



# A holistic approach to expatriate success

Approach to  
expatriate  
success

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## Abstract

**Purpose** – The paper seeks to illustrate that a holistic selection, training, and organizational support approach encompassing variables such as the expatriate's family status, emotional intelligence, dietary and exercise habits, and his/her learning orientation is needed to enhance the odds of the expatriate's success.

**Design/methodology/approach** – The argument brought forth in this article is the product of a literature review drawing upon multiple streams of current research.

**Findings** – The holistic approach to expatriate selection, training, and organizational support detailed in this paper should be employed by multi-national hotel corporations.

**Practical implications** – This information should benefit hoteliers since the industry is currently experiencing a high rate of expatriate failure.

**Originality/value** – No research to date has addressed the issue of expatriate failure from this holistic viewpoint.

**Keywords** Expatriates, Hotels, Business failure, Hotel and catering industry

**Paper type** Conceptual paper

## Introduction

In the hotel business, a large portion of expatriate manager assignments end in failure (Magnini and Honeycutt, 2003; Yu and Huat, 1995). Expatriate "failure" or "turnover" occurs when managers either quit or return to their home country prior to the completion of their overseas tour (Naumann, 1993). Expatriate failure is a costly problem for multinational hotel corporations. Direct costs include the reassignment and remuneration package of the expatriate, plus the relocation and compensation of the expatriate's replacement. Indirect costs are more difficult to quantify, but encompass lost sales, unstable corporate image, and misguided employees.

In order for an expatriate to succeed s/he must be technically competent and adaptable. A past record of technical competence can be easily measured in the selection process. Technical competence in the hotel business can be demonstrated, for example, by maximizing revenue per available room (REVPAR), guest satisfaction and loyalty, and employee satisfaction and loyalty. Adaptability, on the other hand, is difficult to assess. Therefore, the purpose of this paper is to illustrate that a holistic selection and training approach encompassing variables such as the expatriate's family status, emotional intelligence, dietary and exercise habits, and his/her learning orientation is needed to enhance the odds of the expatriate's success. No research to date has addressed the issue of expatriate failure from this holistic viewpoint. To



accomplish this purpose, this article first discusses the expatriate selection process. Second, a holistic training program is detailed. Next, ongoing indicators of organizational support that correlate to expatriate success are explicated. Finally, managerial and research implications are offered.

### **Selection of the expatriate**

Before sending an employee abroad, it is imperative to consider all the aspects of this issue. Selection is where it all starts. The success of an expatriate depends first on how well the recruitment process is completed. The overriding key to operating successfully abroad is to select the right person to assign to a particular task. What differentiates those who successfully complete their assignments from those who return home early?

To answer this question, the resumé of the candidate must first be considered. One factor that can sometimes be portrayed through a resumé is the level of fluency that the candidate has with the foreign language (Peterson, 2002). In addition, the resumé can indicate the amount international experience of the person, and more specifically, if s/he has ever worked in the country that is in focus (Tye and Chen, 2005). It is pertinent to note that researchers generally consider previous international experience to be of importance to expatriates because foreign work experience typically teaches an individual the ability to generate strategies for adaptation in new situations (Tye and Chen, 2005). Finally, the third element that can be identified through the resumé is the technical competence of the candidate; that is to say his/her ability to efficiently perform the task that requires specific skills. For example, an operations manager in Doha, Qatar, would need a specific set of skills. Therefore, these technical characteristics should be outlined in the hotel firm's job position posting and can then be critiqued in the resume evaluation stage.

