamura & Csikszentmihalyi, 2004). To understand how MNE hiring managers select expatriates for their international assignments, these theoretical structures could be applied in shaping the research questions on expatriate selection. As a qualitative phenomenological study, this research focuses on evaluating the lived experiences of HR managers in selecting and preparing expatriates for their international assignments.

Big Five Personality Traits

The big five personality traits are the first theoretical model to be examined (Digman & Inouye, 1986). Leveraging the research of earlier studies, those authors suggested that five robust factors almost wholly account for the domain of personality descriptors (Digman & Inouye, 1986). That work was then expanded upon in a study that confirmed the theory's validity and established the big five model, which consists of the following traits: conscientiousness, agreeableness, neuroticism, openness to experience, and extraversion (Piedmont et al., 1991). Researchers have suggested that the big five personality characteristics are stable and relatively immutable (Caligiuri, 2013). The big five model may be applied as a framework for assessing the personality traits of candidates for international assignments.

The ability to adjust to new conditions for working and living overseas can impact expatriate success. In a study on the personality characteristics of effective expatriates, Caligiuri (2000) suggested support for the hypothesis that several big five personality characteristics correlate to expatriate success. In particular, the results of the study indicated that extroversion, agreeableness, and emotional stability negatively correlate with the intention to terminate an assignment. Since premature departure can be viewed as expatriate failure, hiring managers could benefit from identifying expatriate candidates who would be more likely to stay for the duration of their assignment.

Personality characteristics can have an impact on various aspects of the cultural adjustment process. Extroverted individuals are often more effective in learning about the culture; agreeable expatriates are often more able to deal with conflict collaboratively; and emotionally stable expatriates are often more effective in dealing with the stress of living in a new environment (Caligiuri et al., 2009). Those with openness may be more likely to pick up on cultural nuances and social cues, and those with high conscientiousness may be more dependable in their roles (Caligiuri et al., 2009). Hiring managers could benefit from using the framework of the big five model to evaluate personality characteristics as part of the expatriate selection process.

Additional studies on the big five model supported those findings. For example, in a study conducted to examine the effects of the big five personality traits on expatriate adjustment and job performance, Bhatti et al. (2014) suggested that the big five traits could be used to predict expatriate adjustment, which was correlated to expatriate performance. Extroversion, openness, agreeableness, and conscientiousness all had a positive correlation to expatriate adjustment (Bhatti et al., 2014). Low neuroticism, or

high emotional stability, also had a close correlation to how well an expatriate could adjust to a new culture (Bhatti et al., 2014). Using the big five model to assess expatriate candidates can assist in predicting which candidates may be more effective in adapting to an international assignment.

Personality characteristics also could be useful in determining candidates most likely to benefit from training on cultural issues. Predeparture cross-cultural training may be practical only for individuals predisposed to being culturally open (Caligiuri, 2000). An individual lacking cultural competencies may not perceive the need for modifying behavior and thus would be unable to undertake change (Johnson et al., 2006). Therefore, in assessing which knowledge, skills, abilities, and other characteristics (KSAOs) may be lacking in a candidate for an international assignment, hiring professionals may also need to determine how likely new KSAOs could be enhanced through training.

Conversely, while personality characteristics may be useful in predicting expatriate adjustment, those insights may only offer a limited perspective regarding expatriate success. Focusing on those candidates who would be more likely to adjust well in a cross-cultural setting does not predict success in relation to the tasks and roles of the job (Caligiuri et al., 2009). To what extent technical skills would be a high priority for an international assignment, compared with more high-level networking and social skills, is often a factor of the specific job requirements (D. Wang et al., 2017). An international assignment to work as an engineer supporting scientific research may require one set of technical and social skills. In comparison, an expatriate position to serve as a subsidiary's country manager who would likely interact with senior government officials and the public may require a completely different set of technical and social skills. Assessing

personality traits can aid in predicting expatriate success but only when viewed in conjunction with other factors, such as technical and managerial abilities.

Cultural Competence

The second theoretical model to be examined as a criterion for expatriate selection is cultural competence. The cultural competence model is rooted in research originating in international business, workforce diversity, and intercultural competence (Johnson et al., 2006). One succinct definition of cultural competence is the ability to live contentedly and work successfully in another culture (Valk, 2021). Given the adjustments that expatriates may need to make when living and working overseas, assessing cultural competence may be vital for predicting expatriate success.

Other theoretical models also relate to cultural adaptation. For example, cultural intelligence, a concept introduced in the seminal work of Earley and Ang (2003), is the awareness, behavior, and motivation for learning to interact and deal with culturally diverse situations (Jyoti & Kour, 2015; Livermore, 2015). While cultural intelligence is a framework for evaluating an individual's cognitive ability to appreciate cultural differences, cultural competence is a broader concept that includes the application of knowledge, skills, and personal attributes to work successfully in another culture (Johnson et al., 2006; Valk, 2021). Cultural competence may impact how likely an expatriate can develop strong social relationships while working and living in a new culture.

Cultural competence should be evaluated together with other technical and managerial abilities. While previous overseas experience helped predict how quickly one could adjust to living in a new culture, it was not predictive regarding effectiveness in

transferring skills and knowledge (Kealey et al., 2004). In a study on predictors of expatriate adjustment, cultural competencies were identified as valuable evaluation criteria that could complement a separate assessment of an individual's technical and managerial skills (Aycan, 1997). Developing an awareness of cultural differences and expertise in cross-cultural interactions is essential for expatriate productivity and eventual success in an international assignment (Noman et al., 2020). Hiring managers who evaluate cultural competencies in the expatriate selection process still need to take a broad and balanced perspective of the technical job requirements of an assignment.

Given the different academic disciplines that have included research on cultural competence, the construct can be viewed from multiple perspectives. One classification based on prior research included an examination of cultural competence from four facets (Johnson et al., 2006; Kraimer et al., 2016; Valk, 2021). Those facets are the following: one, cultural motivation, such as a natural curiosity to learn about new countries and cultures; two, cultural cognition, such as an understanding of the various culturally norms and values; three, cultural metacognition, which entails an ability to understand cultural cues; and four, cultural behavior, such as acting appropriately in a specific situation (Johnson et al., 2006; Kraimer et al., 2016; Valk, 2021). A common theme across those competencies is the ability to understand the new working and living environment. Social interaction is a common aspect of most jobs, and in the expatriate context, those interactions may require understanding the cultural background of the individuals encountered.

Not all candidates may possess all four facets of the defined cultural competencies. But the most critical cultural competency to identify is the motivation and

natural willingness to learn about new cultures. Research suggests personality traits are relatively stable and immutable (Caligiuri, 2013). On the other hand, cultural competencies can be developed during an international assignment (Neculaesei, 2016). MNE hiring managers could benefit by identifying applicants who are curious about their world and willing to understand and learn about new cultures (Pak et al., 2019). Developing expatriate selection criteria that evaluate a candidate's willingness and motivation to learn about new cultures could enhance predictability in expatriate selection.

Vital Engagement

Hiring managers can use theoretical models to identify a willingness to learn about new cultures that could aid in expatriate selection. The third construct examined in this study is vital engagement, which was proposed by Nakamura and Csikszentmihalyi (2004). This construct entails an examination of personal values and beliefs as well as understanding the activities that bring an individual enjoyment and meaning. A fundamental assumption of vital engagement is that individuals can better understand which activities leverage their innate talents, interests, and motivators by determining the areas that naturally lead to a heightened sense of vital engagement (Nakamura & Csikszentmihalyi, 2004). Likewise, avoiding activities that do not offer that same enjoyment can enhance an individual's sense of fulfillment (Nakamura & Csikszentmihalyi, 2004).

The vital engagement model could serve as a framework for examining the tasks associated with an international assignment. From the perspective of the vital engagement construct, an examination of the activities an individual may undertake in a work

assignment should include the full range of written and unwritten job requirements (Nakamura & Csikszentmihalyi, 2005b). That approach could provide a framework for determining the person-job fit for an expatriate assignment. Building on the earlier concept of flow, which entails a more short-term sense of enjoyable concentration where individuals forget themselves, the construct of vital engagement considers both absorption in a task and a sense of meaning and importance gained from doing that task (Nakamura & Csikszentmihalyi, 2004). Given the relatively long-term nature of most expatriate assignments and the adjustments required for working and living conditions, vital engagement is a construct that captures that broad interpretation of the multifaceted aspects of an expatriate assignment.

How a person perceives their work can determine how much meaning they give to their role. In a study on excelling at work, Murthy (2014) suggested that individuals who are passionate about their work and see it as a calling have a deep sense that their work is meaningful, a perspective that aligns with the critical dimensions of vital engagement (Nakamura, J., & Csikszentmihalyi, 2005b). Employees who gain a sense of personal development and progress because of their work are more likely to find their position meaningful, leading to a more deeply felt intrinsic motivation (Murthy, 2014). Expatriates motivated to learn about new cultures and gain satisfaction from working abroad may find that an international assignment offers them a fulfilling and meaningful experience.

While adapting to an international assignment can be stressful, those who gain a sense of deep meaning and purpose from their role may adapt more quickly to the new work and living environment. In research on expatriate adjustment, Aycan (1997)

suggested that cultural adjustment is the degree of fit between the expatriate and the new environment, resulting in greater effectiveness and reduced stress for the individual. A synthesis of those two perspectives on vital engagement and cultural adjustment implies that those expatriates who feel a deep sense of purpose in the importance of the work may adjust more effectively to their new environment. Selecting the right candidate for an international assignment is one of the most critical issues determining the success or failure of the expatriate (Safi & Saxena, 2020). Identifying candidates who are passionate about an international assignment could be an important criterion in expatriate selection.

Anyone starting a new work assignment can expect to face challenges in their role. The construct of vital engagement involves a balance between the challenges of meeting the requirements of a job and the opportunities for personal development that occur due to job-related growth (Hicks et al., 2014). Attaining an appropriate balance between challenge and success is critical. When there is too little challenge, the employee may feel bored and disinterested, while too much challenge leads to stress and anxiety (Hicks et al., 2014). A proper fit between the person and the job is more likely to result in a feeling of flow and, if connected in a long-term and meaningful way, lead to a sense of vital engagement (Nakamura & Csikszentmihalyi, 2004). Expatriates who overcome the challenges of an international assignment may attain a sense of personal growth and achievement.

Vital engagement involves the concept of using one's competencies and strengths. In a book on analyzing one's strengths, Linley (2008) described a personal strength as a pre-existing capability for generating a sense of energy based on how a person behaves, thinks, and feels. When an individual uses their innate strengths, they are more likely to

feel an inner sense of energy and confidence in applying those abilities (Linley, 2008). That concept of innate abilities could be applied to the expatriate experience of living and working in a foreign setting. For some individuals, an international assignment is a major step in personal development and growth, which could translate into a sense of intrinsic motivation (Doherty et al., 2011). Expatriate candidates intrinsically motivated to work overseas may have a sense of energy and purpose regarding an international assignment.

Individuals who land positions that use their true strengths and talents may experience a better person-job fit. Similar to the construct of vital engagement, the construct of career anchors proposed by Schein (1990) considers the foundations for an individual's self-concept based on talents, abilities, motives, and needs related to one's career. Those anchors can evolve as an individual gains new work-related skills and life experiences (Schein, 1990). The construct of career anchors assumes that work satisfaction and job effectiveness are highest when there is a strong fit between the career anchor and the work environment (Wechtler et al., 2017). Criteria for expatriate selection could include examining how an international assignment fits into long-term career goals.

An interest in living and working abroad can be classified as a distinct career anchor. Extending upon Schein's (1990) career-anchors framework, Suutari and Taka (2004) suggested that internationalism was an additional and distinct career framework centered on interests, preferences, and excitement. In a study on international careers, Lazarova et al. (2014) posited that there was a significant correlation between internationalism as an anchor and a willingness to work overseas. Synthesizing the ideas of personal strengths, career anchors, and vital engagement suggests that hiring managers could utilize a method for enhancing the predictability of expatriate success.

Implementing an expatriate selection process by asking candidates questions that elicit insights into their motivations, strengths, and experiences could benefit hiring managers at MNEs, especially small and mid-size MNEs that lack robust HR resources. Such an approach could more effectively determine if the candidate is the right fit for an international assignment.

Summary

This section described three theoretical frameworks: big five personality traits, cross-cultural competency, and vital engagement. The first two models focused on personality and competencies and are routinely referenced in research regarding expatriate selection and success. The third construct, vital engagement, has not been previously referenced in the field of global mobility and may provide a novel approach to viewing the motivations and characteristics of employees being considered for international assignments. Applying the vital engagement construct from the field of psychology offers insight into how the right assignment can provide a sense of purpose that leaves an individual wholly engaged in activities that lead to a sense of fulfillment (Nakamura & Csikszentmihalyi, 2004). Identifying candidates with the requisite technical skills and competencies that align with the concept of vital engagement may be beneficial for hiring managers at MNEs.

The aim of this research is to examine, through semistructured interviews, the process used in small and mid-size MNEs to select candidates for expatriate leadership roles and predeparture training. Investigating the process that hiring managers at SMEs follow to select and prepare candidates for international assignments will add depth to the existing literature. For this study, understanding the critical concepts articulated in vital

engagement could be useful for evaluating the competencies and motivations of candidates to determine the candidates with the best person-job fit for the proposed international assignment.

