

Andreas Weber's Assignment to New York: A Case Study in Expatriate Repatriation and Career Planning

Case 4.2

Günter K. Stahl

Mark E. Mendenhall

Andreas Weber's mind would not stop racing. Normally, an intense run in the evening had the effect of dissipating his worries, but tonight it was not working. The further he jogged along his standard route, the more he could not get out of his mind the letter he knew he must write tomorrow. "How had it all come to this?" he wondered. The thought triggered his mind back seven years to the initial event that had set in motion the process that led to his current trouble.

Andreas remembered the occasion clearly: Herr Goerner, the Managing Director, had walked into his office unannounced and asked him to participate in a company-wide international management development program. The Managing Director had gone on to explain that the program involved an international assignment with the intention of fostering the professional development of young, aspiring managers. After their overseas assignments, the trainees would constitute a pool of internationally experienced young managers with the potential for senior management positions at corporate headquarters. Andreas had accepted the offer on the spot, with pride. He had worked hard and had felt that his efforts had finally paid off.

His next memory was a jumble of classes that all had to do with issues related to globalization and overseas adaptation. Right after the program started, an unexpected vacancy had occurred in the New York branch of the bank, and Andreas was asked if he was interested in the position. He remembered calling his wife, Lina, to talk it over

and they had both quickly agreed to accept the position. Two months later he was transferred to New York.

Andreas remembered the day of his arrival in the U.S. as if it were yesterday. He had arrived at JFK Airport early in the afternoon. No one had come to pick him up, so he took a taxi and went directly to the New York branch of the bank. Once at the bank he was uncertain where to go. No one had told him who he should contact after his arrival, so he went straight to the head of the corporate finance department where he was supposed to work. When he entered his office and told the secretary that he was the new manager from Germany, she looked at her notebook, shook her head and told him that they were not expecting anybody. Confused, Andreas rushed to the HR department and soon found out that several misunderstandings had occurred. First, it was not the corporate finance department but the credit department that had requested his transfer. Second, contrary to what he was told in Frankfurt, there was only a non-management position vacant. They were looking for a credit analyst, basically the same job that he had done in Germany.

Andreas shook his head in reaction to the memory: "There I stood, in what was supposed to be my new office, three pieces of luggage on the desk, and wondering whether I should stay or take the next plane home!"

Why he decided to stay in New York he never quite could figure out; it had been simply a split second decision to make the best of the situation. The whirl of the next two months took over his memory: images of rushed days and nights trying to learn the ropes of a new office with new procedures, looking for a place to live, meeting new people, and of exploring new places raced through his consciousness. Then a clear memory intervened: the collage of memories of those first two months—Lina's arrival.

Lina and their three-year-old daughter, Anne-Marie, followed Andreas to New York two months after his arrival. They moved into a small house in the outskirts of New York. Lina knew New York pretty well, since she had lived there for 6 months as an intern in a New York-based reinsurance company; she arrived excited to re-discover her favorite cafés, art galleries, and museums.

Except for occasional attacks of homesickness, Lina was satisfied with her new life. The week after they had moved into their new house they received a dinner invitation from a young married couple that lived next door. To their surprise, their American neighbors quickly embraced the Webers. After two or three months they had gained several more new friends. Since there was no chance for Lina to get a working permit, she joined one of her new acquaintances in doing voluntary work at an art museum. Anne-Marie spent every second after-

daughter, Elena, was born. When the Webers stepped off the plane at JFK after their first home leave to Germany, it felt more like they were coming home than returning to a temporary assignment.

Professionally, things had also developed nicely. The New York branch of the bank had been right at the beginning of a boom-phase that lasted for several years. Throughout the boom, the bank's staff increased significantly. After eight months of working in the back office, Andreas was promoted to supervisor of a group of credit analysts. Then, one year after his first promotion, an unexpected vacancy occurred at the senior management level. The deputy head of the rapidly expanding corporate finance department had quit, and the bank had to fill his position with a manager who spoke fluent German, who was familiar with the finance departments of a number of German and other European companies, and who was instantly available. Andreas was asked if he was willing to extend his foreign service contract for another three years and accept the position as deputy head of the corporate finance department. After discussing it with Lina, Andreas accepted the offer.

Then, in the fifth year of his assignment, Andreas made another step upward in his career. His boss retired, and Andreas was promoted to head of the corporate finance department. He was now one out of five managing directors in the branch. When Andreas signed his new contract, it was agreed that he would stay with the New York branch of the bank for another three years and would then return to the bank's German headquarters in Frankfurt.