The resumé is a good starting point in a candidate search and can be useful in screening out unqualified applicants, but the selection process of the expatriate must evidently move beyond the resumé. Particular attention must be paid to personal characteristics that include the ability to adapt to different norms and modes of behavior, as well as a high tolerance for ambiguity (Tye and Chen, 2005). While the candidate must be technically qualified for the job, s/he may not possess the traits that are prerequisites necessary for successful cross-cultural adaptation. One particular trait that is necessary in order for an expatriate to adapt is called emotional intelligence (also termed emotional maturity) (Tracey and Shay, 1997). Emotional intelligence is defined as an array of capabilities, competencies, and skills that influence one's ability to cope with environmental demands (Salovey and Mayer, 1990). According to Tan *et al.* (2005, p. 8), in a broad sense, emotional intelligence encompasses:

- the ability to assess and manifest emotions;
- regulation of emotion in the self and in others;
- the capability to channel emotion to promote intellectual and emotional growth; and
- the capacity to generate emotions to assist problem solving.

At a more fine-grained level, emotional intelligence includes the following psychological and personality traits:

- *tolerance for ambiguity* – the expatriate must have the ability to function in a situation with unclear rules and parameters, and where things do not necessarily make sense;
- *low goal and task orientation* – the expatriate must not be obsessed with quick results because it can lead him/her to become frustrated;
- *open-mindedness* – the expatriate must be receptive to novel ideas and listen to others' points of view;
- *tolerance for difference* – the expatriate must have the ability to accept change and differences in others, and possess the ability to live in close proximity to people who may have fundamentally different habits;
- *communicativeness* – the expatriate must be able to communicate and express himself clearly;
- *empathy* – the expatriate must appreciate how others feel and show intellectual or emotional identification with them;
- *flexibility* – the expatriate must have the ability to consider alternative ways of doing things;
- *curiosity* – the expatriate must show a sense of adventure and willingness to do things differently;
- *warmth in relationships* – the expatriate must be social adaptable and possess a knack for socializing with new people in unfamiliar situations;
- *motivation* – the expatriate must be a self-motivator; and
- *self-reliance* – the expatriate must show a strong sense of self in a way s/he can deal with situations in which results are ambiguous.

Most of the emotional intelligence traits listed above can be assessed through the use of behavioral interviewing. A behavioral interview differs from a traditional interview in that behavioral interviews are comprised of:

- situational questions that pose hypothetical scenarios to which the respondent is asked how s/he would respond; and
- past behavior questions that ask the candidate to describe their actions when they faced particular circumstances at a past job (Barclay, 2001).

Therefore, questions asked in a traditional interview may include:

- What are your strengths and weaknesses?
- Why are you interested in working for us?

Conversely, questions asked in a behavioral interview are much more situation-based and behavior-based. For example, the items listed below could be used to elicit information regarding an expatriate candidate's emotional intelligence and personality traits necessary to succeed in an overseas assignment (see [https://www.quintcareers.com/sample\\_behavioral.html](https://www.quintcareers.com/sample_behavioral.html)):

- Describe a time when you were faced with a stressful situation that demonstrated your coping skills.

- Give me a specific example of a time when you used good judgment and logic in solving a problem.
- Give me a specific example of a time when you had to conform to a policy with which you did not agree.
- Tell me about a time when you had too many things to do and you were required to prioritize your tasks.
- Give me an example of a time when you had to make a split second decision.
- Give me an example of a time when you tried to accomplish something and failed.
- Give me an example of a time when you used your fact-finding skills to solve a problem.
- Describe a time when you set your sights too high (or too low).

After the completion of the behavioral interviewing, the selection process should then specifically hone in on the candidates ability to adapt. As previously stated, adaptability is a key driver of expatriate success (Powers, 1992; Stone, 1991; Tung, 1981). One indicator of a candidate's adaptability is his/her "learning orientation" (Magnini and Honeycutt, 2003). A learning orientation entails a preference to develop one's competence by acquiring new skills and mastering new situations (VandeWalle *et al.*, 2001). More specifically, a learning orientation involves a candidate's propensity to learn from experience, to seek opportunities to learn, to use and seek feedback to improve him or herself in the future (Magnini and Honeycutt, 2003). To gauge a candidate's learning orientation, the survey items contained in the following list can be used accompanied by Likert-type scales ranging from strongly agree to strongly disagree:

