

## Mapping the Content Domain of Global Leadership Competencies

ALLAN BIRD

Studies of newly emerging phenomena often transition through several phases. The first is characterized by wonder-tinged curiosity accompanied by an effort to find labels and names to describe a phenomenon. When myriad observers are exploring simultaneously, they are likely to come up with different names or focus on different aspects of the phenomena, assigning unique descriptors. Transition to the next phase occurs when the observers become “groundskeepers” and set about pruning the labels and ordering the descriptions. But the newly formed garden doesn’t flourish until borders are established and distinctions are made among plants.

From the early 1990s forward, a growing number of scholars have studied global leaders and attempted to delineate the competencies that are critical to their success. Reviews of this literature (Bird & Osland, 2004; Jokinen, 2005; Mendenhall, 2001a; Mendenhall & Osland, 2002; Osland, 2012; Osland et al., 2012; Saltzman, 2014) found that social scientists have delineated over 200 competencies that influence global leadership effectiveness; however, many of these competencies overlap conceptually and are often separated only by semantic differences (Jokinen, 2005; Osland, 2012).

Unfortunately, further progress in delineating the relationships among various competencies within the global leadership competency literature will be difficult without first bringing some order to the global leadership garden. Building on the strong foundation provided in Chapter 3, in this chapter we offer an organizing framework. To avoid unnecessary duplication, we will refer primarily to models, competencies, and research addressed previously. Nevertheless, we refer the reader to Chapter 3 for more detailed discussion of the specific models and competencies.

A decade previously, Mendenhall and Osland (2002) documented this trend of proliferation when they identified 56 different competencies. Since then, there has been a nearly four-fold explosion in competencies. Their initial efforts at cultivating and ordering the garden of global leadership consisted of grouping the many dimensions into six broad categories, reflecting the type of competency—traits and values, cognitive orientation, and so forth (see [Table 4.1](#)).

[Table 4.1 The Terrain of Global Leadership Constructs](#)

| <i><b>Cross-Cultural Relationship Skills</b></i> | <i><b>Traits and Values</b></i> | <i><b>Cognitive Orientation</b></i> | <i><b>Global Business Expertise</b></i> | <i><b>Global Organizing Expertise</b></i> | <i><b>Visioning</b></i>                     |
|--|---------------------------------|-------------------------------------|---|---|---|
| Building Relationships                           | Inquisitiveness and Curiosity   | Environmental Scanning              | Global Business Savvy                   | Team Building                             | Articulating a tangible vision and strategy |
| Cross-Cultural Communication Skills              | Continual Learner               | Global Mindset                      | Global Organizational Savvy             | Continuity Building                       | Envisioning                                 |
| Ability to emotionally connect                   | Accountability                  | Thinking Agility                    | Business Acumen                         | Organizational Networking                 | Entrepreneurial Spirit                      |
| Inspire, Motivate                                | Integrity                       | Improvisation                       | Stakeholder                             | Creating Learning                         | Catalyst for Cultural                       |

|                                |                        |                            |                      |                             |                               |
|--------------------------------|------------------------|----------------------------|----------------------|-----------------------------|-------------------------------|
| Others                         |                        |                            | Orientation          | Systems                     | Change                        |
| Conflict Management            | Courage                | Pattern Recognition        | External Orientation | Architecting and Designing  | Catalyst for Strategic Change |
| Negotiation Expertise          | Commitment             | Cognitive Complexity       | Results-Oriented     | Global Networking           |                               |
| Empowering Others              | Hardiness              | Cosmopolitanism            |                      | Strong Customer Orientation |                               |
| Managing Cross-Cultural Issues | Ethical Maturity       | Managing Uncertainty       |                      | Business Literacy           |                               |
| Social Literacy                | Results-Oriented       | Local vs. Global Paradoxes |                      | Change Agency               |                               |
| Cultural Literacy              | Personal Literacy      | Behavioral Flexibility     |                      |                             |                               |
|                                | Tenacity               |                            |                      |                             |                               |
|                                | Emotional Intelligence |                            |                      |                             |                               |

Source: Adapted from Mendenhall, M., & Osland, J. "Mapping the Terrain of the Global Leadership Construct." Paper presented at the *Academy of International Business*, San Juan, Puerto Rico, June 29, 2002.

Consideration of the six categories raises several questions about the organizing structure. For example, the six categories are not of the same qualitative type or conversely, conceptually overlap. Skills are qualitatively different from values. Some types of expertise may overlap with certain types of cognitive orientation, the latter of which may be a consequence of expertise or vice versa.

Three years after the Mendenhall and Osland effort, Jokinen (2005) sought to order the field by reviewing the literature and synthesizing competencies into three broad "layers," as presented in [Table 4.2](#). The *Fundamental Core* consisted of those predispositional personality competencies that provided a foundation on which other competencies could stand. *Mental Characteristics* constituted those attitudes, cognitive skills, and processes that aided information processing and mental functioning. Finally, *Behavioral Skills* encompassed that broad set of competencies that supported effective action. A careful consideration of the layers suggests some categorical ambiguity (e.g., knowledge is not behavior). Similarly, *Optimism*, though included in the *Mental Characteristics* layer, is usually understood to be a personality characteristic and so more likely fits into the *Fundamental Core* range. A broader critique of the Jokinen conceptualization is that it is overly focused on within-person and interpersonal competencies, leaving business and organizational capabilities largely unaddressed.