The strength of this research is to better understand the motivations and processes related to this phenomenon through the qualitative lens of phenomenology. The next chapter includes an explanation of the qualitative methodology and phenomenological research design employed in this research. A description of the instruments, participants, and data analysis methods is covered in Chapter 3.

CHAPTER 3: METHODOLOGY

The purpose of this qualitative phenomenological study was to explore how hiring professionals understand and apply global mobility criteria for selecting candidates for expatriate assignments and predeparture training. Since qualitative research is meant for exploring, interpreting, and describing complex issues (Creswell & Creswell, 2018), that approach was deemed most appropriate for this study. Studying and understanding lived experiences is an essential aspect of Husserl's philosophical work, which has an emphasis on looking with intentionality to get to the pure essence of the experience (Chan et al., 2013; Peoples, 2021). The focus of this study was to examine this phenomenon from the perspective of the lived experiences of the hiring managers interviewed to make sense of those shared experiences.

Chapter 3 includes a summary of the research method covering the research design, instruments, participants, and data analysis methods for this study. To better understand the phenomenon, the following two research questions were designed to direct the focus of the research:

R.Q. 1 What do hiring professionals consider in selecting candidates for expatriate leadership roles to secure continued engagement and fit?

R.Q. 2 What do hiring professionals consider in training candidates for expatriate leadership roles to secure continued engagement and fit?

The discoveries uncovered could help clarify how SME hiring managers approach global mobility procedures for expatriate selection and predeparture training.

Research Method

The qualitative methodology was selected for researching this study on candidate selection for expatriate assignments and predeparture training. Exploration was undertaken to understand the meaning individuals ascribe to a complex situation. A qualitative methodology included a framework for capturing the various subtleties of the experience that could not be gained through quantitative research (Creswell & Creswell, 2018). Moreover, a quantitative methodology was not considered suitable for this study since the research did not entail testing objective theories through the examination of variables (Creswell & Creswell, 2018). For that same reason, a mixed-methods approach was also not an appropriate choice. An exploration of the experiences of hiring managers from a qualitative perspective was deemed the most suitable approach for this study.

Research undertaken by conducting interviews and analyzing documents to explore a problem to gain context and understanding is an appropriate use of the qualitative methodology (Korstjens & Moser, 2017). Most research on expatriate selection is focused on large multinational enterprises (MNEs) that have relatively robust human resources (HR) policies and teams. Since hiring managers at small and mid-size enterprises (SMEs) may lack those HR resources, the aim of this study was to understand what meaning those professionals ascribe to the experience of expatriation selection.

Research Design

At its core, the fundamental aim of phenomenology is to comprehend the way phenomena emerge as lived in the world (Valentine et al., 2018). A research design is the type of inquiry within a research methodology that provides a structure and specific direction and procedures for examining the data in a study (Creswell & Creswell, 2018).

A phenomenological research design involves conducting in-depth interviews to explore the essence of the shared experiences of individuals (Marshall & Rossman, 2016). Use of a phenomenological research design provided a framework for understanding the lived experience of the hiring managers.

Other approaches to research design were considered for conducting this study. Grounded theory was not selected as that research design is focused on developing and testing a theory to explain a real-world observation rather than the lived experience of individuals (Aspers & Corte, 2019). Likewise, an ethnographical research design was not chosen because the objective of that approach is to explore a social or cultural context (Korstjens & Moser, 2017). Finally, a narrative analysis was not selected as the aim of that research design is to interpret the stories of the participants (Kalu, 2019). The phenomenological research design was determined to be more specific to the issue of what hiring professionals consider in selecting candidates for expatriate leadership roles and predeparture training. As a result, that approach was considered most effective when interviewing those hiring managers to gain a richer and more profound perspective.

This approach also had other benefits. The phenomenological research design was used as a structure for interviewing participants to record, describe, and reflect upon the data they shared concerning their lived experiences (Vagle, 2018). Anecdotal data were collected from those interviews of hiring professionals responsible for expatriate selection to capture the essence of the lived phenomena. An examination of those shared experiences concerning expatriate selection helped identify themes that provided a framework of concepts that hiring managers at organizations could use when undertaking expatriate selection and organizing predeparture training.

Instruments

Qualitative research is dependent on the researcher interviewing and observing participants. The researcher is the instrument of semistructured qualitative interviews (Pezalla et al., 2012). Therefore, it is of utmost importance that the researcher abstains from bias and maintains the credibility, dependability, and transferability of the data (Cope, 2014). The data collection process for this study was through semistructured interviews of participants by creating guiding questions using the theoretical framework.

The target population was hiring professionals with experience working in SMEs and who had the responsibility to select candidates for international assignments. The interviews in this study were centered on learning about MNE procedures for global mobility, particularly the selection and training of expatriate employees. The questions asked in this study were based on several key themes, including the selection process, personal and cultural skills, motivation, and predeparture training,

Initial communication with the participants was conducted via email or social media messaging. The interviews were conducted using the Zoom videoconferencing platform. The data regarding those lived experiences were collected through individually administered, semistructured interviews consisting of open-ended questions (See Appendix A). Questions raised included how the non-technical requirements of an overseas assignment are evaluated, how candidates are selected and screened for international positions, and what procedures are used to track the success or failure of an expatriate assignment. With permission, the recorded interviews were transcribed using the Otter.ai application, and handwritten notes were taken to ensure the nuances of tone and content were recorded accurately.

Participants

The population for this study was hiring managers who select employees for expatriate assignments and have experience at small and mid-size MNEs. The target sample size within that population was five to 25 participants. A criterion-based sampling technique was used to ensure participants met predefined criteria regarding their role in the expatriate selection process. That sampling technique helped identify participants who have shared an experience but whose responses varied in terms of particular circumstances and characteristics (Korstjens & Moser, 2017). In addition, snowball sampling was applied to identify additional participants by asking those interviewed if they could refer other hiring managers who met the selection criteria for the study (Peoples, 2021). Using that combination of approaches provided a method for selecting a targeted population.

Views on the most appropriate sample size for a study vary and depend on multiple variables. There are no set rules on sample size in qualitative research as the inquiry depends on such factors as the purpose of the study, what will be helpful to know, and whether it is beneficial (Patton, 2015). Vagle (2018) also noted that there was no single answer to the appropriate sample size. Creswell and Poth (2018) referenced prior texts on this topic of appropriate population size, with the number of recommended participants ranging from one to 325. Creswell and Creswell (2018) suggested that a phenomenology research population typically ranges from three to ten individuals. Finally, Peoples (2021) concluded that the range of participants needed for a study using a phenomenological research design was usually between eight to 15 participants, based on which source was referenced and mainly depended on what was considered the

appropriate size needed to achieve data saturation. The objective of this study was to interview a population of participants who had shared a lived experience that varied based on each person's situation and characteristics.

This study was focused on working with a population of participants that was sufficient to generate data from various perspectives. That potentially small sample size, however, could mean that the study of this population is not representative since it does not allow for statistical generalizations (Patton, 2015). In sum, a variety of perspectives from a small sample size does not ensure all possible views were captured.

On the other hand, studies based on small populations have other advantages that may not be readily apparent. While reaching full data saturation in one round of interviews is unlikely, data saturation can be achieved when there is enough information on the shared experience to replicate the study and no additional coding is feasible (Fusch & Ness, 2015). Capturing more data than needed on the lived experience is not necessarily better (Fusch & Ness, 2015). Limiting the sample size in a study can be beneficial if the researcher can then spend quality time with each participant to gather valuable and insightful data (Vagle, 2018). The methodology selected and the population targeted in this study, while relatively small and focused on one primary group of stakeholders, generated a variety of perspectives that provided a diverse range of experiences and a more profound understanding of the phenomenon.

The initial criteria for identifying the small and mid-size MNEs were based on three factors: the company needed to be headquartered in the United States, the business needed to have company employees producing goods or delivering services at a company-owned facility in more than one country, and the business needed to meet the

classification requirement for an SME in that the company generated annual revenue of less than \$1 billion. Participants at those qualifying SMEs needed to have had experience in the selection process for assigning two or more employees outside their home country for an assignment of at least one year. Those participants also had to have current or prior experience for at least six months working in that role of expatriate selection. This study was not focused on the nationality of the expatriates, only on the hiring managers' experience in selecting expatriate candidates for international assignments.

The preliminary criteria for identifying participants were considered overly restrictive based on the paucity of responses from participants in early outreach efforts. The original approach for recruiting participants was to send email requests to hiring managers at MNEs with representation in associations focused on expatriate management, global mobility, and mid-size businesses. The Society for Human Resources Management (SHRM), which periodically publishes research on expatriate management, was one such association. Another targeted association was Ohio State University's National Center for the Middle Market (NCMM) which conducts innovative research on the middle market economy. In response to an inquiry on contacting organizational members, the SHRM representative replied that their organization does not share member information, and the NCMM representative responded that their organization does not maintain a database of mid-size companies.

However, some SHRM municipal and state-level chapters have LinkedIn professional groups. Thus, approaching those groups via social media was another method for identifying participants. After gaining approval from the Institutional Review Board (IRB) director to reach out to LinkedIn groups for recruitment if the LinkedIn

group owner or administrative gave permission, recruitment focused on those groups. Other LinkedIn groups contacted for this study included those focusing on mobility, talent acquisition, and expatriates. But the response rates from those groups were also very low. In most instances, the group owner did not respond to the request to reach out to their members, so no further action was taken. In the few cases when LinkedIn group owners gave permission and a recruitment letter was posted, no responses of interest were generated.

Given the poor results from the social media approach, the next step was to focus on friends and family of the researcher who might know of someone meeting the criteria to participate in the study. The first few responses from that approach suggested that the initial criteria for research participation were too restrictive. A second request submitted to the IRB director was also approved that permitted changing the research criteria to the following: individuals with at least six months of experience selecting employees for international assignments of at least one year; individuals who have experience working for a company in the United States; individuals who have experience working for a company with operations in more than one country; and those who have experience working at a mid-size or smaller company that generated less than \$1 billion in annual revenue. The revised questions acknowledged that some individuals contacted to participate in the study were not currently working at an SME; however, they did have previous SME work experience. In addition, the company referenced in the study only had to have operations in the United States, even if it was not headquartered there. As a result of those modifications, each participant could agree to all the requirements in the dissertation informed consent form. Included in the informed consent form were

explanations regarding the risks or benefits that could occur, the confidentiality of the participants, and the right to withdraw from the study at any time.

From the number of targeted invitations sent out, six participants who met the criteria for this research agreed to participate in the study. Those six participants included four men and two women. The composition of the participants had two executives with C-suite level experience, one in line management, and three in HR. Four participants were contacted through friends and family, while the other two were approached through the snowball approach of asking the initial participants for referrals. Each interview lasted up to one hour and covered a range of experiences. The questions raised covered various experiences and topics about the selection process: identification of cultural skills and personality traits, understanding candidate motivations, and describing leadership's role in the expatriate selection process. Follow-up interviews were conducted after compiling and analyzing the interview results to gain additional clarification on comments made.

Qualitative studies can use a relatively small sample size to reach saturation, especially if the research is focused on narrowly defined objectives of a relatively homogenous population (Hennink & Kaiser, 2022). In this case, the target population was a single category of stakeholders. Sample size sufficiency is contingent on a range of factors, such as the scope of the study, the nature of the topic, and the quality of the data (Vasileiou et al., 2018). In addition, it can be beneficial not to have too many participants in a study if there is an advantage in spending quality time with each participant to gather data of value (Vagle, 2018). The aim of setting a sample size is to find balance by identifying a population large enough to provide a new and fuller understanding of the

phenomenon under study while also small enough to give a deep analysis of the individual cases (Vasileiou et al., 2018). In this study, the six participants interviewed provided an in-depth yet varied perspective from executives with experience in HR, line management, and at the C-suite level on the process used by hiring managers to select and prepare candidates for international assignments.

Data Analysis Methods

The qualitative research data during semistructured interview sessions were gathered using the Zoom videoconferencing platform to record the interviews. The Otter.ai recording application was used to transcribe those conversations. The data were collected by asking progressively more targeted questions based on the themes that emerged (Patten & Newhart, 2017). The commonalities and differences between those shared experiences were studied and evaluated against the literature (Vagle, 2018). This approach resulted in identifying noteworthy and meaningful statements described in more detail in Chapter 4.

Once those recordings were transcribed, the relevant information, actions, insights, and activities were labeled as part of the coding process (Lofgren, 2013). The patterns and clusters were first coded and then organized into themes and conceptual categories to coherently interpret the information collected from the interviews (Marshall & Rossman, 2016). A vital aspect of that process was determining the strategy and choices for organizing the data to understand how those concepts were applied to specific themes (Lofgren, 2013). The data were collected based on the transcription and saved using the Microsoft Word application. The data have been stored on a separate external

USB drive that is password-protected, encrypted, and kept in a locked place. The data will be destroyed after five years of completing the research.

An essential aspect of data collection is to analyze the raw data to identify major emergent themes. Vagle (2018) discussed the benefits of not being limited to only one approach when undertaking phenomenological research. After collecting the raw data from interviews, meaningful and noteworthy statements were amplified and highlighted in the findings described in Chapter 4. At the same time, when there was a convergence of themes across several interviews that provided deep and rich insights, those themes were highlighted (Vagle, 2018). Each interview was examined in its entirety to gain insights into the text's significance (Vagle, 2018). A line-by-line analysis was also conducted to identify and group the most meaningful statements (Vagle, 2018). By taking that flexible approach, this research may contribute to a deeper understanding of the most crucial aspects of what hiring managers consider in expatriate selection.

