

ASSESSMENT INSTRUMENTS FOR THE GLOBAL WORKFORCE

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Spurred by the demands of economic globalization, the international relocation industry, and the increasingly multicultural workplace, assessment instruments have proliferated in the last decade. The increasing supply of instruments reflects, of course, the increasing importance of selecting appropriate people for international assignments or positions in multicultural work environments and preparing them for these unfamiliar circumstances. Because such positions often require competencies beyond the standard set of professional knowledge and skills needed for familiar first-culture work environments, international human resource professionals responsible for selection and development look for new tools to assess and enhance aptitude, awareness, and skills.

Now, there are dozens of commercially available and increasingly sophisticated instruments purporting to measure various aspects of intercultural adaptability or suitability; intercultural sensitivity, development, or competence; or work style and/or cultural values orientation. It has become increasingly difficult to keep up with what tools are available in the market, what they measure, and whether they are appropriate for particular needs.

This chapter discusses the various aspects of competence required for successful performance in the global environment, organizes commercially available instruments that attempt to measure some aspects of that competence

according to their appropriate application—selection or development—and describes several appropriate instruments in each category with respect to purpose and design, supporting research, presentation languages, source,

and other pertinent or unique attributes. Part 1 focuses on instruments applicable particularly to the selection process, while Part 2 focuses on instruments primarily designed for the development process.

PART 1: INSTRUMENTS FOR THE SELECTION PROCESS

◆ ***Global Competencies for Global Work***

Although a lot of research has examined the traits and skills associated with success in international assignments and, more recently, success in the multicultural workplace (one need not always leave home to experience a multicultural workplace), the selection and development process is still more of an art than a science. With respect to international assignments, there are so many variables affecting the outcome that predictability of success or failure is difficult. One must look at the personal situation of the candidate—single or married, with or without children, of what ages, separation issues from extended family or support group, point in career path, etc. Variables in the assignment itself include location (developed or undeveloped economy, urban versus rural setting, remoteness, degree of cultural difference and language challenge, climate, number of other expatriates at workplace and in the community, experience of the local workforce with foreigners, etc.) and the nature of the work (a technical versus a management focus, the relative importance of external relationship building with client, customer, local government, and community versus internal management, etc.).

So, there are many variables affecting the nature and the degree of challenge of an assignment. The fundamental question is, what factors (beyond technical competence) predict success in the global business

environment? *In general, the global workplace requires the ability to operate comfortably and effectively within a broad spectrum of difference—human, cultural, and environmental.* (These three categories, of course, overlap.) While research has identified attitudes, traits, and skills that make up this broad ability or competence, here is a short but reasonably comprehensive list:

- Action orientation (conscientiousness)
- Flexibility
- Openness (open-mindedness)
- Emotional stability
- Sociability (extraversion, agreeableness)
- Cultural empathy (cultural sensitivity, cultural intelligence)

Taken as universal across cultures, the first “big five” attributes (terminology sometimes varies) are transparent and make sense with respect to fostering comfort and competence in unfamiliar and diverse situations. One can argue that these items are traits that are not learned but rather part of one’s personality, their presence or absence appearing early in life. While the more personal traits like sociability and openness may be strengthened through life experience and perhaps coaching, in general such traits are not amenable to training.

Cultural empathy, however, differs from the rest. Research in social neuroscience confirms ever more strongly that empathy, the major component of cultural sensitivity,

is learned (Goleman, 2006) and that cultural sensitivity plays a primary role in intercultural competence.

What is the role and importance of cultural sensitivity or empathy? If we consider cultural difference as expressed in the workplace, five factors have been revealed to be of considerable importance through the research of Geert Hofstede (2001). Hofstede identified the dimensions of individualism (individual vs. collectivism), power distance (hierarchical vs. participative orientation), masculinity (task vs. relationship orientation), uncertainty avoidance (structure vs. risk orientation), and long-term orientation (pragmatic future vs. conventional historical or short-term orientation). These differences in attitudes and behaviors are profound, change slowly over time, and are more related to national or ethnic culture than to organization, profession, age, or gender. Such differences need to be recognized, understood, acknowledged, and managed in the global work environment. When the need arises to work in a cultural environment where values very different to one's own are the norm, it may be necessary (depending on a variety of factors) to adapt to these differences. This is where cultural sensitivity and empathy become an important part of intercultural competence.