In a study of global leadership competencies in education, Saltsman (2014) adopted an alternative approach to integration and synthesis of the myriad competencies that others have previously identified. He undertook a qualitative meta-analysis of 70 individual studies that address, in one form or another, identification of global leadership competencies. He identified 522 competencies, which he subsequently combined with a set of 239 education leadership competencies gleaned from a second meta-analysis. These were combined in a third meta-analysis, which led to a final sorting process that generated 61 distilled competencies.

[Table 4.2 Jokinen's Synthesis of Global Leader Competencies](#)

| <i>Layers of Competencies</i> | <i>Competencies</i>                                |
|-------------------------------|--|
| <b>Behavioral Skills</b>      | Social skills                                      |
|                               | Networking skills                                  |
|                               | Knowledge  |
|                               | Optimism   |
|                               | Self-regulation                                    |
|                               | Motivation to work in an international environment |
| <b>Mental Characteristics</b> | Social judgment skills                             |

|                         |  |
|-------------------------|--|
| <b>Fundamental Core</b> | Empathy<br>Cognitive skills<br>Acceptance of complexity and its contradictions<br>Self-awareness<br>Engagement in personal transformation<br>Inquisitiveness |
|-------------------------|--|

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Source: Jokinen, T. (2005) Global leadership competencies: A review and discussion. *Journal of European Industrial Training*, 29(3): 199–216

In the ensuing years since Jokinen’s integrating and synthesizing effort, the field has expanded further, with researchers proposing new competencies and suggesting new organizing frameworks. In the following section, we review these efforts—both theoretical and empirical—and propose a general organizing scheme.

## Organizing the Global Leader Competencies

To comprehend the proliferation of identified global leader competencies we reviewed theoretical and empirical studies published from 1993 to 2016. The first serious work on global leadership incorporating an organizing framework and competencies was Rhinesmith’s 1993 volume. The most recent publication was that of Hassanzadeh, Silong, Asmuni, and Whahat (2015). Over this twenty- three-year time period, 42 refereed journal articles, book chapters, or volumes presented more than 200 separate competencies associated with global leadership. The list of publications and their attendant competencies are shown in [Table 4.3](#).

Although Rhinesmith (1993) and Yeung and Ready (1995) preceded it by several years, Brake’s (1997) volume is the first to suggest a set of competencies and a clearly defined organizing framework. Brake proposed three groupings of competencies—*Business Acumen*, *Relationship Management*, and *Personal Effectiveness*. Subsequently, several others have suggested groupings that follow a similar pattern. For example, Rosen and associates (2000) identify four “literacies.” However, their set of sixteen competencies can largely be grouped into the three categories that Brake roughly defines. Similarly, Bird and Osland (2004), which they extend in Osland & Bird, (2008), propose what they call a global leadership pyramid, with four levels, but again the groupings that emerge can easily be sorted into a three-category set. Other works, for example, Kets de Vries and Florent-Treacy (1999), McCall and Hollenbeck (2002), Goldsmith and associates (2003), or Gitsham (2009) don’t identify “umbrella” labels to order group competencies. Nevertheless, each of these, as well, lend themselves to a grouping roughly consistent with Brake’s formulation. To that end, we propose three categories of competencies—*Business and Organizational Savvy*, *Managing People and Relationships*, and *Managing Self*. We discuss each of the three, as well as the specific competencies that fall within their purview in subsequent sections.

Before moving on, however, it is worthwhile to point out several other conclusions that can be drawn from the list of competencies presented in [Table 4.3](#). First, scanning the columns and rows, it is apparent that global leadership competencies span a range of qualitatively different types. There are *predispositional characteristics of personality* (e.g., inquisitiveness, optimism, conscientiousness, extraversion); *attitudinal orientations* (e.g., cosmopolitanism; appreciating cultural diversity; results orientation); *cognitive capabilities* (e.g., cognitive complexity, intellectual intelligence, embrace duality); *motivational inclinations* (e.g., motivation to learn; tenacity); *knowledge bases* (value-added technical and business skills, global knowledge, business acumen); and *behavioral skills* (building partnerships and alliances, cross-cultural communication, boundary spanning). In other words, (and as noted in [Chapter 3](#)) the range of competencies identified is extensive and wide-ranging in type. Global leadership is a multifaceted phenomenon, and the competencies associated with performing at a high level are multifaceted as well.

[Table 4.3 Competency Distribution Across the Three Primary Categories of Global Leadership Competency](#)

| <i>Authors</i>          | <i>Business &amp; Organizational Acumen</i>  | <i>Managing People &amp; Relationships</i> | <i>Managing Self</i>   |
|-------------------------|--|--|--|
| Rhinesmith, (1993)      | Intellectual Intelligence<br>Business Acumen   | Emotional Intelligence<br>Cultural Acumen  | Cognitive Complexity<br>Cosmopolitanism<br>Personal Management     |
| Wills and Barham (1994) |  |  | Cognitive Complexity<br>Emotional Energy<br>Psychological Maturity |
| Yeung, and Ready (1995) | Articulate a tangible vision<br>Catalyst for strategic change<br>Catalyst for cultural change<br>Results Orientation<br>Customer Orientation<br><b>Business Acumen *</b> | Being able to empower others               |  |