Trustworthiness

Trustworthiness hinges upon findings based on participant responses rather than the researcher's bias. Trustworthiness refers to the degree of confidence in data, interpretation, and methods used to ensure the quality of a study (Connelly, 2016). A factor impacting trustworthiness is the extent to which the study is accurately based on the resulting perspectives generated by the participants, readers of the study, and the researcher (Creswell & Creswell, 2018). In their seminal study, Lincoln & Guba (1985) proposed four general criteria to evaluate the trustworthiness of qualitative research: credibility, transferability, dependability, and confirmability. To meet those criteria, a list of guiding questions was created for initiating discussions with the participants, while

sufficient time was allocated to conduct the interviews. The questions were developed for transferability so that they were effectively applied in the different organizational settings of each participant. Taking those steps helped ensure the analysis from this research was consistent and replicable in other settings.

Limitations

Limitations of the semistructured interviews conducted in this study depended on how willing the participants were to share their insights openly and honestly during the interview. The participants appeared to have been candid in providing their responses, knowing that their personal and company details would remain confidential. While the study was designed to be transferable and trustworthy, some results may be specific to the participants interviewed. Although this study was focused on criteria for enhancing the predictability of expatriate success, issues regarding the technical role of those expatriates, host-country national concerns, or the repatriation back to the home country were outside the scope of this study.

Delimitations

The delimitations of this study included the deliberate selection of only managers of U.S. companies in the target population. The sample consisted of participants with executive experience in the C-suite, HR, and line management. While the intention of this study has been to generalize the results to a broader population, given the small sample size, the findings and results of this research may not necessarily generalize to other subjects, locations, or future time periods (Tipton et al., 2017). Given the focus of this research on one primary group of stakeholders, the findings and results of the study do not apply to other populations or settings.

Summary

This chapter consisted of a thorough explanation of the qualitative methodology applied in this study. A phenomenological research design was considered appropriate among other approaches for understanding hiring managers' global mobility considerations when selecting expatriates for their assignments. The semistructured interviews provided a structure for capturing the participants' shared experiences. By applying this methodology and research design, meanings in the data that were generated have provided a framework for understanding the lived experiences.

Chapter 4 presents the data on these lived experiences as shared by the hiring managers. Included in that chapter are highlights of key concepts and ideas that emerged from the participant descriptions of their experiences in global mobility for selecting candidates for international assignments and predeparture training. The interview data collected, coded, and analyzed were organized around the significant themes that resulted from participant responses to the interview questions. By following accepted qualitative validity practices, credibility and validity have been reinforced.

CHAPTER 4: FINDINGS

The purpose of this study was to explore the lived experiences of multinational enterprise (MNE) hiring professionals to better understand the criteria used to select candidates for expatriate assignments and predeparture training. That issue was studied to address the stated problem that many MNE leaders do not have defined specifications for enhancing expatriate success predictability. The problem is even more acute for leaders of MNEs categorized as small and mid-size enterprises (SMEs). Those SME operations may lack a pool of skilled human resources (HR) professionals with experience in expatriate selection. Employees with a background that has exposed them to other cultures or who possess particular traits, such as an openness to new experiences, might be better prepared to work overseas in a new culture (D. Wang et al., 2017). In addition, screening a candidate's motivations for pursuing an expatriate position could help detect factors that might hinder success in an international assignment (Cerdin & Le Pargneux, 2009). Combining these perspectives on traits and motivations for effective expatriate selection could be beneficial for SME hiring professionals to predict how effective a candidate may be in adjusting to an international assignment.

Leaders at MNEs depend on having the right people with the needed skillset and experience to execute the company's international strategy. Company-assigned expatriate managers usually encounter a more significant number of difficult situations while living and working overseas (Paik et al., 2017; Selmer & Luring, 2015). Selecting expatriates for continued engagement and fit in their assignments can be vital to the overall success of a strategic plan implemented by MNE leadership.

The focus of this research was centered on the issue of selecting and preparing candidates for expatriate assignments. The research questions and the subsequent findings may provide more structured and strategic approaches to choosing candidates at small and mid-size MNEs for international assignments based on competencies demonstrating vital engagement. Two research questions were developed to study the phenomenon of selecting employees for international assignments and predeparture training:

R.Q. 1 What do hiring professionals consider in selecting candidates for expatriate leadership roles to secure continued engagement and fit?

R.Q. 2 What do hiring professionals consider in training candidates for expatriate leadership roles to secure continued engagement and fit?

Described in Chapter 4 are the findings of the lived experiences of the six participants as expressed during the semistructured interviews. The themes and conceptual categories that emerged from analyzing those lived experiences as they relate to the selection and predeparture training of expatriates are discussed at length. Each of the participants was assigned a participant code to protect their confidentiality. The data derived from the participant interviews were transcribed and recorded using their assigned code.

The six participants had a range of work experiences in various industries. Participant A was a vice president of sales in the high-tech sector, while Participant B was a vice president of HR for a financial services company. Other participants with a background in HR included Participant C, who was an HR director at a consumer goods company; Participant D, who was a C-level executive responsible for HR at a

manufacturer of consumer products; and Participant E, who was the head of an HR division for a high-tech company. Participant F was a C-suite executive in the manufacturing sector. The participants included two women and four men representing a mix of HR, line management, and C-level positions.

Chapter 4 is organized around the following themes: selection, training, assignments, and leadership. Those four themes, generated from an analysis of the interviews, were further broken down into conceptual categories and subcategories. The findings generated from the data analysis provided evidence that supported the research questions. The responses from the participants suggested possible ways hiring managers can ensure continued engagement and fit when selecting and training candidates for expatriate leadership roles.

Presentation of Findings

Once interviews were completed, the data were transcribed, reviewed, coded, and categorized to identify the main themes. Analyzing the raw data was essential for making sense of the data before drafting the final narrative. The coding process involved a careful review of unique codes which emerged from that analysis.

Table 1 shows a summary of the main themes that emerged from the data with their corresponding conceptual categories and subcategories. Those themes were defined based on the shared experiences of the participants interviewed. The themes are not specifically aligned with the research questions as the data generated from the experiences crossed multiple issues.

The term selection refers to the process of deciding which candidate to send on the expatriate assignment. The category of factors to consider has three subcategories.

One subcategory is the candidate's knowledge, skills, abilities, and other characteristics (KSAOs) that could be applied in the expatriate assignment. The other two subcategories are the motivation for wanting to undertake an overseas assignment and the family situation or personal issues that the candidates may be experiencing, as those considerations could impact the decision to accept an assignment overseas. These factors were assessed by the hiring managers through observation and interviews with the candidates.

Training refers to the cross-cultural training and relocation guidance involved in moving and working overseas as part of an expatriate assignment. In some cases, the training is structured and includes region-specific details about working and living in a new culture, practical information about moving overseas, and the daily routines of living in a new culture. In other instances, the training is a formal hands-on arrangement organized by company leadership before the expatriate's departure so that the manager can participate in meetings with the overseas team. The incoming expatriate may even shadow the leader currently in the expatriate role to see how they manage the overseas operation.

In other cases, the training is informal and may even depend on the newly assigned expatriate taking the initiative to travel to the overseas location and experience firsthand the living and work conditions. Or the training could be an informal arrangement focused on employee development, consisting of working with mentors and career coaches. Those advisors could assist and guide the expatriate both before and during their overseas assignment.

The assignments refer to the expatriate position and the strategic objectives that company leaders have arranged for that overseas role. The strategic objectives fall into one of three categories. The first category is the need for an expatriate with unique skills and experiences to be applied in the overseas position. The second category is talent development, which entails enhancing the international experiences and skillset of an expatriate being groomed for future leadership positions within the MNE. The third category is organizational control which encompasses the need to have an experienced expatriate assist in getting an overseas operation up and running so that it adheres to the standards of the parent MNE operation.

The theme of leadership is focused on the role that MNE leaders have in certain positions to set strategic direction and make decisions that impact those corporate strategies. Senior leadership refers to the C-suite of a company, including such positions as Chief Executive Officer, Chief Operating Officer, and Chief Human Resources Officer. In the case of a Chief HR Officer, that job is considered both a senior leader role and an HR executive position.

The open-ended questions (Appendix A) served as a guide in structuring the interviews. Not all of the prepared questions during each interview were asked since often the participant had addressed the issue in response to an earlier question. In addition, sometimes follow-up questions were asked for clarification.

Table 1*Themes and Conceptual Categories*

Themes	Conceptual Categories	Conceptual Subcategories
Selection	Factors to Consider	KSAOs Motivation Family Situation
	Ways to Assess	Observation Interviews
Training	Structured	Region Specific Practical Details Hands-On
	Informal	Travel Employee Development
Assignments	Strategic Objectives	Skillset Requirement Talent Development Organization Control
Leadership	Senior Leadership	--
	HR	--

Selection

Implementing the strategic plans of an MNE requires having employees in those overseas locations with the right skill set, experience, and ability to execute those goals. In selecting employees for international assignments for continued engagement and fit, hiring professionals need to consider several factors. Each participant discussed the specific knowledge, skills, abilities, and other characteristics (KSAOs) they seek in an expatriate candidate. Those participants also discussed evaluating a person's motivation for working overseas as well as eliciting insights into the candidate's family situation and personal circumstances. Sending an employee and often their family on an overseas assignment can be costly. If the company sends over an employee who departs prematurely or is ineffective in their role, the company leaders may have to address

challenges ranging from damaged work relationships to financial loss (Caligiuri & Bonache, 2015; Davis et al., 2018). Given the potential drawbacks of making the wrong choice, hiring managers at MNEs would benefit from establishing criteria to enhance how they select candidates who are more likely to be a good fit for those expatriate positions.

Factors to Consider

Hiring professionals need to consider multiple factors when selecting candidates for expatriate leadership roles who are most likely to achieve continued engagement and fit. In one instance, the participant described how their SME followed clearly defined criteria for evaluating employees, which included potential expatriates. In other cases, the participants described how they used their experience as leaders to assess candidates and make a judgment. Each participant commented on three factors they consider as part of that process: competencies, motivation, and family situation.

KSAOs

The first sub-category regarding KSAOs generated input from the participants by asking them the question: How do you determine the non-technical requirements of an overseas assignment? Participant C discussed having a “fit criteria” their company used based on competencies developed by an outside management company. Those criteria applied to all positions, domestic and international. They explained:

We've aligned those competencies with our global leadership team...We have found that people with these defined behaviors or competencies are more likely to succeed over time.... If people aren't open to learning, they're less likely to be a fit for us as well. Especially going on an international assignment, even just from a cultural perspective, having both self-awareness and nimble learning is essential.

So even within those criteria, self-awareness and the ability to learn quickly were two significant traits to evaluate for expatriation selection.

Participant A had worked as a senior executive in a line management role. They commented on the specific traits they thought would best aid an individual working in an expatriate assignment:

It's the ability for the individual to be flexible, to have an open mind... There has to be knowledge of the local market, the local country, or the local region in some way. Do they understand the culture? Do they speak the language? Where did they grow up? What is their background? The people who have more experiences and broader experiences are typically the ones that are a little bit more successful in those roles because they have a better ability to adapt to the unknown.

Concerning the KSAOs, they included their skills, prior experiences, and traits as essential considerations, signifying that it was a mix of factors that could enhance success working overseas.

Participant D, who had experience in the C-Suite and in HR, had this comment about the balance of competencies needed to represent a company in another country:

They had to be empathetic. They need to have the sensory ability to take in what their environment is teaching them about the culture and practices in the new environment. And then they have to be adaptable. They have to be able to accept some of the local cultural norms and conventions, but not to completely drop their own cultural norms. They need to be able to work in both worlds, and to be seen and respected as someone who understands the need to align with a local culture, to the degree that it doesn't contradict the ethical values of the company or the person.

As Participant D noted, a suitable candidate needs to be able to adapt to new cultural standards while still understanding when specific behaviors should be followed to adhere to a corporate-wide standard. That perspective supports the idea of cultural minimization and the need to ignore cultural norms to ensure adherence to a specific standard (Caligiuri, 2013). Knowing when not to follow the host country's cultural norms is

another aspect of evaluating a candidate for the right fit and continued engagement in an expatriate position.

Participant E talked about the characteristics that helped identify candidates more adaptable to working overseas. They reflected:

I think it has to be somebody who understands that their life will be turned upside down. There's got to be that adventure-seeker gene if you will. You're going to a new country; you're going to a new culture, and you're having to deal with moving all your stuff, which never goes as seamlessly as anybody would like. There are always hiccups. So if they're uncomfortable with change, not comfortable being outside their comfort zone, or are a little bit high maintenance, I would say this probably isn't a good idea for you...[it's] about whether a person has the DNA for an international assignment.

Their comment on the DNA for working overseas suggests that some people may be more effective in adapting to an international environment.