- The opportunity to do challenging work is important to me.<sup>a</sup>
- When I fail to complete a difficult task, I plan to try harder the next time that I work on it.<sup>a</sup>
- I prefer to work on tasks that force me to learn new things.<sup>a</sup>
- The opportunity to learn new things is important to me.<sup>a</sup>
- I do my best when I am working on a fairly difficult task.<sup>a</sup>
- I try hard to improve on my past performance.<sup>a</sup>
- The opportunity to extend the range of my ability is important to me.<sup>a</sup>
- When I have difficulty solving a problem, I enjoy trying different approaches to see which one will work.<sup>a</sup>
- It is worth spending a lot of time learning new approaches for dealing with hotel guests.<sup>b</sup>
- An important part of being a hotel manager is continually improving your management skills.<sup>b</sup>
- I put a great deal of effort in order to learn something new about managing.<sup>b</sup>
- It is important for me to learn from every management experience that I have.<sup>b</sup>
- Learning how to be a better manager is of fundamental importance to me.<sup>b</sup>

(In the above list, items marked “a” are adapted from Button *et al.*, 1996, and those marked “b” from Kohli *et al.*, 1998.)

Finally, to increase the likelihood of expatriate success, it is often necessary to involve the family of the candidate in the selection’s process. In fact, research indicates that a primary determinant of expatriate failure is the inability of the expatriate’s spouse to fit in her new surrounding (Flynn, 1996; Harvey, 1985; Stone, 1991; Takeuchi *et al.* 2002; Tung, 1987). The spouse often struggles abroad because the expatriate has a sense of belonging at the job site, but the spouse is often left with feelings of alienation. In addition, it is often the chore of the spouse to acclimate the children to school systems that are sometimes very different than the school systems in the home country. For these reasons, roughly one in four companies include the spouse in pre-selection interviews (Solomon, 1994). Including the spouse in pre-selection interviews, at least in the USA, is somewhat perilous from a legal perspective, which is why many companies choose to avoid the practice. Nevertheless, it should be communicated very clearly to the expatriate candidate that the following issues are associated with a high likelihood of failure abroad:

- responsibilities for aging parents;
- chemical dependencies on the part of anyone in the household;
- existence of learning disabilities in a child;
- behavioral problems in teenagers; and
- emotional instability of any family members.

Furthermore, the expatriate should be told that research strongly indicates that as the number and ages of the children increase the likelihood of expatriate failure also increases (Naumann, 1992).

### **Training of the expatriate**

Once the expatriate is selected, the next step is an effective training program. Training is necessary because in the hospitality business there is often great pressure to fill a position, and the perfect candidate who possesses technical competence, experience in the host country, the ideal emotional and family situation, and a high learning orientation is rarely (if ever) available. Therefore, training helps the expatriate understand the culture of the foreign destination and can further develop his/her learning-orientation (Porter and Tansky, 1999). Cross-cultural training benefits the expatriate by highlighting the differences that s/he will face in the foreign land. At the bare minimum, the training must provide the selected expatriate with coaching in the areas of business culture, etiquette, interpersonal communication, and conflict resolution.

There are three stages in a well-structured expatriate training program (Magnini and Honeycutt, 2003). These are described below.

#### *Stage I: training in the home country*

The first stage is training in the home country. This step should be brief because research indicates that cross-cultural training is most effective once the expatriate has arrived overseas (Mendenhall, 1999). Pre-departure training consists of providing the expatriate with basic knowledge that s/he will need immediately upon arrival. For

example, the expatriate must be aware of the cultural imperatives, which are the customs that must be recognized and adopted when in the host country. In Japan, for instance, s/he will have to know Japanese table etiquette (where most of the business meetings are conducted), and also how to dress conservatively, which is very important in the Japanese business culture. In addition to those mandatory habits, training in the home country must make the expatriate aware of the cultural adiaphoras, which are the customs in which participation is optional; for example, accepting an alcoholic beverage. Lastly, the expatriate must be informed of the cultural exclusives, which are the customs in which he should not participate. Often, religious customs fall into the category of cultural exclusives. If one is not Muslim, for example, s/he should not participate in certain rituals reserved for members of the religion. Also, in this initial stage of the training program, language training may be included if necessary for the assignment.