|   |  |   |   |
|---|--|---|---|
| Brake (1997)                                      | <ul style="list-style-type: none"> <li>• Depth of Field</li> <li>• Entrepreneurial Spirit</li> <li>• Stakeholder Orientation</li> <li>• Total Organizational Acumen</li> </ul> <p><b>Relationship Management</b></p> <ul style="list-style-type: none"> <li>• Change Agency</li> <li>• Community Building</li> </ul>   | <p><b>Relationship Management</b></p> <ul style="list-style-type: none"> <li>• Community Building</li> <li>• Cross-Cultural Communication</li> <li>• Influencing</li> </ul>   | <p><b>Personal Effectiveness</b></p> <ul style="list-style-type: none"> <li>• Accounting</li> <li>• Curiosity &amp; Learning</li> <li>• Maturity</li> <li>• Thinking Agility</li> </ul>   |
| Spreitzer, McCall and Mahoney (1997)              | Business Knowledge   | Interpersonal Skills<br>Cross-cultural Skills   | <p>General Intelligence</p> <p>Commitment</p> <p>Courage</p> <p>Ability to learn from experience</p> <p><b>Inquisitiveness</b></p> <p><b>Exhibit Character</b></p> <ul style="list-style-type: none"> <li>• Emotional connection</li> <li>• Integrity</li> </ul> <p><b>Embrace duality</b></p> <ul style="list-style-type: none"> <li>• Capacity to manage uncertainty</li> <li>• Ability to balance tension</li> </ul> <p>Global Mindset</p> <p>Tenacity</p> <p>Life Balance</p> <p>Resilience to Stress</p> |
| Black, Morrison and Gregersen (1999)              | <p><b>Savvy</b></p> <ul style="list-style-type: none"> <li>• Business Savvy</li> <li>• Organizational Savvy</li> </ul>   |   |   |
| Kets de Vries & Forent-Treacy (1999)              | <p>Visioning</p> <p>Designing &amp; Aligning</p> <p>Outside Orientation</p>  | <p>Energizing</p> <p>Team Building</p> <p>Rewarding &amp; Feedback</p> <p>Emotional Intelligence</p> <p><b>Social Literacy</b></p> <ul style="list-style-type: none"> <li>• Pragmatic Trust</li> <li>• Urgent Listening</li> <li>• Constructive Impatience</li> <li>• Connective Teaching</li> <li>• Collaborative</li> </ul> <p>Individualism</p> <p><b>Cultural Literacy</b></p> <ul style="list-style-type: none"> <li>• Proud Ancestor</li> <li>• Respectful Modernizer</li> <li>• Culture Bridger</li> </ul> |   |
| Rosen, Digh, Singer, and Philips (2000)           | <p><b>Business Literacy</b></p> <ul style="list-style-type: none"> <li>• Chaos Navigator</li> <li>• Business Geographer</li> <li>• Historical Futurist</li> <li>• Leadership Liberator</li> <li>• Economic Integrator</li> </ul> <p><b>Cultural Literacy</b></p> <ul style="list-style-type: none"> <li>• Inquisitive Internationalist</li> <li>• Global Capitalist</li> </ul> |   | <p><b>Personal Literacy</b></p> <ul style="list-style-type: none"> <li>• Aggressive Insight</li> <li>• Confident Humility</li> <li>• Authentic Flexibility</li> <li>• Reflective Decisiveness</li> <li>• Realistic Optimism</li> </ul>  |
| McCall and Hollenbeck (2002)                      | <p>Able to deal with complexity</p> <p>Value-added technical and business skills</p>   | Cultural interest and sensitivity   | <p>Open-minded and flexible in thought and tactics</p> <p>Resilient, resourceful, optimistic and energetic</p> <p>Honesty and integrity</p> <p>Stable personal life</p>   |
| Goldsmith, Greenberg, Robertson, & Hu-Chan (2003) | <p>Developing Technical Savvy</p> <p>Building Partnerships &amp; Alliances</p>   | <p>Appreciating Cultural Diversity</p> <p>Sharing Leadership</p>  | Thinking Globally   |
| Bikson, Treverton, Moini and Lindstrom (2003)     | <p>Substantive depth related to the organization's primary business processes</p> <p>Strategic international understanding</p>   | <p>Managerial ability, with an emphasis on teamwork and interpersonal skills</p> <p>Cross-cultural understanding</p>  |   |
| Bird and Osland (2004; 2008)                      | <p><b>System Skills</b></p> <ul style="list-style-type: none"> <li>• Influence Stakeholders</li> <li>• Lead Change</li> <li>• Span Boundaries</li> <li>• Build Community</li> <li>• Architecting</li> <li>• Global Knowledge</li> </ul>  | <p><b>Interpersonal Skills</b></p> <ul style="list-style-type: none"> <li>• Mindful Communication</li> <li>• Create &amp; Build Trust</li> <li>• Multicultural Teaming</li> </ul>   | <p><b>Threshold Traits</b></p> <ul style="list-style-type: none"> <li>• Integrity</li> <li>• Humility</li> <li>• Inquisitiveness</li> <li>• Resilience</li> </ul> <p><b>Attitudes &amp; Orientations</b></p> <ul style="list-style-type: none"> <li>• Global Mindset</li> <li>• Cognitive Complexity</li> <li>• Cosmopolitanism</li> </ul> <p><b>System Skills</b></p>  |