Participant F commented on their role in the expatriate selection process based on prior experience in the C-Suite and line management. They began the expatriate selection process by reaching out to people they knew well in an approach they referred to as nepotistic. They explained:

I looked for people I already knew, who I trusted, and who I felt had the skill set and the personality to be able to work in a non-US situation. And I was looking for people who had demonstrated proficiency. And I'll use product management as an example; someone that knew how to bring a product to market and had been innovative. Was someone comfortable with other people and was I comfortable working with him? Someone who didn't have a big ego and was willing to teach people because the company in Thailand needed to be brought up to a different level. That company was almost a brand-new piece of playdough that needed to be molded. So I was looking for people I trusted that I knew had the skill set, and who could go in, help bring that team up, and grow that business. So trust was probably one of the top requirements I looked for...

While they placed utmost importance on trust, Participant F also formed their perspective based on whether the candidate had demonstrated proficiency in their work. Since the

focus of the business was also on building up a new corporate culture, Participant F also noted the need for a willingness to teach others, an example of knowledge transfer.

Asking participants about instances when they sent someone overseas who they did not think was the right fit for the assignment surprisingly did not elicit detailed responses regarding KSAOs. After a pause, Participant B recounted their experience with a candidate not selected, of whom they said: "...they weren't the right fit because their style was very authoritarian." Participant F's voice dropped when they recalled how one expatriate could have been more successful if they had been: "...not so focused on enjoying the expat life versus trying to really grow the business." Participant E's voice likewise grew softer when they replied to that question: "...it gets complicated when you start getting into termination practices in foreign countries...it's not fun." The general tone of their comments indicates that dealing with expatriates who are the wrong fit for an overseas assignment is challenging for company leaders regarding the administrative aspects of the repatriation process and the personal cost of that mismatch.

Motivation

Evaluating a person's motivation was another vital factor that participants looked for in selecting candidates for international assignments and training. While moving overseas may sound exciting, the preparation time, disruption to one's life, and the need to adjust to a new living and working environment without a regular support network at hand could be difficult. The participants were each asked how they determined a candidate's motivation to work overseas. Participant D explained:

The act of accepting an expat assignment is by itself a test of their motivation. Moving to another country means disruption to their life, and if they have kids, to their kids' education and friendships. Their spouse may not be able to find work right away or at all... So you asked about how we assess the right fit? A lot of it's about

how motivated they are to do their own self-study. When you go into an expat assignment, you're leading yourself. You're typically in a role where you don't have the same support mechanisms around you that you did in your home country. You have some, but it's not the same...

Participant D's comment emphasized the importance of everyone on a team accepting their role as a leader. That self-motivation, or engagement, in preparing to move overseas can be a crucial driver in overcoming the inevitable challenges of working and living in a new country.

The motivation to take an overseas assignment may be a result of experience working or living overseas previously or through interactions with others who have had those experiences. Participant A described how their motivation for working abroad was because they had good mentors who had overseas experience. Those senior manager mentors shared their overseas experiences, which, as the participant commented, sparked an interest in working overseas. Talking about their mentors, they stated:

I wouldn't have gone overseas unless I had had good mentors who had some of those experiences with other cultures. Their conversations with me exposed me to different aspects of the world and business. It is significant to have a leader or mentor who has gone through some of these things and who can guide you or push you towards a position where you have an opportunity at an overseas assignment.

Those conversations gave them a vision of what they wanted to do and to pursue those goals.

Participant C discussed how their company decided which candidates would eventually be assigned overseas. They shared:

What I think we do differently from others is that we don't nominate a successor more than six months out because the person has to earn the role. We're a meritocracy, a very strong meritocracy...So we might say we have a North American supply chain leadership role. You are all welcome to be considered for the VP role because there is retiring on a specific date - we're very transparent. And here's what's needed in order for you to be considered for that role. How can we help you get there?

That process provided a clear and transparent method that employees could use to develop themselves in preparing to work as an expatriate.

Family Situation

Other factors may influence an expatriate's willingness to go overseas and, just as importantly, to remain there. When asked about times when they had a candidate who was not a good fit for an international assignment, Participant C stressed the high importance they placed on understanding a candidate's personal circumstances. They recounted:

There was one person who was going through a divorce, and he had two younger sons. So it wasn't the right time for him to leave. And there was somebody else who wanted to take an international position, but their mother was in very poor health, so it was a long return trip. [That person] just didn't want to be away that long. It also depends on their partner too, and whether the partner is uncertain. So we involve the partners too. If they have family members, we involve them very early on. If there's uncertainty, we push pause and work through all of those realities.

They further noted: "We tend to be very careful with details because if the details aren't taken care of, then the spouse will raise their hand and say send me back." Issues dealing with family or partners that a candidate needs to address can impact their desire to go abroad, and, just as significantly, to remain there.

When asked about the process they had experienced in selecting candidates for expatriate assignments, Participant F also saw the importance of factoring in family needs. They elaborated:

Then there was the whole family issue because you're moving, not only yourself but your family. What happens is whoever's taking the job goes, they go into the office on day one. Then their family is sitting there on day one in a new country, in a new house, and with a new foreign language. And you have to make sure they're comfortable being able to deal with that. And so you're just not hiring the person. You're moving the family. And so I talked to the families and walked through what it would be like.

Acknowledging those family issues up front before going overseas was an essential step in ensuring continued engagement for the duration of the international assignment.

Ways to Assess

The responses in this category were generated by asking the participants to describe the process in their company for selecting candidates for international assignments. Knowing what factors to consider for evaluation if a candidate is the right fit for an assessment is the first step in the process. The second step is to have a method for assessing those factors. The candidates described a mix of two procedures involving observations and asking questions during formal interviews and less structured settings.

Observation

Participant C provided more insights into their company's assessment process for employee development and competency attainment. The specific competencies applied to all positions within the company and involved ongoing observations in determining an employee's capabilities. They clarified:

Our job descriptions will describe what that behavior is when demonstrated as fully competent. We will sit down with the employee and say, 'You're demonstrating this behavior, as it's written in the job description for the role you want to be considered for. Here are the behaviors that you've demonstrated so far.' And we'll give specific observable behaviors on when it happened and when it didn't.

Providing examples of the behavior occurring or not occurring makes the process more transparent. Observing what behaviors the employee used in previous roles can be a critical factor in determining whether a candidate is ready for the challenges of an international assignment.

Participant F, on the other hand, did not have a specific list of competencies they were measuring. Their observations were based on interactions over an extended time working with the candidates they were considering. They reflected:

So there was no actual checklist, but some of it that was in my head. It was the capability of what they were able to do. It was their leadership to be comfortable in training people and helping people come along their path. And then they had to be able to live somewhere else. And then their family being comfortable to live somewhere else and making sure that all of that is pretty clear to them going in so that when they get off the plane, they know what to expect. And you never get what you expect

For Participant F, the mix of observations and follow-up questions with the candidates assured them whether they were suitable for the position.

Participant A was an executive in a line management position while working overseas. They commented on one approach they had for gaining insight into how flexible a candidate was, an attribute they considered necessary for working overseas. In this case, they explained how they and their spouse would meet socially with colleagues at their company who wanted to learn more about working as an expatriate. They reflected:

Often, we would end up going to dinner with them. But then you realize that they're very particular about certain things, such as how things are served, or what's in the food. Or they complain about the service; they complain about this and that. When I see that, I think they're going to have a tough time living in another country when there's no ice in the water. They're going to have a tough time adapting. And it's not that they won't make it or that they can't get through that. But some people are set in their ways, and they're very comfortable.

Participant A used the opportunity to observe individuals in one environment, going out for dinner, to acquire insight into adaptable they might be in adjusting to a new environment. They also acknowledged that while people may not be flexible in moving

overseas, it did not mean they would never adapt, but that the process may be more difficult for that person.

Participant D said selecting a candidate for a domestic assignment by evaluating characteristics and skills was essentially the same process as choosing a person for an international position. Their emphasis was on the overall process, as they explained earlier that they sought certain traits when identifying candidates for expatriate assignments. They elaborated:

...the process we went through to select people for an expat assignment is essentially no different than the process we went through to select anyone for any assignment. What's the role? What are the competencies? What are the values and the principles? How do we assess whether or not the person behaviorally can demonstrate the necessary competencies and motivation? And then making sure that we've identified the right ones? It's the same for hiring an accountant or a country manager in China.

Participant D noted that they were assessing behavior through observation and looking at a mix of competencies, values, and motivation that would help determine the fit for the candidate and the position.

Interviews

Arranging interviews with expatriate candidates was a measure used by several of the participants. Having multiple people conduct individual interviews with candidates provided a broader and more detailed evaluation of the candidate. Asking questions of the person under consideration also allowed them to understand their motivation. Participant B, who managed the HR section at their company, reflected:

I met with the employee, our VP met with her, her director met with her, the general manager met with her, then the manager of the overseas office met with her.... In the interview, I always say here are the pluses, and here are the minuses. When I say minuses, it means you won't always be able to fly back home and see your family. You can't just leave on a whim and go home for the weekend. You

won't have the support of people around you. You're going to have to develop trust, you know.

A key element of Participant A's interview questions was to stress the challenges of being overseas to measure the candidate's commitment and motivation.

Participant D's response was similar to that of Participant B. They also did not gloss over the challenges people would face working overseas. They purposely focused on the difficulties. They recounted:

When I have advised people about working in another country, I try to talk them out of it. I tell them what life is really going to be like. You'll go to a restaurant, and you won't know anything on the menu. You may not even be able to speak the language until you learn a little bit of it. You're not going to have all the comforts that you have in your current life. Are you willing to do that?

Participant D also raised the challenges of getting a favorable onward position at the end of the expatriate assignment as part of the repatriation process. They said:

[Another challenge is] not being able to find an assignment when their expat term is over. Because we don't guarantee that there's a place for you when you get back. We try very hard to find a good position, but it may not be something attractive to the former expat...One typical result is that the scope of the role is smaller. And that person, even though they knew it was a possibility, when reality hits, they end up being disappointed and continue to push for a different role. They want something bigger, even though we couldn't create something out of nothing. And so they sometimes decide to leave the company.

While the idea of working overseas may sound exciting, Participant D stressed the challenges that such a move involved. Setting those expectations out front tested a candidate's commitment and motivation.

Participant A asked questions to explore a person's goals and perspectives which could help determine their fit for the role. They explained:

You just need to just ask. A lot of times people don't know what they don't know.... You don't know until you get into that situation. So you can ask what they want to accomplish long term. You'll find people that are more exploratory in their life, and you'll find some that are uncomfortable with change. And if you

see some of those signs, maybe they're not the best fit for it. Or maybe they want to do something else with their life. And that's okay. People have different paths.

Participant A acknowledged that working overseas often involved change and hence would be more attractive to those open to change and new experiences.

Even though Participant F acknowledged that they first reached out to people they trusted and knew when selecting people for expatriate positions, they also conducted follow-up interviews. Their company was smaller and was in the process of establishing a new overseas operation. They did not sugarcoat the challenges of moving abroad when talking to candidates. As noted previously, they also made sure to meet with and interview the candidate and the candidate's family. They reflected:

You're moving the family. And so I talked to the families and walked through what it would be like. My [spouse] and I, we both did that. We talked things through and met with them and had dinner and talked about what this was going to be like and if they have kids what it's going to be like, and we wanted to make sure that they knew what they were getting into going in. Right? You didn't want buyer's remorse because you're moving overseas...

Participant F's approach provided an opportunity to share those perspectives, set expectations, and gauge the reaction of the entire family that would be impacted.

Training and Preparation

Selecting employees for training to enhance their skills was a topic discussed with each of the participants. Each participant was asked to describe the procedure used in their company to organize training for an employee about to be sent on an expatriate assignment. Several participants noted that training and preparation helped enhance a person's awareness of what to expect when moving overseas. Some of the training referenced was predeparture focused, while others also spoke of post departure or ongoing training. The training programs the participants experienced were either

structured training sessions organized by the company or a third-party contractor, or more informal approaches to help prepare the employees for their overseas roles by providing them with insights into the new culture and work environment.

Structured

Two participants commented on the benefits of the classroom training sessions they had personally attended. Given their positive experience, they recommended that approach for expatriates before departure. Those classroom training courses focused more on cultural and daily living issues. In addition to the classroom training, some participants mentioned the benefits of providing a checklist of items to undertake for the overseas move. One participant described the hands-on program they arranged.

Region Specific

Participant E noted the need to tailor the training based on the assignment location. They said:

...it depends on the country you're talking about. If you're sending someone to parts of South America ...to where there are a lot of kidnapping threats, then your senior executives will be accompanied by security everywhere they go. So, it depends on the country. So, you know if there's a safety issue, it's a whole different kettle of fish.... If you're going to a westernized country, like Europe or Australia, it's less complicated. But even if you're going to Shanghai, there are certain things that you need to know... you'll usually hire or transfer somebody who is already language proficient.

In that case, the destination for the expatriate assignment was a vital driver of the type of training offered. Security concerns, language challenges, and cultural differences were all useful aspects of the training program.

Participant B described how the classroom cultural training they arranged was not just for the employee being assigned overseas but also for HQ staff who would interact with that overseas office. They reflected:

The trainer told us what was considered respectful and not respectful – hand gestures, facial movements, and words. What living is like, so it was like every aspect of a person's life inside and outside the workplace because you had to understand it. It wasn't just this is how they do business. The trainer wasn't a businessperson. They were only focused on helping people transition to a country... We didn't want to offend people in their countries. We all went through it, me, the VP of Finance, the general manager, and the person we were sending over.