Next, pre-departure training should involve an explanation of what it means to have a learning orientation (Magnini and Honeycutt, 2003). That is, in Stage I training, the expatriate should be told that ambiguous situations will be inevitable during the foreign assignment and s/he therefore should view them as learning opportunities. More specifically, when confronted with a situation in which results are anything less than a clear success, rather than avoiding similar situations in the future, it is preferable to learn from the situation and develop a strategy for improvement. Communicating the importance of a learning orientation can be done through the use of role playing and through the use of internally produced instructional videos containing testimonials of successful expatriates or repatriates (Magnini and Honeycutt, 2003).

The final component of pre-departure training should include instructional guidance regarding diet and exercise. The expatriate should be told that s/he will likely experience a “honeymoon” stage in which the foreign culture is perceived as novel and exciting, but this honeymoon stage is typically followed by “culture shock”. Culture shock can be defined a stress-induced reaction to all the behavioral expectation differences and the accompanying uncertainty with which the individual must cope (Black and Gregersen, 1991, p. 462). More specifically, culture shock is primarily a manifestation of the stress that stems from uncertainty, frustration, and even anger (Sims and Schraeder, 2004, p. 78). Since culture shock is a stress-induced reaction, the expatriate should be instructed that regular exercise and a healthy diet can significantly enhance the body’s reaction to this stress. The expatriate should be taught that a number of studies support the correlation between fitness and mental performance (Neck and Cooper, 2000), the association between fitness and higher levels of energy and bolstered feelings of well-being (Goldsby and Neck, 2001), and the relationship between fitness and a reduction of anxiety and stress (Neck and Cooper, 2000). Since the expatriate’s stress tolerance is positively correlated with his/her performance (Holopainen and Bjorkman, 2005), s/he should be instructed to maintain a reasonable fitness schedule and a sensible diet. Sustaining a diet that is both nutritious and agreeable to his/her digestive system while in the host country is not as difficult as it once was due to the proliferation of food vendors that now sell through internet channels.

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*Stage II: training upon arrival in the host country*

The training process continues with training upon arrival in the host country. As previously stated, the expatriate will likely experience a brief “honeymoon” stage, quickly followed by culture shock. Therefore, to make his/her integration easier, it is important that we provide him/her with a continuation of the cross-cultural training that was received in the home country. During this second stage in the training process two training modes present themselves:

- (1) classroom-style training; and
- (2) CD-ROM training.

There are several drawbacks to classroom training. First, it is relatively expensive to pay a qualified instructor. Second, it is not always possible for expatriates to begin their assignments in groups; hence, the classroom training may be costly one-on-one training. Third, even if a group of expatriates do begin an assignment together, it is often difficult to determine a time slot in which the group can meet for training.

CD-ROM training can serve as a highly effective cross-cultural training mode for hotel expatriates. This mode of training is flexible and can be completed at the convenience of the expatriate. There are a number of well-respected expatriate CD-ROM training products currently on the market. In fact, some even allow the expatriate to create a personalized reference library on the CD. Nevertheless, from an intuitive perspective, a potential drawback of CD-ROM training is that it is the responsibility of the expatriate to utilize the CDs. Hence, it is important for the expatriate to possess a learning orientation.

Whether the hotel corporation opts to employ classroom training or CD-ROM training (or a combination of the two), this stage of the training process should serve as a means for the firm to enhance the likelihood of successful integration of the expatriate into the new environment. The impetus is to reduce the culture shock associated with being in the foreign country and to ease the assimilation process.