|  |   |   |  |
|--|---|---|--|
| Moro Bueno and Tubbs (2004)                    |   | Communication Skills<br>Respect for Others<br>Sensitivity   | <ul style="list-style-type: none"> <li>• Make Ethical Decisions</li> <li>Motivation to Learn</li> <li>Flexibility</li> <li>Open-mindedness</li> </ul>  |
| Alon and Higgins (2005); Alon et al. (2016)    | Business Cultural Intelligence  | Emotional Intelligence<br>Cultural Intelligence   |  |
| Tubbs and Schulz (2006)                        | <p><b>Understand the big picture</b></p> <ul style="list-style-type: none"> <li>• Demonstrating knowledge of the whole organization</li> <li>• Using systems theory</li> <li>• Effectively utilizing technology</li> <li>• Demonstrating ethical practices</li> </ul>   | <p><b>Attitudes are Everything</b></p> <ul style="list-style-type: none"> <li>• Showing Inclusiveness</li> <li>• Demonstrating appropriate confidence in self and others</li> </ul>   | <ul style="list-style-type: none"> <li>Self-Concept</li> <li>Extraversion</li> <li>Agreeableness</li> <li>Emotional Stability</li> <li>Openness to Experience</li> <li>Locus of Control</li> <li>Need for Achievement</li> <li>Overcoming Adversity</li> </ul> |
| Abbe, Gulick and Herman (2007)                 |   | Cultural Awareness<br>Cognitive Complexity<br>Cross-Cultural Schema<br>Empathy<br>Interpersonal Skills<br>• Flexibility   | <ul style="list-style-type: none"> <li>Need for Closure</li> <li>Cognitive Complexity</li> <li>Initiative</li> <li>• Self-Regulation</li> </ul>  |
| Osland, Bird, Osland and Oddou (2007)          | Strategic Thinking<br>Oscillation between detail and big picture<br>Boundary Spanning<br>Stakeholder Management   | Skilled “People Reading”<br>Creating & Relying on Trust   | <ul style="list-style-type: none"> <li>Tolerance of Ambiguity</li> <li>Inquisitiveness</li> <li>Creative Problem Solving</li> </ul>  |
| Gitsham (2008)                                 | <p><b>Context</b></p> <ul style="list-style-type: none"> <li>• Environmental Scanning</li> <li>• Understand environmental risks &amp; social trends</li> </ul> <p><b>Complexity</b></p> <ul style="list-style-type: none"> <li>• Responsive to Change</li> <li>• Finding Creative Solutions</li> <li>• Balancing short- and long-term considerations</li> <li>• Understanding Interdependence</li> </ul> <p>Interact with external clients from other countries</p> <p>Interact with internal clients from other countries</p> <p>Develop a strategic business plan on a worldwide basis</p> <p>Manage a budget on a worldwide basis</p> <p>Manage foreign suppliers or vendors</p> <p>Manage risk on a worldwide basis</p> | <p><b>Connectedness</b></p> <ul style="list-style-type: none"> <li>• Understand Actors</li> <li>• Build Relationships</li> </ul> <p>Work with colleagues from other countries</p> <p>Often speak another language</p> <p>Supervise employees of different nationalities</p> <p>Negotiate in other countries or with people from other countries</p> <p>Extraversion</p> | <p><b>Complexity</b></p> <ul style="list-style-type: none"> <li>• Flexibility</li> <li>• Learn from Mistakes</li> </ul>  |
| Caligiuri (2006); Caligiuri and Tarique (2009) |   |   | <ul style="list-style-type: none"> <li>Openness to Experience</li> <li>Conscientiousness</li> </ul>  |
| O’Brien and Robertson (2009)                   | Foresight<br>G-localism<br>Intuition  | Presence  | <ul style="list-style-type: none"> <li>Authenticity</li> <li>Agility</li> <li>Resilience</li> <li>Self-mastery</li> <li>Creativity</li> </ul>  |
| Van Dyne, Ang and Livermore (2009)             |   | <b>Cultural intelligence</b>  | <ul style="list-style-type: none"> <li>• Motivational CQ</li> <li>• Cognitive CQ</li> <li>• Metacognitive CQ</li> <li>Propensity to Act</li> <li>Absorptive Capacity</li> </ul>  |