In that case, lack of prior international experience and the need to work across cultures were key considerations when arranging cross-cultural training,

Participant F had worked as an expatriate on two continents on different occasions and was able to use their insights in recommending the training for those they recruited to work overseas. They recalled fondly:

I had moved to a Western country and then an Asian country, and those experiences were completely different in terms of assimilation. [Europe] was like a 90-degree culture change, whereas Asia was a 180-degree culture change... what you do for fun, what they find important, their religion, their government. It helps to understand what it's like living there and what matches with where you're coming from and where the deltas are. Then how do you manage those differences?

Their prior experience helped them appreciate how understanding a culture, especially one where the lifestyle was significantly different from that which was more common in the United States, could help prepare people for their assignments.

Not all participants thought the cultural training was beneficial. Participant A had training provided by a third-party company. Participant A paused before replying, then said:

[The training] was more about cultural aspects and what to expect in that environment, such as what are the mannerisms what is offensive. We learned what to do and not do. Some of that was basic training. But we had never lived overseas, so some of that training was new to us. But I found that that training wasn't very real... the individuals teaching us didn't have much experience at that local level to really know what was going on at the business level.

In that scenario, while the company may have considered culture-specific training useful for expatriates new to the region, having trainers from the region may have added more value.

Practical Details

Some of the predeparture training given to expatriates was based on helping them understand the “nuts and bolts” of uprooting and moving to a new country. Participant C discussed how their company leadership went to great lengths to ensure their employees were ready for the logistics of moving to a new country. They clarified:

We have a checklist that is about three pages long that covers all of the broad considerations of an international assignment. And it's for the employee and the [supervisor] to know because those considerations are new for most people... What about language? What about your tax considerations? Does it make sense for you to stay in-country and close out this tax year? We'll get them a tax partner in this country and in their receiving country... We will provide references and reading materials.

Preparing the candidate on the logistics of moving to another country was a critical factor in preparing them to work overseas successfully,

Participant F summarized the training they and their spouse received based on their experiences as an expatriate. They reflected:

There are a couple of pieces. One is ‘Life in That Country 101.’ So what will our daily life look like? What is happening? And what's the delta between what they have there what you currently have? It's as simple as food, housing, and schools... then there is the business side to understand how they do business differently. To really get into the difference of the mindset of not only the people you're negotiating with but even the workers.

Understanding the aspects of living in another culture can help prepare expatriates for working in their new overseas location. Including family members in training is vital in assisting with the transition to living in another culture since all members of the expatriate’s family will be affected by the move.

In some cases, structured learning involved gaining hands-on experience.

Participant C described how the preparation and training began before the start of the expatriate assignment. In recounting the support provided to one expatriate, they said those efforts included:

...flying her over there before her actual departure from Canada to attend the European business planning meetings alongside the person that she would be replacing, and they would have planning meetings ahead of that. So the [current executive] would explain, 'Here's how I'm going to set the meeting up. Here's why I'm setting it up this way' or she would dial into those from Canada so that she could begin to understand what was happening in the business and where the challenges were. And to some extent, too, she might be able to offer some ideas for problem-solving, even before she's enrolled.

The opportunity to transition into the role by shadowing and supporting the current position-holder was essential for ensuring a successful expatriate assignment. A crucial aspect of preparing for an expatriate role can be gaining hands-on experience in the new position. Engaging with the new team and understanding how the current expatriate executive managed and led their team can be very insightful.

Informal

Learning about the lifestyle and workstyle of the overseas assignment was also achieved through less structured approaches. One participant described how the expatriate was expected to take the initiative to prepare themselves for the new assignment. Two other participants stressed the importance of having a mentor or coach who could assist them in the transition. Another perspective raised by participants was that the training did not have to stop once the expatriate arrived in the country. The training activity could be an ongoing experience, particularly when working with a mentor or coach.

Travel

Participant D noted the importance of visiting the location of the expatriate assignment before undertaking the new role. They explained how an employee might respond after receiving encouragement to learn more about a potential overseas assignment location. They quoted how a candidate might respond:

‘Well, I've never been to France. So I'd like to go there. Are there any meetings coming up that would allow me to participate and start to get a feel for the country? I'm going to take a vacation anyway. I think I'll take my family there on my own dime on vacation.’

That insight demonstrates the importance of accountability that leadership at Participant D's company promoted and valued. Visiting the upcoming assignment location before the start of the assignment can help set expectations for the expatriate and their family.

Employee Development

Some participants referred to the importance of mentors, and others to coaches. While the two approaches may differ, the goal of promoting personal growth and development is the same. Participant A commented that they learned more once they arrived in-country by linking up with other expatriates who had been there longer. As they replied when asked about the difference in getting a coach or mentor: “I think those terms are interchangeable. You can have a coach or a mentor, as long as you find the right person and the right personality - somebody that you respect and who respects you.” They further added:

You learn more about the culture and being in that environment from individuals who have been there for a while. So I learned more from friends that were there that had been through the process before on how to integrate into the culture than I did from any of the formalized training.

Others with more experience in-country were able to share valuable advice that can assist in adapting to the new environment.

Participant C talked about other steps their company took to help expatriates and their families adjust to living overseas. They explained:

We have spouses in receiving countries speak to [the other] spouses. We talk about language. The person we just sent from Canada to France, she and her husband don't have children. We set them up with French tutors six months in advance...we tend to be very careful with details because if the details aren't taken care of, then the spouse will raise their hand and say send me back.

In that instance, leadership at Participant C's company used a mix of structured language learning with informal exchanges between spouses to help prepare for living in the other country.

Participant D commented on the need for the supervisor to coach those they support. They noted that the supervisor remains the internal coach even if the employee has an outside coach. That role also takes commitment. Regarding the role of expatriate supervisors, Participant D stated:

They've got to be not only on board. They've got to be directing the coaching and changing themselves, because the outside coach needs to give that internal coaching client supervisor direct feedback on how they need to change and how to coach the other person. A lot of times, it's not the person alone who needs to do the change. Too often, leaders try to delegate the responsibility for development to an outside coach, and it's not effective.

Participant D stressed the importance of using feedback from the coach for personal growth. While not limited to expatriate positions, personal development and growth were often imperative given all the other changes occurring in working and living in another country.

Participant E discussed the informal aspect of expatriate training and said it could be as simple as connecting with someone with experience in that area. They reflected:

So I think it's somewhat informal, but you obviously don't want to throw somebody to the wolves without any [training] because it doesn't benefit the company. Then if they fail, you're back to square one, and you have to deal with unwinding all this stuff. So I think it's offered when necessary. But it's usually primarily [introducing you to] the people that you need to know, like here's a buddy you're going to work with.

It is in the interests of the leadership at the company to provide or encourage training for the expatriate as a means of ensuring success and continued engagement.

Leadership

Setting and implementing an international corporate strategy requires strong leadership. Establishing a new strategy involves organizational change that will impact individuals, teams, and entire companies. What function individuals have in an MNE shapes the factors they consider in expatriate selection. Based on their experience, each participant was asked what role leadership has in the expatriate training and selection process.

Assignments

As the previous examples highlighted, the factors that hiring professionals make in selecting candidates for international assignments may be impacted by the type of assignment under consideration. There are times when those roles are very senior-level positions. Sometimes the positions require a focus on knowledge transfer. The type of role under consideration also can impact whether the arrangement for the assignment is a full expatriate package with perks ranging from paid housing to full healthcare benefits; or whether the assignment is on a local contract arrangement where the employee receives compensation comparable to a local employee. Those differences can shape the type of decisions made.

Strategic Objectives

Strategic objectives are the driving force behind MNE planning. Since sending an employee can be costly for the company, the needs of the organization need to outweigh those high costs. Three factors were identified in this study.

Skill Set Requirement

When asked to describe the process for selecting employees for international assignments, Participant D stated that a primary reason their company assigns an expatriate overseas was that “it’s the only way we can get the required expertise needed for that other geography...” Participant D then provided an example of that situation when their company expanded operations in China:

We knew we could grow the market better if we had dedicated sales, marketing, and supply chain people on the ground in China. So we opened up a Chinese office and needed someone to run it. But we needed someone who knew our company, knew our values, knew our principles and methods, and who would not have a cultural conflict with the Foreign Corrupt Practices Act, or the UK Bribery Act. So we assigned someone from the United States to China for about four years. Before they finished, we hired local people, and trained them in the culture and practices.

As that example indicates, the person hired had a specific skill set to establish the overseas office.

Talent Development

Participant E commented on the objective of developing international expertise in executives groomed for more senior-level positions within the company. They commented that:

In most cases, the [international assignment will] be couched as a development opportunity, a favor. Or if you're trying to expand into a new market with a new vertical where you don't have any presence. I don't think there's a real defined process that most companies follow...part of the development is to put this person

on a rotation program, or in a [international] market for a couple of years to learn the business.

Providing that executive with broader international experience could benefit the company in the long run.

Participant C talked about talent development at their company and how decisions were made to send an employee interested in a more senior-level position on an international assignment to give them a broader perspective of the business. They reflected: “We did that with our current VP of HR. We bought him into the Americas for a year and had him run HR for four years, knowing that our current VP had a five-year runway at the time.” Developing internal talent can be a strategic priority for an MNE.

Organizational Control

MNE leaders who expand their business globally by acquiring other companies often strive to ensure a consistent work culture and operating style. Participant F had C-Level experience working internationally. In response to the question on the role of leadership in expatriate selection, they reflected on the approach their company leaders took after a new acquisition of a business in Europe. They stated:

Our COO, who has the trust of our CEO, will go over there for two years to manage the business. They want to make sure that the integration and transition go really well. It was a matter of handpicking the person they trusted, and the COO had done an expat assignment before. He's lived in a couple of countries and has that experience. And he was going over and helping that company operate like [our HQ] does...to bring them into the process and understand how we manage the business.

As that example demonstrates, incorporating a new acquisition into an existing corporation may require an expatriate able to establish the HQ corporate culture.

Leadership by Role

Selecting an individual for an expatriate assignment is often a careful decision that may involve multiple people and teams within an MNE. Expatriate assignments vary in the degree of responsibility required in the overseas position. Senior leadership at headquarters will undoubtedly be involved in the final selection of positions responsible for leading an entire region or country. The expertise of HR professionals can be a crucial asset when deciding which candidate to send. When uprooting and moving overseas, the individuals involved also need to carefully weigh the opportunities and challenges to their careers and families. Some participants responded to the question on expatriate selection and the influence of senior leadership by breaking it down by role. The following section focuses on the data as they apply to different leadership roles in expatriate selection.

Senior Leadership

Participant A commented on how they thought it was highly valuable that senior company leadership had experience working and living overseas if they were going to implement an international strategy. They reflected:

It is important for leaders to have a broad experience themselves so they can choose the right people to put in strategic positions in different countries. When leaders don't have the cultural experience, it's hard for them to pick the right people because you don't know what you don't know.

Those experiences help determine the strategy and how employees are identified and ultimately selected to work as expatriates.

Participant C shared their view on the role of leadership in the process of expatriate selection. They illustrated:

Leadership has ultimate accountability for the selection because they own the decision. That is our philosophy. HR at any level within the organization does not own the hiring decision. We support them, guide them, encourage them, and give

them recommendations. They also own that decision about training and the skills for the role. HR will support on all of it. We don't have any accountability. We'll make recommendations, and in many cases, they will go with our recommendation. Ultimately, this is part of our servant leadership philosophy. The coach owns that relationship with the employee. HR provides support. It's very clear.

As Participant C clearly described, senior leadership was ultimately responsible for deciding who to select for an expatriate assignment.

Senior leadership may be directly involved in the selection process because they want to select someone they can trust. Participant E had extensive experience in selecting candidates for expatriate positions and noted the realities of organizations where the person making the decision was a senior leader within the company. Participant E reflected:

This probably won't come as a tremendous shock to you, but I would say it's somewhat of an imperfect process. There's a comfort level that the executive team has with a known commodity when a need opens up overseas. It depends on the role, of course, but a lot of times there's that certain comfort level that a CEO will have to tap a known commodity on the shoulder and say, 'Hey, would you do this for two years?' There's always the appeal of something like that, depending on the country, the family, their children, what ages, and all that kind of stuff. It's exciting to go to Singapore or Hong Kong.

Participant E's insight highlights not only the critical role played by senior leadership in expatriate selection but also the initial excitement an individual may experience when being offered an overseas environment. There is an appeal to seeing the world and living in foreign locales. Balancing the excitement with the reality of dealing with a move is sometimes the more difficult part.

Participant E further noted the essential role that senior leadership often plays in the decision-making process. They observed:

For the important roles, leadership should be actively involved in the decision. And there should be some level of calibration, usually informal and behind the

scenes, to make sure that the leadership team is aligned and comfortable with the person that's being selected. Sometimes there is competitive friction...If you're pulling somebody from my organization, you're leaving me a huge gap in the US for that role. How are we going to fill that gap? So my point is that leadership should be engaged in the decision. It's a senior-level important role because there are many follow-on implications when moving a person at a senior level to an international role.

For positions overseas that require a close working relationship with senior leadership back at headquarters, there may be an active interest in determining who is selected for the assignment. Trust in an expatriate candidate can be a significant consideration in the selection process.