These were warm memories, memories that somewhat buffered the intensity of Andreas' emotions of frustration and anger at his current situation. But as he continued on his run, the warmth of the past dissipated into the turmoil of the present. He felt tense again, and the beauty of the park's foliage, resplendent in full autumn color, did nothing to ease the burden he felt. His current troubles came to the forefront of his mind and would not leave.

"It all started with that promotion," he muttered to himself. As head of the corporate finance department, Andreas' professional as well as his private life had unexpectedly changed. He was now responsible for a huge area—his business activities no longer concentrated on North American subsidiaries of foreign-based companies, but on their headquarters in Europe and East Asia. In the first six months of his new job Andreas had traveled more than 100,000 miles, mainly business flights to Europe. Due to Andreas' extensive travelling, Lina began to complain. She felt alone, and she began to be concerned about the children's education. Anne-Marie was now nine years old and had spent most of her life outside of Germany. Lina was also concerned about their oldest daughter missing out on a German high school education. Anne-Marie's

attending kindergarten, and except for the yearly home leave, she had no contact with other German children. Elena's German was quite poor. In fact, both Anne-Marie and Elena considered themselves Americans.

Lina had also become more and more discontent with her life as a housewife. Obtaining a working permit in the U.S. remained impossible, and it was more difficult for her to find new volunteer activities to quench her interests. To make things worse, Lina's father fell ill and died in that same year, before she could return to be by his side, leaving her mother alone. Andreas remembered the long conversations he had had with Lina during this time, many of which were by telephone from hotel rooms in far away places; and when he was home, in the quiet of their living room. Many times they had talked as they walked through the same park he was now running through.

"It was an extremely difficult situation," Andreas remembered, "not so much for the children, but for Lina and me. . . . From a professional standpoint, my assignment to New York was the best thing that could ever happen to me: I worked in the financial center of the world; I liked my job, the freedom of being away from the corporate bureaucracy, the opportunities to travel; I became a member of the senior management team at a very young age—impossible if I stayed in Germany. . . . Personally, we were also happy: the children felt at home in New York; we had quickly been embraced by our neighbors and the expatriate community; we had many friends here. . . . The question we continually wrestled with was: "does it make sense to give this up for the uncertainty of a return to Germany?" In principle, the answer would clearly have been: "no. But on a long-term basis, moving back to Germany appeared to be the best solution for our children and for Lina's mother. After all, we felt responsible for their future."

After several weeks of consideration and discussion, Lina and Andreas had decided to move back to Germany. This was about a year ago. Immediately after the decision had been made, Andreas had contacted the bank's corporate headquarters in Frankfurt and informed the human resource executive in charge of international assignments about his decision. Three weeks later Andreas received a short letter from him, stating that there was currently no position available in Germany at his level, but that chances were good to find a suitable return assignment within the next six months. Since then Andreas had had several meetings with managers at corporate headquarters, as well as with managers of domestic branches of the bank, but he had not been offered any reentry position.

Lina had become discouraged. She had told her mother immediately after their decision of their intention to return, but 8 months had passed, and her mother kept asking when they were coming back.

HR department in Frankfurt, in which he was informed that they had found a challenging return assignment as deputy head of a medium-sized branch of the bank in the Eastern part of Germany.

The memory of opening that letter and reading it, and the resultant emotions of anger, betrayal, shock, disbelief, and frustration all came back to him. He stopped running, and sat down on a park bench alongside the jogging trail.

"Not only will I earn little more than half the salary that I currently make in New York, I will not be able to use my skills and experiences that I have gained in this new position; I will be out of touch with all the important decisions being made at headquarters; and on top of that, I will be posted to one of the least attractive regions of Germany!" he thought, bitterly.

Andreas continued his thoughts: "The bank's HR policy—if there ever was any rational policy—punishes those who are really committed to the organization. . . . If you are an outstanding performer, they send you abroad. There is no career planning whatsoever. You are posted abroad, and if there just happens to be a job vacant when you return, you are lucky. If not, they let you wait and wait and wait, until you finally accept the most ridiculous job offer. . . . Our senior executives never cease to emphasize how important internationally experienced managers are to the company, but this is only lip service!" He began to wonder if he should accept the offer after all. He wondered if they should just stay in New York and make their home here. But then images of Lina, Lina's mother, Anne-Marie, Elena, and his parents, and all of their combined needs enveloped him.

Leaning back on the park bench, he blankly stared down the path that would lead out of the park and into the street, that in turn would lead him to his sub-division and then home.

PERFORMANCE APPRAISAL AND COMPENSATION

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