|  |                             |   |   |
|--|-----------------------------|---|---|
|  |                             |   | Propensity to take risks<br>Future Orientation    |
|  |                             |   | <b>Perception Management</b>                      |
|  |                             |   | • Nonjudgmentalness                               |
|  |                             |   | • Inquisitiveness                                 |
|  |                             |   | • Tolerance of Ambiguity                          |
|  |                             |   | • Cosmopolitanism                                 |
|  |                             |   | • Interest Flexibility                            |
|  |                             |   | <b>Self Management</b>                            |
|  |                             |   | • Optimism  |
|  |                             |   | • Self-Confidence                                 |
|  |                             |   | • Self-identity                                   |
|  |                             |   | • Emotional Resilience                            |
|  |                             |   | • Non Stress Tendency                             |
|  |                             |   | • Stress Management                               |
| Bird, Mendenhall,<br>Stevens and Oddou<br>(2010)                                   |                             | <b>Relationship Management</b>                  |   |
|  |                             | • Relationship Interest                         |   |
|  |                             | • Interpersonal Engagement                      |   |
|  |                             | • Emotional Sensitivity                         |   |
|  |                             | • Self Awareness                                |   |
|  |                             | • Social Flexibility                            |   |
| Bücker & Poutsma<br>(2010)   |                             | Cross-Cultural Competence                       | Global Mindset                                    |
|  |                             | Intercultural Sensitivity                       | Cultural Intelligence                             |
|  |                             | Intercultural Competence                        |   |
|  |                             | Communication Skills                            |   |
|  |                             | Flexibility to operate in<br>different cultures |   |
|  |                             | Motivational Skills                             |   |
|  |                             | International Leadership<br>Skills              | Empathy   |
|  |                             | People Skills                                   | Trustworthy                                       |
|  |                             | Adaptable Leadership Skills                     | Creative  |
| McCarthy (2010)  | Building a shared vision    | Team Management Skills                          | Tolerant  |
|  | Translating Vision          | Coaching and guidance<br>Skills                 | Authentic   |
|  | Change Management skills    | Language Skills                                 | Courageous  |
|  | Strategic Skills            | Team Spirited                                   | Efficient   |
|  | Virtual Work Skills         | Being personally interest in<br>team members    | <b>81 total (and attributes)</b>                  |
|  |                             | Delegation Skills                               |   |
|  |                             | Computer Skills                                 |   |
|  |                             | Conflict Management Skills                      |   |
|  |                             | Cultural Self-Awareness                         |   |
| Gundling, Hogan,<br>and Cvitkovich<br>(2011)                                       | Frame Shifting              | Results Through<br>Relationships                | Inviting the Unexpected                           |
|  | Expand Ownership            | Develop Future Leaders                          | Core Values and Flexibility                       |
|  | Adapt and Add Value         | Influence Across Boundaries                     |   |
|  | Third Way Solutions         | Boundary Spanner                                |   |
| Butler, Zander,<br>Mockaitis, and<br>Sutton (2012)                                 |                             | Bridge Maker                                    |   |
|  |                             | Blender   |   |
|  | <b>Intellectual capital</b> | <b>Social capital</b>                           | <b>Psychological capital</b>                      |
| Javidan and Walker<br>(2012)   | • Global Business Savvy     | • Intercultural Empathy                         | • Passion for Diversity                           |
|  | • Cognitive Complexity      | • Interpersonal Impact                          | • Quest for Adventure                             |
|  | • Cosmopolitan Outlook      | • Diplomacy                                     | • Self-Assurance                                  |
| Witt (2012)  | Inspirational               |   | Integrity   |
|  | Visionary                   |   | Performance-Oriented                              |
|  |                             |   | Decisive  |
|  |                             |   | <b>Positive Psychological Capital</b>             |
|  |                             |   | • Hope (Cross-cultural hope)                      |
|  |                             |   | • Optimism (Cross-cultural<br>optimism)           |
|  |                             |   | • Self-Efficacy (Cross-cultural<br>self-efficacy) |
|  |                             |   | • Resilience (Cross-cultural<br>resilience)       |
|  |                             |   | Self-Awareness                                    |
| Youssef and<br>Luthans (2012);<br>Reichard, Dollwet,<br>& Louw-Potgieter<br>(2013) |                             |   |   |
| Rana, Murtaza,   |                             |   |   |

|  |   |  |   |
|--|---|--|---|
| Rana, Murtaza, Noor, & Inam-uddin (2013)       | Knowledge About Culture   |  | Self-Awareness<br>Self-Regulation<br>Cognitive skills   |
| Sakchalathorn and Swierczek (2014)             | <p><b>Global leader competencies</b></p> <ul style="list-style-type: none"> <li>• Global Approach</li> <li>• Global initiative</li> <li>• Global Process</li> <li>• Global Customer Orientation</li> </ul> <p>Creative Thinker<br/>Capacity to create a safe and balanced environment<br/>Capacity to create organizational learning systems<br/>Strategic Thinker<br/>Visionary<br/>Politically Aware<br/>Systems Aware<br/>Problem-Solver<br/>Negotiator<br/>Change Agent<br/>Conflict Manager<br/>Manager—General<br/>Manager—Human<br/>Resources<br/>Leader<br/>Service/Customer-minded<br/>Global Mindset</p> <p>Wisdom<br/>Knowledge<br/>Business Savvy<br/>Global Capitalist</p> | <p><b>Global mindset</b></p> <ul style="list-style-type: none"> <li>• Collaboration</li> <li>• Positive Attitude</li> </ul> <p><b>Cultural intelligence</b></p> <ul style="list-style-type: none"> <li>• Cross-Cultural Understanding</li> <li>• Adaptability</li> </ul> <p>Respect<br/>Empathy<br/>Listening Skills<br/>Communication skills<br/>Communication Skills—<br/>Cross- Cultural<br/>Multitasker<br/>Quality Focus<br/>Relationship builder<br/>Team Builder<br/>Manager—Cross-Cultural<br/>Team Member<br/>Social Awareness<br/>Cultural Awareness and diversity<br/>Language Skills<br/>Computer Skills</p> | <p><b>Global executive competencies</b></p> <ul style="list-style-type: none"> <li>• Multiple Perspectives</li> <li>• Flexibility</li> <li>• Openness</li> <li>• Passion to Excel</li> </ul> <p><b>Global leader competencies</b></p> <ul style="list-style-type: none"> <li>• Balance</li> </ul> <p>Extrovert<br/>Personal Style<br/>Low Neuroticism<br/>Humility<br/>Maturity<br/>Patience<br/>Confidence<br/>Courage<br/>Integrity/Honesty/Ethics<br/>Curiosity/Spirit of Adventure<br/>Hardiness<br/>Tolerance of Ambiguity<br/>Flexibility/Adaptability<br/>Openness/Open-Minded<br/>Risk-take/Entrepreneurial Spirit<br/>Energetic<br/>Optimistic<br/>Persuasive/Charisma</p> <p>Long-term Orientation/Focus<br/>Decisiveness<br/>Life Balance/Ability to Cope<br/>Self Awareness<br/>Self Control<br/>Professional Development</p> |
| Tucker, Bonial, Vanhove, and Kedharnath (2014) |   | <p><b>World view</b></p> <ul style="list-style-type: none"> <li>• Open-Mindedness/Respect for Beliefs</li> </ul> <p><b>Social/interpersonal style</b></p> <ul style="list-style-type: none"> <li>• Instilling Trust</li> <li>• Adapting Socially</li> </ul> <p><b>Situational approach</b></p> <ul style="list-style-type: none"> <li>• Flexibility</li> <li>• Navigating Ambiguity</li> </ul>   | <p><b>World view</b></p> <ul style="list-style-type: none"> <li>• Lifetime Learning</li> </ul> <p><b>Situational approach</b></p> <ul style="list-style-type: none"> <li>• Patience</li> <li>• Even Disposition</li> <li>• Humility</li> <li>• Locus of Control/Initiative</li> </ul> <p>Open-Minded<br/>Idealist<br/>Adaptable<br/>Fearless<br/>Self-Awareness</p>   |
| Hassanzadeh, Silong, Asmuni, and Whahat (2015) | <p>Awareness</p> <ul style="list-style-type: none"> <li>• Problem Awareness</li> <li>• Cultural Awareness</li> </ul>  | <p>Global Sensitivity<br/>Global Critical Thinking<br/>Team Working</p>  |   |