◆ ***Global Intercultural Competence: A Cluster of Attitudes, Knowledge, and Skills***

The successful global manager, whether expatriating, simply working in a multicultural environment, or supporting a multicultural workforce, exhibits a complex global competence that includes cultural empathy. This empathy consists of four related components:

- Knowledge of one's own and other pertinent cultures
- Recognition of specific differences between cultures
- Understanding of how culture influences behavior in the workplace
- Ability to adapt to and/or manage differences, as expressed in business structures, systems, and priorities, within multicultural work environments

Underlying these components is *attitude*—namely, openness to difference and a willingness to suspend judgment. As referenced in other chapters of this text, this requires a movement in stages from a natural ethnocentrism toward an acceptance of otherness typically called ethnorelativism (Bennett, 1993). Acceptance increases sensitivity to cultural difference and leads to conscious *knowledge* of the particularities of one's own and other pertinent cultures. From this knowledge base one begins to observe the impact of cultural differences on the workplace. One then develops the *skill* of adapting to or managing specific differences in order to operate successfully in another cultural milieu or in a multicultural situation. Cultural empathy thus leads to the development of *global intercultural competence*—the emotional, cognitive, and behavioral skill set required for successful participation in global business.

Whether the task is selecting employees to fill sensitive positions or development planning for managers, there are increasingly sophisticated tools for measuring and developing various aspects of intercultural competence. It is crucial to understand the new skills needed for management of the global workplace and to be able to measure and develop these. The instruments that follow can be extremely valuable in these processes.

♦ *Tools for the Selection Process: Adaptability*

When selecting candidates for international or multicultural assignments from a pool of personnel of roughly equal technical qualifications, it is useful to assess both adaptability/suitability and intercultural competence. Ideally candidates are offered the confidential opportunity to complete instruments relating to both categories in order to self-select into or out of consideration for a specific assignment. Often, however, human resources personnel elect to review the results from these instruments. (Be aware that use of such instruments in employment decisions has important legal implications, since they are generally not job specific.) In either case, there are several instruments designed to assess adaptability or intercultural competence, or some combination of both. We will first look at adaptability instruments.

Adaptability instruments were the first assessment tools developed in response to the globalization of business and the increase of international assignments. Some have been available for more than 30 years, and new ones continue to be developed. Most of these instruments are based primarily on a self-assessment of a set of personality traits (listed previously under Global Competencies for Global Work) associated with adaptability to new situations. Here are six quite different instruments that assess variations of these traits, or these plus other competencies. Four of these tools below were developed in the United States, one in Canada, and one in the Netherlands:

- Cross-Cultural Adaptability Inventory (CCAI)
- International Assignment Profile (IAP)
- International Personnel Assessment tool (iPASS) *Canada*

- Overseas Assignment Inventory (OAI)
- Multicultural Personality Questionnaire (MPQ) *Netherlands*
- Self-Assessment for Global Endeavors (SAGE)

CROSS-CULTURAL ADAPTABILITY INVENTORY (CCAI)

The CCAI, developed by Colleen Kelley, PhD and Judith Meyers, PsyD, was copyrighted in 1987. It is designed to provide information to an individual about his or her potential for cross-cultural effectiveness. Both versions consist of 50 questions that assess four components of cross-cultural adaptability. Initial statistical studies indicated that the CCAI had sufficient reliability and validity for a training instrument. While some recent research has questioned the validity of the four-factor structure, other research has correlated it with emotional intelligence. The CCAI remains a convenient tool for the self-selection process because of its simplicity and low cost. The instrument can be purchased in any quantity and does not require certified administrators. It can be used as a stand-alone instrument for self-selection for international assignments, as part of a larger selection battery, for pre- and post-testing, or as part of cross-cultural training. There is a follow-up training tool called the CCAI Action-Planning Guide that suggests actions to address factors assessed as weak, and there is also a Facilitator's Guide and Cultural Passport to Anywhere for use in group debriefs. The Multi-Rater Kit provides 360° feedback with three observers. The CCAI is available in two versions: a self-scoring paper and pencil instrument that provides immediate turnaround and an online version that provides the scoring and a printed feedback report.