*Stage III: real-time training*

Real-time training, the third and final stage of the expatriate training program, may in fact be a key driver of expatriate success (Mendenhall and Stahl, 2000). It is highly unrealistic to even begin to assume that all cross-cultural situations can be covered in the previous two training stages. Even in a well-crafted training program, only a small portion of cultural idiosyncrasies can be addressed on an *a priori* basis. For example, even something as seemingly simple as exchanging business cards involves habits and rituals that vary dramatically from one country to the next (Cateora and Graham, 2005). Consequently, real-time training consists of giving the expatriate resources that s/he can turn to for information and advice as new (and often unanticipated) situations surface.

In real-time training, hotel corporations can pay local experts to serve as consultants. Often times these may be local-nationals who were educated in the USA. Also, there are quite often expatriate associations, embassy personnel and business groups that the expatriate can turn to for real-time support. Alternatively, perhaps nobody can relate better to a new expatriate than an experienced expatriate[1]. In other words, except for when the hotel company is penetrating a new market, there is typically the support provided by other expatriates in the hotel. In addition, another

source of real-time training is expatriate internet chat rooms. A simple internet search will reveal a host of free internet chat rooms designed by expatriates with the intent of helping one another confront and understand cultural issues. Whether the potential source of information is a local expert, an experienced expatriate colleague, or an internet chat room, the expatriate must, in fact, possess a learning orientation in order to seek-out real-time advice.

*Training for the family*

Finally, just like in the selection process, family members should not be overlooked. The expatriate's family should be invited to participate in each of the three training stages. Offering cultural and language training to the expatriate's family will enable the hotel corporation to improve the integration of all the members upon arrival. It will also reduce the likelihood of inappropriate or disrespectful behavior toward the locals due to a lack of knowledge of the culture. Family support groups may also aid the assimilation into the host culture. In a support group setting family members can discuss both their successes and frustrations and can exchange advice.

**Fostering a successful experience abroad through organizational support**

Several studies have shown convincing evidence to suggest that expatriate culture shock is influenced to a large degree by how the expatriate perceives and experiences organizational support once in the host country (Eisenberger *et al.*, 1990; Punnett, 1997; Sims and Schraeder, 2004). When sending an employee abroad, the goal of the hotel corporation should be to provide every reasonable tool to ensure success. While a well-structured training program goes a long way in demonstrating organizational support, several other factors such as open communication channels, proper performance measures, and appropriate financial incentives also foster a sense of organizational support.

Failure in expatriation can sometimes be traced to the lack of communication (Cateora and Graham, 2005). Communication between the home office and the expatriate can be seen as a valuable key for successful expatriation since it is a means of maintaining high levels of expatriate motivation. This link between open communication and motivation exists because communication is a form of procedural justice (Palmer *et al.*, 2000). Thus, it is the expatriate's perceptions of corporate justice that drive his/her motivation. Therefore, it is important in the expatriate's mind to know that his/her hotel operation is important, and in turn, to know what is happening at the headquarters. It is sometimes easy for those located at headquarters to suffer from "nearsightedness", and they should therefore be aware of this tendency and actively solicit open dialogue with the expatriate. In this dialogue, the odds of expatriate success can be enhanced if those in the home office stress the developmental value of the overseas assignment to the expatriate's career (Naumann, 1992).

In the past when the expatriate worked in his/her home country, the benchmark levels for performance criteria were relatively straight forward. In other words, if a REVPAR value of \$US90 was achieved in a certain market it was relatively easy to assess whether that was or was not an impressive figure. In the past several years, however, many hotel brands have been expanding into new international markets (Higgins, 2006). When a firm penetrates a new foreign market, benchmark levels for all performance criteria must be adjusted (Ohmae, 1999). While the new internationally

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adjusted benchmarks are being learned, the hotel expatriate has few (if any) indicators to reassure himself/herself that s/he is doing a good job. It is quite plausible for this performance ambiguity to create anxiety and self-consciousness on the part of the expatriate. Consequently, in this situation the firm's home office needs to manifest its support of the expatriate by providing him/her with other feedback regarding his/her work in the overseas position. For instance, the home office and the expatriate should work hand-in-hand in a programmatic effort to create and validate reliable performance measures that can be used to gauge future success.