*Major reviews of global leadership competencies focused on organizing the field*

| <i>Authors</i> | <i>Business &amp; Organizational Acumen</i>   | <i>Managing People &amp; Relationships</i>  | <i>Managing Self</i>  |
|----------------|---|---|---|
| Mendenhall and | <p><b>Vision</b></p> <ul style="list-style-type: none"> <li>• Articulating a tangible vision and strategy</li> <li>• Envisioning</li> <li>• Entrepreneurial Spirit</li> </ul> | <p><b>Relationship Skills</b></p> <ul style="list-style-type: none"> <li>• Close Personal Relationships</li> <li>• Cross-Cultural Communication Skills</li> </ul> | <p><b>Traits</b></p> <ul style="list-style-type: none"> <li>• Curiosity/Inquisitiveness</li> <li>• Continual Learner</li> <li>• Learning Orientation</li> <li>• Accountability</li> </ul> |

|                     |  |   |   |
|---------------------|--|---|---|
| Osland (2002)       | <ul style="list-style-type: none"> <li>• Catalyst for Cultural Change</li> <li>• Change Agency</li> <li>• Catalyst for Strategic Change</li> <li>• Empowering, Inspiring</li> </ul>  | <ul style="list-style-type: none"> <li>• “Emotionally Connect” Ability</li> <li>• Inspire, Motivate Others</li> <li>• Managing Cross-Cultural Ethical Issues</li> </ul>   | <ul style="list-style-type: none"> <li>• Integrity/Courage</li> <li>• Commitment</li> <li>• Hardiness</li> <li>• Maturity</li> <li>• Results Orientation</li> </ul>   |
| <i>Authors</i>      | <i>Business &amp; Organizational Acumen</i><br><b>Business Expertise</b> <ul style="list-style-type: none"> <li>• Global Business Savvy</li> <li>• Global Organizational Savvy</li> <li>• Business Acumen</li> <li>• Total Organizational Astuteness</li> <li>• Stakeholder Orientation</li> <li>• Results Orientation</li> </ul> <b>Organizing Expertise</b> <ul style="list-style-type: none"> <li>• Community Building</li> <li>• Creating Learning Systems</li> <li>• Strong Operational Codes</li> <li>• Strong Customer Orientation</li> </ul> | <i>Managing People &amp; Relationships</i><br><b>Organizing Expertise</b> <ul style="list-style-type: none"> <li>• Team Building</li> <li>• Organizational Networking</li> <li>• Global Networking</li> </ul> <b>Behavioral Skills</b> <ul style="list-style-type: none"> <li>• Social Skills</li> <li>• Networking Skills</li> </ul> <b>Mental Characteristics</b> <ul style="list-style-type: none"> <li>• Social Judgment Skills</li> <li>• Empathy</li> </ul> | <i>Managing Self</i><br><b>Cognitive</b> <ul style="list-style-type: none"> <li>• Environmental Sensemaking</li> <li>• Global Mindset</li> <li>• Thinking Agility</li> <li>• Improvisation</li> <li>• Pattern Recognition</li> <li>• Cognitive Complexity</li> <li>• Cosmopolitanism</li> <li>• Managing Uncertainty</li> <li>• Local vs. Global Paradox</li> </ul> <b>Mental Characteristics</b> <ul style="list-style-type: none"> <li>• Optimism</li> <li>• Self-regulation</li> <li>• Motivation to work in an international environment</li> <li>• Cognitive Skills</li> <li>• Acceptance of complexity and contradictions</li> </ul> <b>Fundamental Core</b> <ul style="list-style-type: none"> <li>• Self-Awareness</li> <li>• Engagement in personal transformation</li> <li>• Inquisitiveness</li> </ul> |
| Jokinen (2005)      | <b>Behavioral Skills</b> <ul style="list-style-type: none"> <li>• Knowledge</li> </ul>   | <b>Behavioral Skills</b> <ul style="list-style-type: none"> <li>• Social Skills</li> <li>• Networking Skills</li> </ul> <b>Mental Characteristics</b> <ul style="list-style-type: none"> <li>• Social Judgment Skills</li> <li>• Empathy</li> </ul>   | <b>Mental Characteristics</b> <ul style="list-style-type: none"> <li>• Optimism</li> <li>• Self-regulation</li> <li>• Motivation to work in an international environment</li> <li>• Cognitive Skills</li> <li>• Acceptance of complexity and contradictions</li> </ul> <b>Fundamental Core</b> <ul style="list-style-type: none"> <li>• Self-Awareness</li> <li>• Engagement in personal transformation</li> <li>• Inquisitiveness</li> </ul>   |
| McCarthy (2010)     | Visionary and Strategic Skills<br>Geocentric situational and relational leader skills  | Communication Skills<br>Cross-Cultural Competence Skills<br>Motivational and People Skills  |   |
| Kim & McLean (2015) | Global Business Cluster<br>Global Organizational cluster   | Intercultural Cluster<br>Interpersonal Cluster  | Other Cluster (An internally incoherent, non-clustering collection of competencies)   |

\* Boldfaced items refer to "umbrella" competency categories that encompass two or more sub-dimensions. In some instances, an umbrella category may contain sub-dimensions that apply to more than one column.