INTERNATIONAL ASSIGNMENT PROFILE (IAP)

It is common knowledge that family adjustment is the most significant threat to the success of an international assignment. The IAP, from International Assignment Profile Systems, is a unique and technologically sophisticated tool designed primarily as a preparation instrument to assist those selected for international assignment to prepare well for their destination. Its goal is to make a good match between the employee, the family, and the particular destination. However, the tool has selection implications; if the IAP report indicates that the required support is too onerous or extensive, the manager and employee may want to reconsider the timing or destination. The IAP is a multifaceted process that gathers and organizes extensive information about a family anticipating international assignment and integrates it with information about the destination to which they are being sent. It also provides the means of archiving this information for learning and future research. (The IAP recognizes the client company and can be customized to convey specific information; it can be modified, customized, or “branded” to fit a client’s or vendor’s specific requirements.)

The IAP report summarizes family information in a comprehensive, easily understood format identifying core issues that need to be addressed prior to departure, such as the following:

- “Pleasant surprises”—essential or important things to the family that will meet or exceed expectations in the destination
- Destination information on spousal employment and spousal impact
- Traits and behaviors that may hinder or enhance cultural adjustment

The two-part questionnaire can be completed in approximately 35 minutes per section for employee and spouse. The survey is secure and does not have to be completed in one sitting. The report is typically generated within 24 hours but can be received more quickly if necessary. Although information on how to use and interpret the IAP is available from IAP Systems, the IAP requires no special training.

INTERNATIONAL PERSONNEL ASSESSMENT TOOL (iPASS)

With Part 2 still under development, iPASS is already a comprehensive behaviorally based tool to assess intercultural effectiveness and readiness for undertaking an international assignment. Designed for HR and recruiting specialists in the international field, iPASS is being developed by the Centre for Intercultural Learning, Foreign Affairs Department, Canada. In contrast to most intercultural assessment instruments, iPASS is intended to provide a strong, reliable basis for HR and management in employment decisions. Part 1, available now in French and English, is the Behavioral-Based Interview Kit, providing a reliable intercultural competency interview. Based on 35+ years of research, the interview kit employs seven Competencies for Intercultural Effectiveness: cultural adaptation, knowledge of the host country, sensitivity and respect, network and relationship

- Critical planning issues and adjustments that must occur to ensure assignment success
- A list of “sleeper” issues that could emerge post-arrival to compromise the assignment
- Information on “back home” issues that may affect the assignment

building, intercultural communication, intercultural leadership, and personal and professional commitment. Each competency has four levels of mastery. A client chooses three competencies necessary for success in the intended assignment as well as the level of each competency required for adequate functioning. Based on this, a customized interview kit is then prepared for the iPASS-certified HR/recruiter specialist with a set of comprehensive questions for a 2-hour interview appropriate to the selected competencies and levels; this set also includes questions on motivation, interest, and attitude toward cultural difference.

Part 2, a 40-question Situational Judgment test based on actual intercultural conflict situations, will provide an additional screening tool when completed. Qualification for use of the Behavioral-Based Interview Kit is obtained through a 3-day training session delivered for 8 to 12 people wherever required.

OVERSEAS ASSIGNMENT INVENTORY (OAI)

Developed by Michael Tucker, currently of Tucker International, the OAI was the first major instrument assessing suitability for an international assignment. Available since the early 1970s (first version designed for the U.S. Navy) the self-awareness questionnaire examines 14 attributes and motivations found crucial for successful adaptation to another culture as well as motivations for accepting or wanting an international assignment. Studies of validity and reliability have been conducted at intervals on various populations since its implementation, and the OAI has undergone significant redevelopment. It continues to be well known and respected in the relocation industry.

The questionnaire is conveniently available online, although the reports (two versions; one to the candidate and another to HR or management) are furnished in hard copy only and may take several weeks for delivery. Reports are self-explanatory and do not require certified administrators. The OAI is appropriate for self-selection and may be helpful for HR in its decision-making process. The OAI provides a limited basis for professional development in preparation for an international assignment, and its debrief can become a major component of cultural training.

MULTICULTURAL PERSONALITY QUESTIONNAIRE (MPQ)

Karen I. Van der Zee, PhD, and Jan Pieter Van Oudenhoven, PhD (University of Groningen, the Netherlands) developed the Multicultural Personality Questionnaire of 91 items as a multidimensional instrument to measure intercultural effectiveness. Developed in 1998 and revised in 2000, the MPQ measures five traits: cultural empathy, open-mindedness, social initiative, emotional stability, and flexibility. Designed primarily for self-assessment, it can be used as well for risk assessment as part of the selection process. While personalities are generally considered stable rather than learnable competencies, the more social dimensions—open-mindedness, social initiative, and cultural empathy—have been shown to increase as a result of training or living abroad.