In addition, designing a compensation system is a quintessential component of showing organizational support for the expatriate. Indeed, offering financial compensation to the expatriate for moving abroad can present both advantages and drawbacks that must be taken in consideration (Cateora and Graham, 2005). First, a compensation system is often seen as a source of motivation for the expatriate to accept the task to which s/he is assigned. It is important that the expatriate be rewarded by the company for sacrificing a part of his/her life by moving abroad. A recent trend in the area of expatriate compensation is to offer the expatriate a "basket of benefits" from which s/he can choose in order to design a customized compensation plan (Cateora and Graham, 2005). This flexible design is due to the fact that expatriates often have unique preferences. For example, some individuals prefer fringe benefits such as housing and vehicles as opposed to large salaries in order to circumvent high tax payments. Further, it is a well-known fact that bonus plans are common in hotel management. Due to the argumentation set forth in the previous paragraph, if an expatriate is taking an assignment in a newly entered market bonus plans should reflect "soft" indicators of performance (such as establishment of training and learning initiatives) as opposed to "hard" indicators (such as profitability).

### **Managerial implications**

Expatriate failure is a costly problem for multinational hotel corporations. It is well understood that in order for an expatriate to be successful s/he must be technically competent and must possess the ability to adapt to the foreign environment. In the selection process, the expatriate candidate's track record of technical competence is relatively easy to assess. Nevertheless, the expatriate's ability to adapt is more elusive. Therefore, this paper illustrates that a "holistic approach" should be utilized by multinational corporations to select and train expatriates. A holistic approach addresses factors such as the expatriate's family situation, the expatriate's diet and exercise habits, his/her emotional intelligence, and his/her learning orientation. In addition, once the expatriate has begun his/her assignment the home office should continue to show support to the expatriate in the form of adequate compensation, adjusting performance indicators for the foreign setting, and through open communication.

Also from a managerial perspective, it is important to understand that not all expatriates take assignments in difficult places[1]. For instance, an Austrian may take an assignment in Germany or Switzerland, or a Briton in the USA. Situations such as these are not likely to present an overwhelming amount of ambiguity. Therefore, hotel firms should understand that the more (less) cultural distance that exists between the home and the host county, the more (less) cross-cultural training that is required (Holopainen and Bjorkman, 2005; Naumann, 1992). In a similar vein, if a candidate with

experience in the host country can be selected, less training is required. Nevertheless, it is still recommended that the three stages of training outlined in this article be employed as the basic training framework regardless of circumstances. The level of detail and intensity can, however, be adjusted according to the situation at hand. Hence, information gathered in the selection process (e.g. resumé analysis, behavioral interviewing responses, and learning orientation survey results) can be used to assess an expatriate's training needs.

In the future, hotel corporations should also focus more attention on developing better measures of expatriate success and failure. In terms of success, hard (e.g. financial indicators) and soft (e.g. employee satisfaction ratings) should be developed and refined to fit specific geographic locations and business situations. In terms of failure, as stated at the beginning of this article, researchers currently consider expatriate failure to include any manager who quits or returns home prior to the completion of his/her assignment. This concept of failure is somewhat inaccurate because perhaps an expatriate quit an assignment because s/he was performing so well that s/he was hired away from the company by another firm. Or perhaps, the expatriate did complete his/her assignment, but with only marginal performance and the extent of his/her success is questionable. Consequently, multinational hotel firms would be well advised to derive more accurate measures of expatriate success and failure.

#### Note

1. We thank an anonymous reviewer for raising this point.

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