Competencies are distributed roughly equally across the three categories—69 of the 207 competencies fall into the *Business and Organizational Savvy* grouping, with 63 and 60 competencies in the *Managing People and Relationships* and *Managing Self* groups respectively. Despite fairly even distribution across categories, there is considerable variation among scholars with regard to focus. Wills and Barham (1994), for example, focus on only competencies related to managing self, while Yeung and Ready (1995) concentrate primarily on business and organizational savvy, to the exclusion of competencies involving the management of self. In some cases this focus appears to be intentional. Bird and associates (2010) explicitly center their attention on interpersonal and self competencies, noting that their exclusion of business or organizational competencies is conscious and reflects a focus on a subset of global leader competencies associated primarily with intercultural effectiveness. Alternatively, several studies (Youssef & Luthans, 2012; Reichard, Dollwet, & Louw-Potgieter, 2013) focus on a

single competency cluster—positive psychological capital—and explore the ways that its components of hope, optimism, self-efficacy, and resilience contribute to effective global leadership. Javidan and Walker (2012) take yet another approach, focusing on global mindset as *the* central global leadership competency and then argue that the three primary components of global mindset, and their accompanying facets are sufficiently broad so as to encompass the full range of categories.

Missing from [Table 4.3](#) is an acknowledgment that many studies delineate relationships among the competencies that cannot be displayed in a table format. The formulation by Black, Morrison, and Gregersen (1999) is typical of this approach. In their particular case, they lay out the linkages between their four competencies, detailing how each links to and reinforces the others. Though this aspect of the various competency frameworks was addressed in Chapter 3, it is important not to ignore this element when considering [Table 4.3](#)

Last, the bottom section of [Table 4.3](#) incorporates the Mendenhall and Osland (2002) and Jokinen (2005) conceptualizations, showing how their synthesized competencies would fit into the current format.

## Competencies of Business and Organizational Acumen

One group of global leadership competencies relates to a practical understanding of business and organizational realities and how to get things done efficiently and effectively. They reflect global leadership on a larger scale, “at a distance,” and are directed toward the entire organization or to a global unit or initiative within the organization. Business and organizational acumen appears to entail five composite competencies: *Vision and Strategic Thinking*, *Business Savvy*, *Organizational Savvy*, *Managing Communities*, and *Leading Change*. Each of these competencies encompasses a variety of more specific skills, abilities, knowledge bases, or orientations. They are presented in [Table 4.4](#) in order of frequency of dimensions cited (i.e., of the fifty-five competencies in this category, the largest number entailed capacity related to strategic thinking and vision, the second largest number related to *Business Savvy*, and so forth). The table also notes instances where a given dimension was cited by more than a single study (e.g., build community, under *Managing Community*). Of the five competencies, the first three account for roughly 80 percent of all dimensions cited. The remaining two, *Leading Change* and *Organizational Savvy*, accounted for about 10 percent each.

[Table 4.4 Business and Organizational Acumen Competencies](#)

| <i>Vision &amp; Strategic Thinking</i>                   | <i>Business Savvy</i>  | <i>Managing Communities</i>                         |
|--|--|---|
| Intellectual Intelligence (2)                            | Business Acumen  | Customer Orientation                                |
| Foresight  | Business Savvy (2)   | Stakeholder Orientation                             |
| Intuition  | Business Cultural Intelligence   | Building Partnerships & Alliances                   |
| Historical Futurist                                      | Demonstrate Savvy  |   |
| Oscillation between detail and big picture               | Business Geographer  | Influence Stakeholders                              |
|  | Economic Integrator  | Stakeholder Management                              |
| Environmental Scanning                                   | Global Capitalist  | Interact with external clients from other countries |
| Understand environmental risks & social trends           | Results Orientation  |   |
|  | Entrepreneurial Spirit   | Interact with internal clients from other countries |
| Using Systems Theory Global Awareness (3) Frame Shifting | Substantive depth related to the organization’s primary business processes | Manage foreign suppliers or vendors                 |
| Responsive to Change Depth of Field                      | Value-added technical and business skills                                  | Build Community (2) Expand Ownership                |
| Visioning  | Developing Technical Savvy   | Outside Orientation                                 |
| Articulate a tangible vision (2)                         | Finding Creative Solutions   | Boundary Spanning (3)                               |
| Building a shared vision                                 | Manage risk on a worldwide basis   | Bridge-Maker  |
| Inspirational  |  | Utilizing Technology (3)                            |
| Chaos Navigator  | Adapt and Add Value  |   |
| Strategic international understanding                    | Third Way Solutions  |   |
| Strategic Thinking (2)                                   |  |   |
| Balancing short- and long-term considerations            |  |   |
| Understanding Interdependence                            |  |   |
| Able to deal with complexity                             |  |   |
| Develop a strategic business plan on a worldwide basis   |  |   |
| <i>Organizational Savvy</i>                              | <i>Leading Change</i>  |   |
| Organizational Savvy                                     | Catalyst for strategic change  |   |
| Total Organizational Acumen                              | Catalyst for cultural change   |   |

|   |                          |
|---|--------------------------|
| Designing & Aligning                              | Lead Change              |
| Architecting                                      | Change Management Skills |
| Manage a budget on a worldwide basis              | Change Agency            |
| Demonstrating knowledge of the whole organization |                          |

---

\*(#) indicates multiple references for the designated competency.