SELF-ASSESSMENT FOR GLOBAL ENDEAVORS (SAGE)

The SAGE was developed by Paula Caligiuri, PhD, who is currently director of the Center for Human Resource Strategy at

Rutgers University. Available since 1997, the instrument was designed to assist individuals and families as a confidential tool in their decision process of whether to accept an international assignment. The tool's three sections address issues of personality (six factors), motivation, and family. Validity and reliability are supported by considerable research. The SAGE is available in two versions—one for the employee and a second for the accompanying partner—online in English with the report immediately available for reading online or via printing. (Paper-based versions are also available in French, Japanese, Mandarin, and Taiwanese. These versions are not merely translation/back translations but recreations of the instrument using cultural resources to assure the appropriateness of the questions.) The first two sections are scored with ranges marked in green, yellow, or red as indications of one's suitability and readiness for assignment. The third section is not scored but is designed to facilitate the family conversation necessary for an informed decision about seeking and accepting an assignment. The SAGE is designed to facilitate the self-selection process, but the report can also be used to structure a pre-departure or post-arrival cultural training program.

◆ *Tools for the Selection Process: Competence*

While the dividing line is blurry because many instruments have more than one focus, there are a number of instruments designed more for the assessment of competencies than for adaptability. The OAI and iPASS above contain elements of this, while the CCAI, SAGE, and MPQ are primarily focused on adaptability traits (and life situation, in the case of the SAGE). The next four disparate instruments focus

more on the complex skills essential for effective functioning in international assignments.

- Global Candidate Assessment (GCA 360°)
- Intercultural Development Inventory (IDI)
- Intercultural Readiness Check (IRC) *Netherlands*
- Survey on Intercultural (Relocation) Adaptability (SIA, SIRA)

GLOBAL CANDIDATE ASSESSMENT (GCA 360°)

Very different from the tools discussed above, the Global Candidate Assessment is an elaborate three-step online assessment process developed by Aperian Global that involves self-assessment and assessment by up to 10 colleagues, supervisors, and subordinates on the same items (not identified in the available description), including written commentary on selected questions about the candidate's attitudes and abilities. While the assessment examines workplace behaviors and adaptability, the instrument does not focus specifically on intercultural competencies as defined above. Once the surveys are completed, the tool generates an instant compilation, the Candidate Summary Report, which is viewable by the client assessment administrator. This includes overall scores, a combined visual display, a gap analysis indicating difference between the candidate's and others' scores, and a compilation of written comments. Administrative functions can be performed by Aperian or by a client HR person. Step 2 is a 3-hour interview with the candidate conducted by an Aperian consultant. This may include the spouse or partner as well and covers motivation, challenges, relocation issues, career impact, personal

strengths/weaknesses, and self-rating of adaptability, all resulting in a verbal summary report to client HR. Step 3 is a candidate meeting with client HR to debrief the process and indicate current level of commitment to an international assignment. As an optional Step 4 after the candidate has been accepted, the candidate and key colleagues in the new position can take the GlobeSmart Assessment Profile (GAP), which compares a profile of the candidate with that of the selected colleagues and generates a report to each suggesting various behavior modifications to enhance collaboration. (No information on research support was offered.)

INTERCULTURAL DEVELOPMENT INVENTORY (IDI)

The IDI, covered thoroughly in Chapter 16, is a theory-based instrument developed by Mitchell Hammer, PhD, and Milton Bennett, PhD, that measures intercultural sensitivity as conceptualized in Bennett's Development Model of Intercultural Sensitivity (DMIS 1986, 1993). First developed in the mid-1990s, the recently revised 50-item instrument measures people's reaction to cultural difference along a developmental six-stage scale of cognitive structures or "worldviews" reflecting increasing intercultural sensitivity or competence. These worldviews range from denial and defense through minimization to acceptance, adaptation, and integration, with the first three labeled as ethnocentric and the last three as ethnorelative. Intercultural competence minimally requires development into the acceptance/adaptation stage of intercultural sensitivity. The IDI is supported by impressive reliability and validity studies and can be used with confidence in both the selection process and developmental planning, where it predicts the kind of intervention most effective for development according to the revealed stage of intercultural sensitivity. It is

equally applicable for measuring the intercultural competence of work or leadership teams (as an average) and for planning further competence development.