HR

Participants were also asked about the role of HR in the final decision for expatriate selection. The participants' perspectives regarding HR appeared to depend on whether the participant was also in HR and to what extent the HR department had the necessary skills and experience among its team members. Participant A, an executive in a line management role, noted: "The majority of the HR representatives didn't have a whole lot of international experience. That led to a lack of understanding of local laws and requirements."

Participant B was an HR professional. They provided background on their interpretation of their role within HR. They pointed out:

I was really aligned with the business. From my HR standpoint, I was more operationally a part of the decision-making...I always said you have to understand the operations. When someone came to work in HR, I first put them in the business unit. For the first two weeks, they would sit with one person to learn their job and then sit with another person to learn what they did. They would say, 'but I am HR.' I would say you first have got to understand the business to support the business. You can't just sit in your golden tower and conduct interviews and just conduct the interview and say, here you go. Because if you do, you won't know if that person has the right skill set or personality traits and be the right fit to make it work.

Participant B also reflected on the value that they, and an experienced HR executive, could bring to the process. They noted from their experience: “I was fortunate that I could read people and their behaviors. I've always been fortunate in that. But it's because I've interviewed thousands and thousands of people in my career.” The advanced skills of highly qualified and experienced HR professionals can enhance a company’s process for expatriate selection.

Participant D, a C-level leader with a background in HR, commented on how they thought one candidate might not be a good fit. They explained how they had observed the candidate:

...behave more in a self-centered way. They didn't really embody the philosophy of servant leadership. They didn't have very much leadership experience and they were being asked to take an assignment in a country where they would have leadership over 50 people.

When that person did run into problems, Participant D saw their role as advisor to leadership and worked to bring about a change in leadership for that assignment.

Participant C was an HR professional and reflected on how they viewed their role concerning expatriate selection. In describing the role of HR, they explained:

We don't have a final say in the decision. We are an HR business partner, and we are not only supporting but driving succession planning and internal talent mobility from a planning perspective. But ultimately, the commercial leaders make that final decision. For country leadership roles, it would rest with the CEO and perhaps the regional team leaders to make that final decision.

Their comment highlights the active role that senior leadership may have in the decision-making process if the position overseas is equally at the senior level. Senior expatriate assignments will ultimately be made by senior leadership.

Participant D clearly defined what they saw as the parameters for HR in selecting employees for assignments. They reflected:

We're not the decision maker in 99.9% of the cases, unless a matter comes up that is either one of ethics or law and regulations. Barring those types of subjects, then the HR function is as an expert advisor, to be the most knowledgeable about the aspects of the decisions related to people, to provide the best information, both factual and opinion, and to support leadership, who has the ultimate accountability of making such decisions.

From their perspective, HR has a critical role to play in the selection process, but it is a supporting role.

Participant D also commented on the roles that other positions in the company play in the expatriate selection process. They reflected: "The accountable decision maker drives the process. They are the ones who have to make the decision." In some cases, they noted it would be the CEO if the decision involved a senior leadership role. But they also stated that it would sometimes be the line manager in conjunction with the employee. They stated that:

It is the line leader's accountability at the level of decision making that is appropriate for the assignment to make the right call. And it's the accountability of the potential candidate to decide whether or not they're going to accept the offer and to figure out what they need to find out to be able to make a good decision. In other words, there are no victims.

Participant D considered the expatriate selection process involving all the key players, most notably the candidates themselves.

Participant E commented on their experiences in an HR role and how HR could be involved in selecting employees for expatriate assignments and training. They said:

It depends on how strategic the HR function is. If the company has a tactical HR function, the line leaders in the business would be the ones who know the employees the best within their organizations. But a strategic HR function would be joined at the hip with the leaders to really help define who those people are... Sometimes HR would just be involved in the execution. For example, I have

somebody on my team who runs global mobility today. She manages the tax vendors, the immigration vendor, and the relocation vendor. She makes the cost projections if there's a proposed move so we can include it in the forecast. So, a lot of times, you'll have the HR function providing tactical support, but the business leader would be the one to say, 'Hey, I want to move [this person] to Hong Kong – help me do this.' The business leaders are the ones that typically would initiate that move in combination with the president and the business partner.

Participant E acknowledged that the function of HR could vary based on the internal strategy used at a company.

Participant E further noted that it would be effective for a company if the global talent acquisition and the global mobility functions worked more closely. But they said that in reality:

It's not that they don't talk to each other, but nine times out of 10, it's top down. A bottoms-up way would be all right if mobility and talent acquisition are working together to prepare. And it's not talent acquisition; it's the talent function where they have a real-time top talent list, with the know who has what skills and who's on the succession plan. That they have a pool of people to draw from, and then they would work with mobility to figure out how to make it happen. But in reality, it doesn't work that way. In reality, what happens is the EVP says, 'Okay, I need to fill this role in Singapore, and this is the guy I want to send.' Then everyone just kind of scurries to make it happen.

As this comment suggests, senior leadership can be the overriding factor regarding who is sent on an assignment overseas.

Participant F was a C-level executive with experience in line management. They worked with a startup operation that had few experienced people in some positions. They did not rely on HR for their selection process. They reflected:

In this case, human resources wasn't really involved other than the process itself. We didn't have a very strong human resources organization, so they were not really part of that decision. So it was based on what I was thinking. And they helped with the process and paperwork, but there was no assimilation or no guidance from their side.

If the HR section does not have experienced professionals who can assist in selecting expatriate positions, line management will likely step in and determine what is needed. If those line managers have prior international experiences like Participant F, they may know the mix of business skills and personality traits most suitable for the expatriate role. The selection process may be less defined if the hiring manager does not have that experience.

Summary

The themes, conceptual categories, and conceptual subcategories were derived from the data collected from the six participants interviewed. Each participant presented their personalized data based on their experience in that process. To explore the meaning and essence of the experiences of the participants, a phenomenological methodology was used. The key themes that emerged from the analysis of the interviews included: selection, training, assignments, and leadership. The data helped to illuminate the answers to the two research questions regarding factors to consider in selecting and training candidates to secure continued engagement and fit for expatriate leadership roles. The meaning and application of those findings, the limitations of this research, and the recommendations for further research are presented in Chapter 5.

CHAPTER 5: CONCLUSIONS AND DISCUSSION

The purpose of this study was to explore the lived experiences of hiring professionals at small and midsize multinational enterprises (MNEs) to better understand the global mobility criteria used to select candidates for expatriate assignments and predeparture training. Meeting the strategic international expansion goals of MNE leaders requires sending employees on international assignments to execute those goals (Valk, 2019). The problem examined in this study is that many MNE leaders do not have defined specifications that could enhance predictability in expatriate success (Caligiuri, 2013). The problem may be even more pressing in small and mid-size enterprises (SMEs), as those smaller entities may lack established human resources (HR) processes and company resources for selecting expatriates (Festing, 2007). International expansion and global mobility depend on identifying expatriate candidates with the needed experience, skills, and personal characteristics for working in an overseas assignment.

Working overseas can present new challenges for expatriates. When working overseas, those company-assigned expatriate managers often face more challenging work and daily life situations than they typically would experience in a domestic assignment (Paik et al., 2017; Selmer & Luring, 2015). Sending the wrong person on an international assignment could cost their companies substantially, as a full expatriate family package could be as much as \$1 million a year (Society for Human Resource Management, 2017). MNE leaders would benefit from having a global mobility process for selecting expatriates who are the best fit for their overseas positions.

Getting the right person-job fit depends on identifying expatriate candidates with the skills and characteristics needed for a particular position. Employees with specific

traits and experiences may be better suited to work abroad and handle the challenges of adapting to a new culture (D. Wang et al., 2017). Those candidates who demonstrate a strong interest and motivation to work abroad might be better positioned to address the challenges of an international assignment (Cerdin & Le Pargneux, 2009). Selecting expatriates for continued engagement and fit in their assignments should be a primary feature of a global mobility program and part of the overall strategic plan for MNE leadership.

Six individuals with experience in selecting candidates for expatriate roles and predeparture training were interviewed for this study. Participants included individuals with experience as HR professionals, line managers, and C-Level executives. A phenomenological process was conducted by transcribing the data after the conclusion of each interview. The data were analyzed by reviewing the interview transcripts, making notes, and analyzing the text with line-by-line coding to identify keywords. The themes related to expatriate selection generated from that analysis are selection, training, assignments, and leadership.

The common themes, conceptual categories, and subcategories generated by the participants during the interviews were presented in Chapter 4. Those findings in Chapter 4, used in conjunction with the literature reviewed in Chapter 2, shape the discussion covered in Chapter 5. A qualitative phenomenology approach provided structure for this research and was grounded on the topics generated by the literature review. The study was framed using two research questions:

R.Q. 1 What do hiring professionals consider in selecting candidates for expatriate leadership roles to secure continued engagement and fit?

R.Q. 2 What do hiring professionals consider in training candidates for expatriate leadership roles to secure continued engagement and fit?

Discussion of Findings and Conclusions

The findings summarized in Chapter 5 were generated by the participants' responses to the interview questions. A discussion and synthesis of the key findings of the study as they relate to the research questions are included in this study. In addition, Chapter 5 covers the application of the research and conclusions to the problem statement. Recommendations for action as applied to the role of leadership in the expatriate selection process are also shared. Finally, a recommendation for action, further research, and a concluding statement round out the headings included in this chapter.

Chapter 5 provides a synthesis of the findings on the research questions generated by the discussions. The data generated by the interviews were arranged into themes, categories, and subcategories related to both research questions. Factors considered when selecting expatriates for their assignments relate to factors equally applicable in determining the type of training to provide.

Research Question One

The first research question was: What do hiring professionals consider when selecting candidates for expatriate leadership roles to secure continued engagement and fit? The aim of that question was to delve into the essence of the lived experience of hiring managers in selecting employees for overseas positions who are more likely to meet the needs of the job and the challenges of adapting to life overseas. The conceptual subcategories of competencies, motivation, and personal situation as they apply to the candidates were issues that shaped the participant discussions. The participants

acknowledged that individuals with specific knowledge, skills, abilities, and other characteristics (KSAOs) would be more capable of adapting to an overseas work environment. In addition, the participants reflected on their experiences in understanding a candidate's motivation for wanting to work overseas, as that drive could impact an expatriate's ability to overcome challenging cultural adjustments. Finally, an expatriate candidate's personal situation and family considerations were viewed as a significant influence on the expatriate's decision to accept or reject an expatriate position. If the expatriate candidate realized their current family situation was not ideal for working overseas during an interview or discussion, the candidate would not likely accept the position.

Competencies

Selecting candidates based on KSAOs can increase the probability of expatriate success. Some of the key competencies and characteristics raised by the participants included the following terms and concepts: self-awareness, nimble learning, flexibility, empathy, adaptability, open-mindedness, prior international experience, adventure-seeking, and willingness to transfer knowledge. A common refrain from the participants when asked what they were looking for regarding expatriate selection was a candidate's ability and willingness to adapt to change. As one participant phrased it, they wanted a person with the "right DNA" to take on an expatriate assignment. Those findings are consistent with the literature review and the suggestion that individuals with certain KSAOs can be expected to be more successful in adapting to foreign environments (Caligiuri, 2013; Valk, 2021). Those characteristics matched classifications for cultural competencies regarding natural curiosity and cultural metacognition (Johnson et al.,

2006; Kraimer et al., 2016; Valk, 2021). Selecting candidates for expatriate positions by referencing such KSAOs as prior international experience, openness to learning about new cultures, and high levels of self-awareness will increase the likelihood that they adapt more readily to working overseas.

Openness and agreeableness are traits that aid in expatriate adjustment. Concerning the big five personality traits of conscientiousness, agreeableness, neuroticism, openness to experience, and extraversion (Piedmont et al., 1991), it is interesting to note that openness and agreeableness appear to match most closely with the feedback from participants. Those findings align with a study in the literature review of the big five personality traits on expatriate adjustment and job performance in which the authors suggested that the big five traits could be used to predict expatriate adjustment (Bhatti et al., 2014). Dealing with unexpected change was considered a common occurrence for those moving overseas. One participant commented that while people who did not fully demonstrate those abilities could still adjust to living in a new culture, it would be a more difficult process. However, as suggested from the data generated from the participant responses, a person open to change and curious about the world around them would be more able to adapt to the inevitable challenges of working in a new culture.

Motivation

The concept of motivation in this study extends beyond merely possessing competencies and includes the willingness to take action to prepare and withstand adjustment challenges. Candidates seen as most able to succeed working overseas need to have certain KSAOs and, even more importantly, be motivated to use those skills to take

action. That view aligns with the construct of cultural competence, which assumes that an individual actively applies their cross-cultural knowledge, skills, and personal attributes in a new cultural setting (Johnson et al., 2006). Understanding a candidate's motivation should be a factor in the expatriate selection process.

Motivation and resolve to work overseas can provide the drive to adapt to the inevitable challenges of living and working in a new culture. Dealing with the unexpected, being comfortable with change, addressing the challenges of moving, and facing disruptions to daily routines were examples of why taking an international assignment could be challenging. All the participants mentioned that, during the expatriate candidate interviews, it was important to stress the difficulties of relocating and working overseas. Knowing what to expect helped set realistic expectations regarding the non-work-related aspects of the assignment. Importantly, asking those questions caused the candidates to consider whether an expatriate assignment was a career goal. That view is similar to the concept of internationalism as a career anchor, and the excitement and interest individuals have when presented with the opportunity for an international assignment (Lazarova et al., 2014). As one participant noted, the motivation or drive for wanting to accept an expatriate assignment is a "self-selection" factor. Gaining insight into a candidate's motivation to work overseas should be an essential step in the expatriate selection process.

