




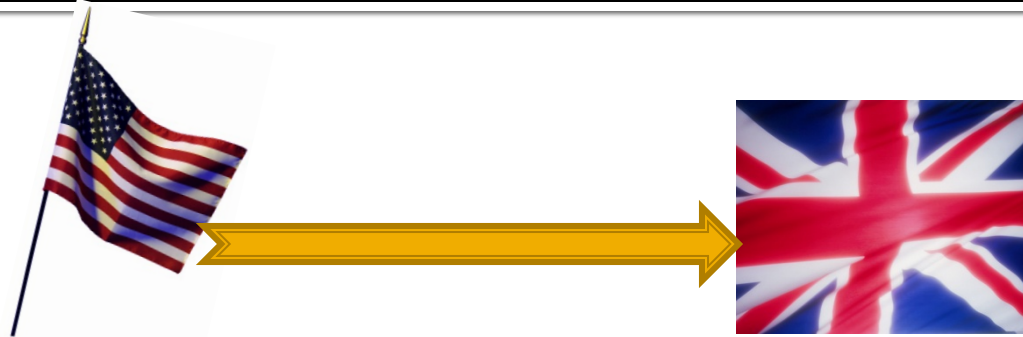
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# **A Strategy for Designing a Successful Expatriation Program from the US to the UK**

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# What is Expatriate? Expatriation?



- Often, it is necessary to send home country managers or employees to overseas locations
- These employees are called *expatriates*.
- The process of sending employees to the organization's overseas locations for a period of time is called *expatriation*.
- A person temporarily or permanently residing in a country and culture other than that of the person's upbringing or legal residence.
- Skilled professionals working in another country as opposed to locally hired staff.

# Value to Organization



- **Technical skills and relational abilities can be shared** between the parent company and the clients
  - putting a **"face"** to the company
- Employees (expatriate) and clients, normally at a distance, may have a meeting of the minds or more **"global understanding of the work"**
- May **increase productivity** if employees perspective of needs and opportunities in global location is improved
- The more complex the environment, the more the direct exposure **clarifies the working dynamics** for both the employee (expatriate) and the clients

# Indirect Costs of Failed or Poor Expatriation

- Having to **replace the expatriate** in the overseas assignment (Magnini & Honeycutt, 2003; Yu & Huat, 1995)
- Have to **return the expatriate back to their home country**
- Possibly **losing the person in that company or workplace** due to negative experiences encountered or dissatisfaction
- **Issues with clients**
- Family, spouse or relevant others issues affecting employee
- Increased absenteeism
- Lower productivity & lower profits
- **Over \$100,000 per person** (Naumann, 1993)
- Poor company image (Naumann, 1993).



# Purpose of Study



- To identify what factors contributed to a successful expatriation in an overseas assignment from the United States to the United Kingdom.
  - For the individual employee and related others
  - For the organization
- To suggest an implementation strategy for successful expatriation

# Methodology Used

- Qualitative case study
- Social media (LinkedIn used) to solicit expatriates
  - Eight individuals were contacted (three did not respond); n=5
- An Institutional Review Board Interview Protocol with 23 questions and related probes was created & approved
- Face-to-face and Skype, 45 to 60 minute interviews were used

# Findings



Self-Reporting of Expatriates	On a 5.0 Scale, 5.0 highest
Adaptability	4.0 (n=5)
Flexibility	3.4 (n=5)
Readiness for assignment	3.75 (n=2)
Cultural training prior to experience	11-18 hours (n=3) 20+ hours (n=2)
Expectations met with expatriation	4.0 (n=5)



\*with 5 being highest level

# Findings: How did you learn prior to your expatriation?



Discussed with friends, mentors, other employees

Researched schools

Met with future manager & UK directors

Did internet searches

Job role was similar to position in states

Had previous UK experience & had visited country

Had a brother who was an expatriate



"The CEO was my mentor. He was patient, he stretched me, and he supported me. He helped me with company politics. He was so valuable. If it wasn't for him, the experience may have been completely different."



# Findings: What were your expectations?

To travel

To learn international business & understand international growth of company

Experience new culture & meet new people

More family time

New adventures

Opportunities for change

A new learning experience & challenges

Possible promotion & personal development



# Findings: What were the disadvantages of expatriation?



BEFORE	Removed from family/friends
	Difficult to meet new people
	Break in spouse's career
	Commitment level high
AFTER	Tax implications
	Spouse lost years of work experience
	Tax equalization to meet high cost of living
	Not easy to assimilate once back in US



Relocation is Bi-Directional



*I was disappointed. I easily could have left the company within the first six (6) months of returning to the United States. The company did not seem to know where to put me. I returned to a lower level position with much less responsibility. My new role was not challenging. I was never asked for feedback about my overseas experience.*

# Findings: What training did you get & what needs to be added?

BEFORE	NEED TO ADD
Compensation differences	Need question & answer session
Relocation advice	Opportunities to review schools & housing before assignments via virtual tours
Language and cultural information	Create a relationship before expatriation adventure
Living arrangements	Place for person to return to US
	Person needs to be involved in creating training parameters

# Recommendations & Conclusions

- Need to test for employee adaptability levels ([http://ccaiaassess.com/CCAI\\_Tools.html](http://ccaiaassess.com/CCAI_Tools.html)) and provide training to increase adaptability (Avril, 2007; Downes & Hemmasi, 2001)
- Help expatriates be more self directed & **own their experience**
- Encourage **more spouse & family involvement** (Flynn, 1996; Harvey, 1985; Stone, 1991; Takeuchi et al. 2002; Tung, 1987; Bohlander & Snell, 2010)
- Set up learning contracts and transition plans for employees going to UK and returning to US
- Provide expatriate & family more detailed materials prior to assignment using virtual experiences and print materials (re schools, housing, cultural activities)
- Improve training programs for the expatriate & their family