The IDI is available as a paper and pencil instrument or online in nine languages: Chinese, English, German, Italian, Japanese, Portuguese, Spanish, Korean, and Russian. While quite inexpensive to purchase, it must be debriefed by a certified interpreter.

INTERCULTURAL READINESS CHECK (IRC)

The Intercultural Readiness Check was developed in 2002 by Ursula Brinkman, PhD, of Intercultural Business Improvement in the Netherlands. Focused entirely on learnable skills crucial to effective intercultural interaction, the IRC examines the following four competencies: intercultural sensitivity, intercultural communication, building commitment, and preference for certainty (defined as the "ability to manage the greater uncertainty of intercultural situations"). Reliability and validity research was conducted on an international business population of Europeans, Americans, and others. Studies show high reliability (reconfirmed based on a population of more than 2,600 individuals) and sufficient validity to make the IRC a useful instrument for specific developmental training on any of the four competencies. Research continues on the instrument, and scores can be compared to a large database of more than 7,000 respondents. The questionnaire can be accessed online, but results must be presented by a licensed intercultural consultant. The tool can be used before entering a multicultural environment or during an international assignment, and the results provide an excellent basis for building a development plan and ongoing coaching.

*SURVEY ON INTERCULTURAL
(RELOCATION) ADAPTABILITY
(SIA & SIRA)*

From Grovewell LLC, SIA and SIRA are online 360° assessment instruments for global leadership or relocation candidates. For global leadership candidates, the SIA assesses seven skills/qualities that facilitate successful adaptation to global realities: flexibility, nonjudgmentalness, interest in different views and values, awareness of others' feelings, attention to relationships, responding well in unclear situations, and self-confidence. The 360° process (up to 12 raters) also assesses 20 behaviors that undermine relationships with diverse counterparts. For global relocation candidates, the SIRA adds a self-assessment (not 360°) for the candidate and separately for the spouse or partner of motivations, concerns, and expectations around long-term living and working in an unfamiliar environment. The Feedback Report of these instruments is provided directly and solely to the user, who is advised to share results with HR or management. While no certification is required for the administration of these instruments, a separate manual plus phone consultation is provided to HR and EAP professionals in contracting firms.

◆ *Conclusion: Part I*

Part I describes 10 varied instruments in support of the selection process for international assignments or any entry into the multicultural workplace, with respect to both adaptability and intercultural competence. These were selected from a larger pool for various reasons including design, research support, proven utility, and application to varied needs. As a final comment, users of selection instruments are often concerned about their reliability and validity. It is important to understand that, although many of these instruments are well supported by significant research, the linking of their results to the probability of assignment success is problematic since such instruments (with the exception of iPASS and GCA 360°) are not job specific in their design. That is, the need for adaptability and intercultural competence varies greatly with the job and the business and living environments. Therefore, results of these instruments (again with the exception of iPASS, GCA 360°, and, to some extent, the IDI) should not be used as the sole or even the primary basis of employment decisions.

Part 2 below describes another set of instruments primarily suited for the development of intercultural competence.

PART 2: INSTRUMENTS FOR THE DEVELOPMENT PROCESS

◆ *Tools for the
Development Process:
Intercultural Awareness*

The contrast of cultures through the lens of value dimensions has been inspired by intercultural research from Florence Kluckhohn & Fred Strodtbeck in the 1950s through Edward Hall in the 60s and 70s and

Geert Hofstede and his protégé Fons Trompenaars (with Charles Hampden-Turner) in the 80s and 90s, plus the large value surveys such as the World Values Survey, Shalom Schwartz's work in Europe, and most recently the seminal publication of *Culture, Leadership, and Organizations: The GLOBE Study of 62 Societies* (House, Hanges, Javidan, Dorfman, & Gupta, 2004). This contrast has provided a research-supported,

practical means of comparison in which values can be predictably linked to patterns of behavior in a variety of situations. Such information forms the basis of the knowledge component of intercultural competence and can be invaluable in the preparation for an international assignment, working in a multicultural environment, or leading a global team. It is no surprise, then, that a number of assessment instruments have been developed to enable people to understand their own cultural value preferences and compare these with core values of other cultures to understand the challenges these differences might present in the work environment. Below are descriptions of five instruments (one from the United Kingdom and one from the United Arab Emirates) with a focus on cultural values and their impact on how we work.