Family Situation

Understanding the expatriate candidate's personal circumstances are also critical in determining the right fit for the assignment. Each participant was vocal in stating the importance of understanding the family situation of the candidates, namely any issues

with a partner, children, or elderly parents. When discussing an expatriate assignment, the move overseas was a “package deal” involving the expatriate and their whole family, as one participant noted. Including family issues in the expatriate recruitment and selection process influences whether the candidate will decide to accept the assignment (Martins & Diaconescu, 2014). Expatriate candidates also need to factor in obligations for elderly parents or other family members who would not be joining on their assignment. As some participants said, working overseas means disrupting one’s life and the lives of their family members. Hiring managers should strive to understand any family or personal situation that could limit the availability of an expatriate candidate to work abroad.

Early departure from an expatriate assignment is one of the most visible aspects of expatriate failure. An expatriate with a difficult family issue is more likely to end an assignment early. As one participant commented, the company wants to avoid the situation where the “spouse will raise their hand and say, ‘send me back.’” Another participant commented on the challenges families face when the expatriate goes to the familiar company office each workday. While the expatriate is at work, their family remains at home to meet the challenges on their own in adjusting to the new culture. That same participant reflected on how their spouse joined them in their company-sponsored cross-cultural training course and how that benefited them. Including families in cross-cultural training is critical since their adjustment significantly impacts the expatriate’s ultimate success or failure (Erogul & Rahman, 2017). To avoid an increased likelihood of premature departure, hiring managers should clarify with candidates during the selection process any potential family challenges in relocating overseas.

Ways to Assess

Observation and interviews are the two most effective means for assessing expatriate candidates for continued engagement and fit. Sometimes the observations were not a new undertaking, but due to having worked with a candidate for many years. In other cases, the observations were based on having a meal together and seeing how the person reacted in that situation. Regarding interviews, each participant mentioned the importance of speaking about the challenges the expatriate and their family members could face when moving overseas. Setting realistic expectations was a driving concern during the interviews.

Observation. Observation is an effective means of providing objective behavioral feedback and a powerful way of assessing a candidate's characteristics and traits. As one of the participants stated, performance reviews at their operation were based on observable behaviors. Observation is one of the primary methods of collecting data in a qualitative study (Peoples, 2021). In this sense, the hiring managers sought to identify the presence of KSAOs by noticing actions or considering the expatriate candidate's comments. As one participant stated, hearing a person complain about not having ice in their water may indicate they are very particular about having certain foods and perhaps would have more difficulty adapting to another culture. Seeing how a candidate behaves in one situation can help predict how they will behave in a similar situation.

Trust based on many years of interaction and observation can be crucial in selecting a candidate for an expatriate assignment. Prolonged interaction from years of working with someone can provide the basis for high levels of trust. The findings from this study highlight how senior leaders at the MNE headquarters want a trusted person for

a senior-level expatriate assignment. Having that level of confidence in a candidate was most significant when the expatriate position required high levels of responsibility, such as the position of country manager. That perspective correlates with the literature review. Trust from senior leadership developed over years of working together, together with technical capabilities, are often the most critical criteria for senior managers in deciding to send someone on an expatriate assignment (Martins & Diaconescu, 2014). Trust founded over many years of observing a person at work is decisive when selecting a leader for a high-profile expatriate position.

Interviews. Interviews are often the most effective approach for understanding a candidate's goals and motives. Interviews are the basis for eliciting comments and understanding the KSAOs and motivation of a candidate. As one participant said, you just need to ask a candidate why they want to accept an international assignment. In conducting more structured interviews, the participants did not ask directive questions about preferred ethnic foods or favorite foreign movies. Instead, several participants focused directly on the challenging and negative aspects of living abroad. Or, as one participant said, "I try to talk them out of it." Those findings regarding the challenges of working overseas are consistent with the literature review. Providing a realistic understanding of the challenges of adapting to a new culture before accepting the assignment is more likely to set realistic expectations of their position that are aligned with those of the organization (Perera et al., 2017). Focusing on the challenging aspects of working abroad can help elicit the true motivation and interest to move overseas. Hiring managers should stress the negative aspects of working abroad to increase their chances of hiring expatriates who are a good fit for the assignment.

Hiring managers who talk candidly about the negative aspects of working overseas encourage the candidates to consider personal issues that may influence their decision. The advantage of speaking directly about overseas living challenges is that the approach may enable candidates to discuss family issues. Asking directed questions about family and personal situations often have legal ramifications. As a result, hiring managers at many companies still avoid asking about the partner and the family during the expatriate selection process (Martins & Diaconescu, 2014). Therefore, getting an expatriate to volunteer information on potential family concerns can be an effective tactic for hiring managers. As one of the participants said, sometimes the timing for an international assignment was not right if the person was going through a divorce or had an elderly parent to take care of. When hiring managers openly discuss the drawbacks and challenges of moving overseas, the candidates may be more likely to share personal or family issues they need to consider and which HR may not be in a position to ask about directly. Getting candidates to speak about family issues regarding the expatriate assignment can be essential in candidate selection.

Understanding whether working overseas aligns with an expatriate's goals and values is vital in selecting for assignment fit and long-term engagement. Asking questions that get to the root of a candidate's interest and motivation for working overseas may also determine whether an expatriate assignment offers the individual a sense of vital engagement. Anyone who fully understands the challenges of moving overseas but still wants to accept the expatriate assignment may be demonstrating their true motivation. The construct of vital engagement takes into account a person's values and beliefs by considering activities that bring an individual enjoyment and meaning

(Nakamura & Csikszentmihalyi, 2004). By actively highlighting the personal challenges of adjusting to a new culture, and in the case of one participant trying to talk the candidate out of taking the expatriate assignment, the hiring manager may better understand the candidate's interests and motivations. Using the construct of vital engagement will draw out responses to help gauge whether working and living overseas generates a sense of purpose and meaning for the candidate.

Research Question Two

The second question was: What do hiring professionals consider in training candidates for expatriate leadership roles to secure continued engagement and fit? The focus of that question was to explore the experiences of hiring managers in the predeparture training process. More importantly, raising that question addresses what type of training exercises can best prepare the expatriates for their assignments. Training programs often depended on the requirements of the assigned region and included formal and informal training options. The participants also noted that training did not have to stop once the expatriate arrived in the country and could consist of ongoing interactions with mentors and coaches acting as advisors.

Region Specific, Practical, and Hands-On

Training specific to a region or culture is more practical for expatriates about to depart for their assignment. Four participants discussed the challenges of going to some regions compared to others. In particular, specific geographic regions were considered more challenging, whether due to cultural differences, living standards, or safety concerns. One participant commented on the significant cultural differences in adapting to work in Asia versus Europe. Participating in training before moving overseas can

provide vital insights to help with cultural adjustment (Sousa & Gonçalves, 2017).

Predeparture training becomes more critical depending on the greater differences between the lifestyle in the new location and what the expatriate is familiar with in the United States. Gaining insight into the new culture through predeparture training aids in expatriate adjustment.

Family members benefit from expatriate training. Since the expatriate's family members often accompany them when relocating overseas, including them in cross-cultural training is essential. The training should not be seen as just a one-time activity. While training is often arranged predeparture, post departure cross-cultural training for expatriate managers and their families can be equally valuable in developing knowledge and skills (Erogul & Rahman, 2017). When the expatriate and their families are already living in their host location, any ongoing training they receive may be particularly relevant in their daily lives. MNE hiring managers with the available resources should provide training for both the expatriate and their family members to ease the adjustment to their location.

Headquarters staff can benefit from cross-cultural training and interactive exercises. Training does not have to be limited to the expatriate and their family. One participant reflected on how the predeparture cross-cultural training their company organized for the expatriate included headquarters managers who would interface with the overseas team. The findings from that experience align with a study from the literature review by Presbitero and Toledano (2018), in which the authors suggested global teams have enhanced interactions and can better address work-related cultural challenges when all team members have cross-cultural training. Since expatriates often

face unexpected cultural challenges in their new work environments, having colleagues at headquarters who better understand the cultural issues may enhance communication and coordination between the overseas operation and headquarters. Cross-cultural training for departing expatriates and their families would also benefit headquarters staff.

The most effective cross-cultural trainers have direct experience living in the culture that is the focus of the training. The knowledge and background of the trainers conducting the cross-cultural training are also important considerations. One participant stated that the training they received from a third-party contractor was given by trainers without firsthand knowledge of China, the location of their expatriate assignment. As a result, the participant thought the training was of limited value. Practical cross-cultural training includes cultural-specific simulations (Okpara & Kabongo, 2017). Trainers who can provide a detailed cultural understanding, or “Life in That Country 101,” as one participant described it, are much more effective in preparing the expatriates and their families to handle the daily life issues in the new environment. Hiring managers arranging training for departing expatriates should select trainers with firsthand experience in the relevant culture.

Training other than classroom training can be practical for preparing expatriates for their assignments. Often the more hands-on the activity is, the more effective the training will be. One participant described how preparation for an expatriate assignment involved shadowing the person currently in the position to see firsthand how things were managed. While that preparation was not specifically cross-cultural training, watching how the overseas team interacted with the current expatriate manager can provide valuable insight into the new cultural setting. Those findings are consistent with a study

referenced in the literature in which the authors of a study suggested that cross-cultural training that included role-play was most effective in helping expatriates prepare for work in a new cultural environment (Okpara & Kabongo, 2017). As one participant commented, gaining a better understanding of a new culture was essential, but so was understanding the new working environment and standard approaches to business. Active participation in hands-on training could help prepare expatriates for real-life work scenarios they might encounter in their international assignments.

Informal

Not all expatriate training has to be arranged by the hiring manager. While formal training programs were recognized as helpful in preparing to work overseas, informal measures for training and preparation were also beneficial. Receiving guidance from someone with experience living and working overseas was an effective tool noted by several participants that could provide essential insights into adjusting to life abroad. Since expatriates often face increased stress when adjusting to a new culture, arranging or encouraging support from mentors and coaches could provide helpful guidance for expatriates (Salomaa, 2015; Schuster et al., 2017). Managers of global mobility programs should encourage partnering opportunities for expatriates to work with coaches, mentors, or even experienced colleagues via an informal buddy system. Effective training for an expatriate can be provided by individuals willing to help develop and advise the expatriate as needed.

Training does not need to be limited to just predeparture programs. Training for expatriates can continue even once they have relocated to another country. Rather than just offering training before going overseas, having a resource that expatriates could

continue to work with was an essential part of those arrangements. Training and coaching can help improve employee performance (Marcdante & Simpson, 2018). Training for expatriates should align with the long-term impact their role could have on overall MNE strategic plans. Training options should be offered to expatriates for the length of their overseas assignments to maximize their performance.

Application of Findings and Conclusions to the Problem Statement

The problem is that many leaders at MNEs do not have clear and defined specifications for selecting candidates for expatriate leadership roles and training. However, as suggested in the findings of this study, some small and midsize MNE leaders have successfully implemented criteria that can be readily applied in selecting for expatriate assignments and training. One participant in this study stated that their company followed a clearly defined process for evaluating candidates for expatriate assignments. At first, that finding seems to contradict prior research in which the author suggested that SME leaders usually lack established hiring processes and often select expatriates solely for their technical skills (Festing, 2007). However, concerning the company with a clearly defined evaluation process, that SME was also a well-established business with several decades of history and known for its strong and dynamic leadership. The HR leaders at the SME were experienced professionals who played a strategic role in expatriate selection. Thus, the findings suggest that SME leaders can have criteria-driven processes for evaluating performance if they have experienced managers who can implement those processes.

Having criteria for expatriate selection depends on having experienced HR professionals in the company. Even in the case where participants referenced how an

outside management company had developed the criteria for employee assessment, it was still dependent on HR managers to follow those criteria. Having those criteria in place depends on having an HR department focused on its role and, even more importantly, given the authority to make recommendations. Implementing a strategic process for selecting employees for international assignments requires active support and commitment from senior leadership (Mirfakhar et al., 2021). A starting point in that process is hiring and developing capable HR professionals. The effectiveness of an HR section in handling global mobility issues and the experience level of the HR professionals in that section correlate with the vision and direction set by the company's leadership. Effective company leadership is the starting point in creating effective expatriate selection processes.

Company leaders who do not have a capable HR team are likely to have limited procedures for expatriate selection. When the participants commented on expatriate hiring processes where decisions were made more haphazardly, either the HR managers lacked the skill set to oversee the process or were not considered a critical element in the decision-making process. In either case, the capability of the HR section depended on leadership having the vision to develop and grow the skill set of their company's HR professionals. If HR managers do not have experience in strategic expatriate hiring, the selection process will remain more intuitive than systematic (Collings, 2014; Valk, 2019). Even though company leadership should have the final say in the expatriate selection, HR leaders can provide an additional perspective in the selection process that will result in more effective choices. Developing and empowering a capable HR team will increase the likelihood of structured methods for expatriate selection and predeparture training.