- Argonaut Assessment (AA) UK
- Cultural Mapping and Navigation Assessment Tool (CMNAT) U.A.E.
- Cultural Orientation Indicator (COI)
- Culture in the Workplace (CWQ)
- Peterson Cultural Style Indicator (PCSI)

ARGONAUT

Developed by Coghill & Beery International in the United Kingdom, ArgonautOnline is actually a suite of cross-cultural e-learning tools that includes an assessment instrument. The Argonaut Assessment (AA) instrument, available in English only, employs a 20-minute questionnaire involving 12 dimensions (communication, conflict, problem solving, space, use of time, time spans, fate, rules, power, responsibility, group membership, and tasks) to produce a graphical map allowing comparison of the learner's self-perception, home culture, and target cultures from a list of more than 50 countries. This

contrastive mapping provides a basis for the formation of "personal strategies for international success." Results from the AA instrument can be combined with other online learning tools including personalized feedback and interactive tutorials. Access to the AA is gained through accreditation as a trainer or coach to use the ArgonautOnline tool suite.

CULTURAL MAPPING AND NAVIGATION ASSESSMENT TOOL (CMNAT)

Created by Knowledgeworkx in the United Arab Emirates, this tool employs a 72-question online inventory to produce a personal profile that details preferences on 12 bipolar cultural dimensions affecting workplace behaviors: growth, relationship, outlook, destiny, context, connecting, expression, decision making, planning, communication, accountability, and status. The CMNAT profile is incorporated in the second level of a four-level program (3 days of training for Levels 1–3 and ongoing coaching toward intercultural excellence in Level 4). The goal is the growth and application of intercultural intelligence to achieve intercultural excellence within multicultural teams. The assessment tool is also integrated with other (noncultural) assessment instruments (the Diamond Profiling Process) as part of intercultural leadership consultation. There is a 5-day intensive program for certification in the delivery of Levels 1–3 of the Cultural Mapping & Navigation Program suite of products; certification is granted only after delivery of the first program within 2 months of completing the accreditation training.

CULTURAL ORIENTATIONS INDICATOR (COI)

The COI is a Web-based self-reporting instrument developed by TMC (Training Management Corporation) that assesses

individual preference within 10 cultural dimensions (environment, time, action, communication, space, power, individualism, competitiveness, structure, and thinking) drawn from the social science research mentioned above, plus other contributors, such as Edward Stuart, Milton Bennett, and Stephen Rhinesmith. The 108-question inventory yields a profile of preferences along a series of continua—17 in all, as several of the 10 dimensions have sub-continua. The profile of preferences (restricted to work-related behaviors and situations) enables comparison to other team members and national norms, allowing “gap analysis” and the coaching of strategies for bridging differences. Group or team aggregate reports are also available. The COI is also integrated into the Cultural Navigator, an online learning portal, and other programs offered by TMC. Test construction has been psychometrically validated, but one should note that not all the 10 dimensions have been equally researched globally. (On the other hand, having additional dimensions is useful to distinguish national cultures, which may appear quite similar with respect to a few dimensions.) The COI is available in Chinese, English, French, German, Italian, Japanese, and Spanish. The COI is supported by the *Cultural Orientations Guide* (4th edition), which supplies a context for understanding the instrument and its applications.

CULTURE IN THE WORKPLACE QUESTIONNAIRE (CWQ)

Based on the research and developed with the support of Geert Hofstede (2001), the CWQ, recently revised and now fully Web enabled, provides individual cultural profiles incorporating five cultural dimensions: individualism, power distance, certainty (uncertainty avoidance), achievement (masculinity), and time orientation (long-term orientation). The revised and more

powerful version of the instrument was released in December 2006 by ITAP International, which licenses the Culture in the Workplace Questionnaire from Professor Hofstede and has the worldwide exclusive rights to its use. Profiles can be compared to average national values (established through the research of Hofstede and others) of 60 countries.

The 60-question inventory is completed online, resulting in nine-page personal reports, which can be immediately downloaded and printed by the user or saved for later distribution by a facilitator. The individual profile illustrates the user’s score on each dimension in comparison with national averages of up to 15 selected countries. The report explains each dimension, lists the impact on work style of values at either end of the dimension (such as individual versus group orientation), and illustrates in a scenario the misunderstanding and conflict typical of interaction between individuals holding different orientations. It also provides specific analyses on the user’s score on each dimension and the implications of the differences between the user scores and the comparison country scores.

The CWQ can be used with individuals or groups and also provides team reports for printing or download. Group averages can be compared in PowerPoint slides to numerous countries’ average values, and the scores of individual members of the group can be confidentially compared with respect to each dimension, which is very useful for global teams. For both user and team reports, users or facilitators have a choice of how the data is graphically displayed, either in horizontal or vertical bar charts. Clients can also add special demographic fields so that, for example, data can be analyzed by location of multiple users.

The CWQ assists in the following:

1. Understanding how to work more effectively with people from different cultures

2. Harnessing the diversity of teams for greater effectiveness and productivity
3. Developing a common conceptual base and vocabulary for understanding and managing team diversity
4. Coaching executives with global responsibilities or with employees from different countries
5. Conducting cultural audits—e.g., determining the cultural preferences of classroom participants in different locations for tailoring instructional designs

CWQ profiles must be requested and debriefed by trainers or consultants certified in CW profile interpretation.

PETERSON CULTURAL STYLE INDICATOR (PCSI)

The PCSI, designed by Brooks Peterson of Across Cultures, Inc., consists of a 20-question online inventory that generates a five-dimensional profile (fifth dimension added in 2004). The dimensions are hierarchy/equality, direct/indirect, individuality/group, task/relationship, and risk/caution. One's profile is comparable to 70 country "norms" (chosen scores based on comparing various studies), with strategic recommendations for increasing business success. Research supporting the instrument is discussed on the Web site, which includes a list of corporate clients. The PCSI, designed as a stand-alone instrument, can be accessed immediately online for a fee, including the comparison of one's profile with other countries and suggestions for bridging gaps based on one's score. Peterson has also authored a book (*Cultural Intelligence: A Guide to*

Working With People From Other Cultures, Intercultural Press, 2004).

♦ *Tools for the Development Process: Intercultural Coaching*

It is important to note that two of the tools introduced in Tools for the Selection Process: Competence (above) are equally suitable for the development process, particularly in a coaching environment. These are the Intercultural Readiness Check and the Intercultural Development Inventory.

The IRC yields a self-assessment of development with respect to four complex skills. In the debrief of the personal profile, a participant is advised of potential pitfalls and provided practical suggestions for development. The participant then creates, in collaboration with an intercultural trainer or coach, a plan for applying strengths and addressing weak points, which can be carried out with or without continued coaching.

The explanatory material provided with an IDI profile also contains descriptions for each of its scales, which list behaviors or attitudes associated with particular scores, the strengths associated with these, and the developmental tasks. Again with the help of an intercultural coach, a user can create and implement a developmental plan.

Here are three more instruments, developed in the United Kingdom and intended to be used developmentally. The first two instruments focus on adaptability and workplace behaviors, while the third incorporates values and workplace behaviors.

- The International Profiler (TIP)
- Global View 360°
- The Spony Profiling Model (SPM)

THE INTERNATIONAL PROFILER (TIP)

TIP, developed by WorldWork Ltd., in the United Kingdom, is a Web-based questionnaire and feedback process, available in English, German, French, and Italian, to assess the development needs of managers and other professions for international work. It is based on a set of 10 competencies (with 22 associated skills, attitudes, and areas of knowledge) derived from intercultural research and the practical experience of international professionals. The competencies are openness, flexibility, personal autonomy, emotional strength, perceptiveness, listening orientation, transparency, cultural knowledge, influencing, and synergy. TIP is an online psychometric inventory of 80 questions requiring about 45 minutes and generating a scored report (a hefty Feedback Book) for the certified consultant and client that provides structured feedback in terms of the energy, emphasis, and attention the user typically brings to a competency set. The feedback session, face-to-face or by telephone, consists of a structured discussion of the report with respect to the user's present or future international challenges. The intent is to identify three or four qualities requiring greater energy in the future. This results in a completion of a Personal Development Plan by the user entailing developmental areas, expected benefits from the development, and a S.M.A.R.T. action plan. The licensing process, required in order to employ TIP, provides a coaching manual.