How expatriates are selected for their assignments is still influenced by the type of role they will fill working overseas. In cases where senior leadership had already identified a preferred candidate, the overall package often was focused on enticing the person to take the assignment. That finding aligns with the literature review. Many processes fulfilled at companies by HR managers still rely on a recruitment and selection approach that legitimizes and justifies decisions already made informally by senior leaders (Collings, 2014). Given the high stakes involved in having a person trusted by senior leadership to take on an overseas position with a high level of responsibility, it is understandable that senior leadership will want to be involved in the final decision. In addition, leadership has that ultimate responsibility since they are directly responsible for the outcome of their decision. However, even when senior executives are deeply vested in expatriate selection, MNE leaders can still benefit from using experienced HR professionals as advisors.

HR managers are often more directly involved in expatriate selection when employees volunteer for an international assignment, and the extent of the position's responsibilities may be more project-focused rather than country-wide in scope. In cases where people were volunteering to take an assignment, more consideration was given to determining the right fit. In that example, establishing a framework for expatriate selection based on the construct of vital engagement may be effective for evaluating a candidate's motivation and personal characteristics for an international assignment. In other words, does an expatriate assignment align with a person's values and beliefs and generate enjoyment and meaning? Sending someone technically capable but unlikely to

adapt to the new work environment could have long-term negative consequences for the company.

Predeparture training is essential for expatriates. As highlighted in the findings, all the participants acknowledged that their companies had predeparture training programs for expatriates. In some cases, the training was outsourced entirely, and in the case of one participant, conducted by trainers with limited knowledge of the target region. When resources are available, SME managers should carefully evaluate the training options regarding cultural differences, living conditions, and safety concerns. The SME managers could work with expatriates to arrange training tailored to meet specific requirements unique to the region or the personal situation of the expatriate's family. In addition, arranging training that includes others at headquarters who will interact with the overseas office could lead to additional benefits. Cross-cultural training should be offered to expatriates, their families, and headquarters staff to strengthen their abilities to engage with others.

Innovative approaches can be implemented to arrange predeparture training for expatriates. In cases where resources are limited, SMEs could be more creative in preparing the expatriate to go overseas. Arranging for a mentor or coach to provide ongoing support could be very useful. The expatriate may also want to take that initiative and identify resources and contacts that could provide unique insights into the new culture. MNE leaders, hiring managers, and expatriates can consider various options for acquiring the needed cross-cultural skills to help maximize performance.

Application to Leadership

To ensure their companies continue to grow in increasingly competitive global markets, leaders of MNEs need to establish and set goals for international growth. They often rely on expatriate leaders to implement those company targets to implement those objectives. Setting a new strategy involves changing direction as needed. Implementing successful transformation within an MNE depends on how that organizational change is accomplished (Kotter, 2012). Leadership in SMEs is particularly critical in setting the vision and managing the process of embarking on a successful internationalization strategy (Hsu et al., 2013). As some participants noted, the international experience of the CEO or other senior leaders at an MNE is critical in setting a global vision. Those leaders need to identify the executives on their teams who are the right fit to implement that change (Almazrouei & Zacca, 2015; C. H. Lee et al., 2017). Likewise, those employees undertaking expatriate assignments must execute the needed change while also handling the transformation in their personal lives. Leaders can set a vision for organizational change that motivates people even when parts of that change are personally painful (Kotter, 2012). The idea of working in an exotic location on an expatriate assignment can seem like a thrilling adventure. Still, the disruptions to the lives of the expatriate and their family members relocating to a new country and leaving behind their social network can be stressful and challenging.

The human resources function should be a vital part of the expatriate selection process, given the role of HR managers in supporting the development of a company's most important resource, its human capital (Valk, 2019). How HR departments are organized, staffed, and included in the strategic selection of expatriates can be a

significant factor in enhancing a company's global mobility system (Valk, 2019). This process could consist of observations and interviews to determine if expatriate candidates demonstrate the needed competencies and motivation. While not the final decision-makers in expatriate selection, several participants noted that experienced HR professionals could serve as advisors to senior leadership. However, that role can only happen if MNE leadership focuses on recruiting and supporting the development of their HR professionals. A key element in enhancing the capabilities of the HR section is for senior leadership to elevate the status of HR and demonstrate their ongoing commitment and support for that change so that it permeates all levels of the company (Mirfakhar et al., 2021). So rather than a senior leader simply informing HR about who has been selected to go overseas as an expatriate, HR leadership needs to have a strategic role in that global mobility process.

Finally, as previously noted in regard to training, other headquarters staff should be included in cross-cultural training if they interact with overseas colleagues. If the leadership at an SME is going to be successful at expanding internationally, all levels of the organization could benefit from training that assists in their interactions with colleagues at the overseas subsidiaries. Leaders who want to transform a corporate culture must commit to and invest in developing the cultural competencies within their organization (Caligiuri, 2013). Committed leadership is essential in accomplishing organizational change to strengthen and modify a company's culture (Kotter, 2012). Selecting expatriates, arranging training, enhancing the role of HR, and transforming a corporate culture to deal with the change of internationalization to compete globally, are all key areas in which leaders must step up and play a critical role.

Recommendations for Action

This research provides insights into the factors that hiring managers could consider when selecting candidates for expatriate assignments and training. While the findings included references to the limitations of HR managers when interacting with senior leadership, some basic steps could be applied to help address the problem that small and midsize MNEs often lack criteria for effective expatriation selection. The findings of this study suggest that several practical approaches could be applied to global mobility programs to enhance a company's capabilities to identify, train, and support expatriate executives.

Set Realistic Expectations

While the idea of moving overseas may initially seem exciting, leaving behind one's social network, adapting to a new lifestyle, and dealing with a new culture can be challenging and stressful. Interviews with expatriate candidates that highlight the drawbacks to moving abroad could cause the candidate to reflect more deeply on their potential move. Providing a realistic assignment preview before receiving the assignment is likely to set the right expectations and align with the organization's needs (Perera et al., 2017). Reflecting on whether one is up to the challenge of relocating overseas will help illuminate an expatriate candidate's level of motivation.

Assess for Family Issues

Hiring managers need to discuss with expatriate candidates the challenges of working overseas. Setting realistic expectations may also cause the candidates to carefully consider other factors affecting their decision, whether being separated from an elderly parent or dealing with the needs of a spouse and children. How effectively the

expatriate's family adapts to living overseas significantly impacts the expatriate's ultimate success or failure (Erogul & Rahman, 2017). While adjusting to a new culture may be difficult for some people, it is not impossible. Supporting the needs of a family member may be an overriding factor in whether a candidate accepts an expatriate assignment. Expatriate candidates should consider their family situation when deciding whether to accept an international assignment.

Arrange Advisors for Ongoing support

Leadership at MNEs should arrange and promote expatriate partnering opportunities with those who can support their ongoing growth and development as mentors or coaches. Since expatriates often face increased stress while adapting to a new culture, arranging for support from those who can offer guidance and input can assist in that transition (Salomaa, 2015; Schuster et al., 2017). Even an informal buddy system could provide structure for offering useful advice to expatriates. Moreover, once in-country, ongoing training can aid in expatriate adjustment assignments (Erogul & Rahman, 2017). Given the cost of sending an employee overseas on long-term assignments, taking steps to enhance an expatriate's abilities and skills for working in a new environment would be a remunerative investment.

Leverage HR Resources

Use HR leaders as a strategic resource. While the line managers need to determine if the expatriate candidates have the required technical skills, all participants stated that HR management had a crucial supporting role in global mobility decisions. That perspective aligns with the literature review findings that experienced HR managers may be better positioned to drill down and determine if candidates have the right KSAOs

(Caligiuri, 2013). When expatriate management procedures are not integrated within HR, the lack of coordinated oversight can hinder the effectiveness of an organization (Collings, 2014). As the findings suggested, leadership at SMEs can also look for ways to leverage the processes and criteria developed by outside management companies to apply those methods in-house. If leadership is willing to take the initiative, HR can be used as a resource when selecting candidates for an expatriate assignment, even if only to provide a second opinion.

Recommendations for Further Research

The research conducted in this qualitative study explored the lived experience of hiring managers with expertise in SME operations who also had experience in selecting candidates for expatriate assignments and training. Two research questions shaped the focus of the research. This qualitative study was conducted through semistructured interviews with six participants with executive experience within HR, line management, or at the C-level. The data from those interviews provided a detailed understanding of the experiences of those individuals in selecting candidates for expatriate positions and training based on the fit and potential for continued engagement.

The findings suggest that the repatriation of expatriates, once they have completed their assignment, is a crucial part of a global mobility program. Repatriation was a significant issue that several participants raised when they referenced returning expatriates who left their company for another company upon completing their international assignments. In their study on repatriation and corporate ROI, Breitenmoser and Bader (2016) suggested that few MNEs have formal repatriation strategies focused on onward positions once the expatriate assignment ends. In the case of an expatriate

assignment arranged to groom a company executive for a more senior position that is global in scope, those departures represent the loss of significant company investment in the individual. Losing an employee at the end of an expatriate assignment can be a severe setback for MNE leaders.

Repatriation is an issue that could have the most significant impact on long-term return on investment (ROI). When an expatriate returns from overseas without an onward assignment that utilizes their new skills, that situation can result in a demotivated employee, hinder knowledge transfer within the company, and increase the risk of the returned expatriate leaving the company (Nery-Kjerfve & McLean, 2012). Given that no company can guarantee that a position will be available once an expatriate assignment is completed, MNE leaders may want to explore creative approaches to build upon the skills and knowledge of their employees. Future research on repatriation ROI would add more to this discussion.

The population for this study included participants with experience working at U.S.-based companies. Future research may involve a population of MNEs that do not have a presence in the United States. Global corporate expansion plans and the concomitant need for expatriate employees may differ based on the location of the company headquarters. International expansion may be even more critical for MNE leaders when their business is headquartered in a country with a small domestic market. In addition, companies that are headquartered in a country where the majority of people are multilingual may have a different perspective on the hiring and selection process. Future studies would benefit from an examination of MNEs not based in the United States.

Findings from this research also identified a potential trend among MNEs in moving away from providing full expatriate packages and offering more local-plus arrangements. Several participants stated that their company was looking to offer a full expatriate package in only limited instances. One participant commented on the benefits of hiring a local executive when filling an overseas position. Several other participants noted that while their company leaders still wanted to assign someone from headquarters to fill critical overseas positions, the company leadership often preferred not to include all the perks of an expatriate package. To attract employees more cost-effectively, some company leaders have looked to adopt a local-plus package with a salary on par with a local employee and include a few additional incentives, such as health insurance or housing (Tait et al., 2014). Future research may focus on how limiting the expatriate perks alters how MNE leaders recruit for overseas assignments.

Concluding Statement

Selecting employees for expatriate assignments and predeparture training was the focus of this research-based study. Based on the findings from the two research questions that provided the framework for this study and from the comprehensive literature review, it was determined that leaders at small and mid-size MNEs have a variety of processes they follow for expatriate selection. The research in this study illustrated how hiring professionals seek to identify KSAOs, motivations, and the personal situations of the candidates being considered for overseas assignments. Likewise, both structured and informal training were critical considerations in predeparture training as a step to increase expatriate adjustment to their new working and living arrangements overseas.

The findings of this study may assist SME leaders in crafting a practical and simple framework for evaluating the abilities and behaviors of expatriate candidates. A reasonable response from MNE leadership might be how they can increase their effectiveness in identifying and selecting expatriates. Leadership can play an active role in nurturing a professional HR department, which could be an essential resource in expatriate selection. Leadership must demonstrate that commitment to using the skills of HR leaders to encourage adoption throughout the organization.

Regarding the impact of this study on the academic and educational profession, an enhanced understanding and appreciation of how SME leaders select employees for expatriate assignments and predeparture training could influence future research in global mobility. The impact of this research and future research on this topic could influence leaders at companies to reexamine the importance they place on their international strategies and how they select employees for expatriate assignments to implement those plans. When selecting an expatriate to fill a role to meet a company's strategic international goals, careful consideration should be given to the long-term impact of those decisions.

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APPENDIX A

Data Collection Interview Questions

The purpose of this study is to explore how hiring professionals understand and use competencies when selecting candidates for expatriate assignments and predeparture training. The findings generated by this study could be used to inform hiring managers at multinational SMEs regarding approaches for selecting candidates for expatriate assignments and predeparture training.

1. Selection Process

1. Describe the process in your company for selecting employees for international assignments.
2. How do you determine the non-technical requirements of an overseas assignment?
3. What role does the human resources department have in making the final decision?

2. Personality and Cultural Skills

4. How do you evaluate a candidate's ability to work in another culture?
5. What steps do you take to evaluate personality traits?

3. Motivation and Career Goals

6. Describe what questions you asked to determine motivations for working overseas.
7. How do you factor in past experiences in the evaluation process?
8. How do you determine whether an international assignment fits into long-term career goals?

4. Expatriate Failure

9. Can you describe a situation where you thought a candidate was not a good fit for an international assignment?
10. What procedures do you use to track the success or failure of an expatriate assignment?

5. Predeparture Training

11. Describe the process in your company for organizing training for employees about to be sent on an international assignment
12. Can you describe the resources your company has for predeparture training?
13. What factors do you consider in determining what predeparture training to provide?

6. Leadership

14. From your experience, what role does leadership have in the expatriate selection and training process?