GLOBAL VIEW 360°

Global View 360° is a panoramic version of the TIP providing feedback from 6 to 10 international colleagues, clients, friends, etc. who have observed the user in international

contexts. It employs a reduced questionnaire (55 questions) focusing solely on the 10 key competencies and provides a gap analysis in the feedback report of the difference between the level of importance given to selected behaviors as compared with the perceived level of performance. Two free fields allow for open-ended commentary. The Global View 360° can be administered totally by its subject.

THE SPONY PROFILING MODEL (SPM)

The SPM is a unique integrated online instrument offered by FutureToBe in the United Kingdom that combines aspects of cultural values and work style instruments with 360° reporting on communication style (three work colleagues). It can be used to produce individual, team, and organizational culture profiles using the same concepts and frameworks, thereby providing consistency, rigor, and integration between the development of individuals, the building of teams, and the strategic alignment of organizations. Developed over 8 years of research and testing in Britain and France by Dr. Gilles Spony at the Cranfield School of Management, the SPM incorporates the work of cross-cultural psychologist Shalom Schwartz as well as the research of Geert Hofstede to produce profiles of work style preferences. These are graphically displayed on a values framework of two perpendicular universal axes: the vertical RELATIONSHIP axis of Self-Enhancement versus Consideration for Others and the horizontal TASK ORIENTATION axis of Group Dynamics versus Individual Dynamics. This results in a profile of 12 attitudinal orientations that yield 12 operational styles with a total of 36 subdivisions. The individual profile is

then overlaid on a cultural values map to understand how work style may fit into or clash with various national cultures. The 230 questions of the work style questionnaire require about 45 minutes, while the communication style questionnaire for colleagues takes about 15 minutes. Because of the SPM's sophistication and complexity, accreditation in its use requires a 3-day training plus 1 day of assessment to use the instrument to a professional standard with respect to individuals, teams, and organizations. Candidates for accreditation are preferred to be holders of a Certificate of Competence in Occupational Testing (Level A) from the British Psychological Society and/or to have experience of other management models.

♦ *Conclusion: Part II*

The five value orientation tools described in *Tools for the Development Process: Intercultural Awareness* all incorporate the concept of behaviors (generally in a business context) differing rather predictably according to deeply held cultural preferences on values spectra that have been extensively researched globally over the last 50+ years. The instruments differ with respect to the value dimensions they employ, but they all produce personal profiles for comparison with other individuals and group or national averages. Such instruments can be powerful teaching tools for the knowledge component of intercultural competence, both before and during an assignment or while in a multicultural team; they provide a structured comparative basis for intercultural training and can also be used for coaching.

The two instruments described in *Tools for the Development Process: Intercultural Coaching* both look at workplace behaviors,

one from an adaptability perspective and the other from a cultural values perspective. These tools lend themselves less to training and more to a coaching process.

♦ *Assessment Instruments for the Global Workforce: Conclusion*

The increasing demands of globalization raise the stakes of the cultural due-diligence process, both in the selection of appropriate personnel for sensitive positions in the multicultural workforce both at home and abroad and in employee preparation for intercultural demands of these assignments.

In making employment decisions with intercultural implications, no assessment instrument, by itself, can replace a thorough and systematic selection process including job-specific performance evaluation, interviews with candidates, colleagues, superiors, direct reports, and family (in the case of international assignments). On the other hand, with the availability of the instruments described above, it is equally inexcusable to make such decisions without the support of an appropriate intercultural assessment tool.

Whether one intends to do any task in the following list, or affect any other situation involving a need to select for or further develop intercultural competence, there are competitive choices among the sophisticated and powerful assessment tools described in this chapter to assist in that task:

- Help an employee or family decide whether to accept an international assignment
- Gather significant information for HR and management to assist in an culturally sensitive employment decision

- Choose the most culturally competent manager from a pool of candidates to lead a virtual multicultural team
 - Determine the intercultural competence of a work group or leadership team
 - Prepare a manager for an international assignment or a multicultural leadership position
 - Prepare a team for work with a specific cultural group
 - Coach an international transferee or the leader of a multicultural team
 - Provide developmental input to a multicultural team
3. How can assessments like the ones described in this chapter assist in preparing an individual for an expatriate assignment?
 4. How can some of the assessments described in this chapter be used to measure the effectiveness of an international assignment or study abroad?

I encourage you to investigate further those that seem most relevant to your needs.

◆ Discussion Questions

1. Why is it powerful to be able to quantitatively assess one's level of intercultural competence?
2. Describe cultural empathy.

◆ References

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