Careful analysis of the specific dimensions cited and their origins suggests that scholars who focused on this specific aspect of global leadership competency were more likely to differentiate a broader number of dimensions. For example, Yeung and Ready (1995) concentrated almost exclusively on competencies in this group. In doing so, they identified three dimensions—*articulate a tangible vision*, *catalyst for strategic change*, and *catalyst for cultural change*—that might be better thought of as being tightly integrated. After articulating a tangible vision, a global leader must then be able to act as a catalyst for strategic and cultural change. Moreover, of the three remaining dimensions they focus on, two fit into other competencies in this grouping—results orientation into *Business Savvy* and customer orientation into *Managing Communities*. In a similar vein, Bird and Osland (2004) differentiate among three different dimensions within the *Managing Communities* competency—span boundaries, influence stakeholders, and build community.

***Vision and Strategic Thinking*** encompasses three primary capabilities. The first is the ability to comprehend the complexity of the environment and think about it in strategic ways. Dimensions such as intellectual intelligence, depth of field, oscillation between detail and big picture, balancing short- and long-term, or understanding interdependence characterize varying aspects of the ability to think strategically. The second capability entails activities related to developing and articulating a global vision for the organization or business unit. The third capability constitutes aspects of skills enabling global leaders to develop a strategic plan and implement it.

***Business Savvy*** may be characterized as primarily a knowledge-based competency, entailing as it does practical understanding and wisdom. It can be broken down into two types of knowledge and a general orientation or attitude toward finding efficient solutions to add value. General business savvy may link to strategic thinking in the *Vision and Strategic Thinking competency* but appears to reflect a broader, practical-oriented knowledge. A second type of knowledge is technically oriented or grounded in the operational processes of the organization. These two types of knowledge complement the third dimension, which is a value-added orientation that combines an entrepreneurial spirit with a focus on creative solutions.

***Managing Communities***, the third dominant competency, centers on the ability of global leaders to attend to the broader network of relationships in which a firm is embedded. The nature of the global economy in the 21st century is that firms find it necessary to collaborate or, at a minimum, cooperate with a wide variety of actors, from buyers to suppliers to competitors to shareholders to nongovernmental entities and interest groups. This requires boundary-spanning skills, one of the most distinctive competencies differentiating global leaders from their domestic counterparts (Osland, Bird, & Oddou, 2012). In addition to the ability to span boundaries, global leaders must also be able to influence stakeholders, the second dimension in *Managing Communities*. Finally, boundary spanning and influencing stakeholders, while having value in their own right, work primarily in the service of the third dimension, which is the ability to forge a firm and its disparate set of stakeholders into a viable community in order to accomplish strategic objectives.

***Organizational Savvy*** is the fourth competency and addresses the ability of global leaders to design organizational structures and processes in ways that facilitate global effectiveness. Two of the four dimensions focus on design issues. The remaining two are focused on functioning effectively within the organization.

***Leading Change***, the final competency, represents a set of capabilities that enable global leaders to implement change. It may be appropriate to view the other four competencies as instrumental in that they support this capability. The primary thrust of global leadership is to bring about change (Osland, Bird,

Mendenhall, & Osland, 2006; Mendenhall, Reiche, Bird, & Osland, 2017).

## Competencies of Managing People and Relationships

The second group of global leadership competencies is directed toward people and relationships. They represent leadership at “close quarters” (i.e., leadership of those with whom one interacts directly, often in person). More broadly, they are focused on managing people and interpersonal relationships. [Table 4.3](#) identifies 47 competency dimensions that fall into this group. We identify five composite competencies: *Cross-cultural Communication*, *Interpersonal Skills*, *Valuing People*, *Empowering Others*, and *Teaming Skills*. The competencies and their dimensions are presented in [Table 4.5](#). Of the five competencies, the first three account for roughly 70 percent of all dimensions cited.

With one exception, all of the studies cited in [Table 4.3](#) incorporate one or more dimensions covered by this group of competencies. The two most frequently cited competencies, *Cross-cultural Communication* and *Interpersonal Skills*, would appear to have large overlap. Nevertheless, numerous studies (c.f., Bird, Mendenhall, Stevens, & Oddou, 2010; Caligiuri & Tarique, 2009; Rosen, Digh, Singer, & Philips, 2000) make distinctions between the two types of competencies. The distinction appears to be between the more general interpersonal skills, including sensitivity to relationships, emotional sensitivity, and so forth, and those specifically related to communicating across cultures.

We discuss each of the five competencies below. Though presented in [Table 4.5](#) in order of the number of dimensions ascribed to them, they are discussed in a sequence that reflects their relative importance and their relationship to one another.

*Valuing People*, although the third-most-prevalent competency, also appears to be foundational in that all other competencies can be viewed as predicated on it. It encompasses three distinctive dimensions that have at their core a recognition of the value of people as individuals. There are three distinct dimensions. The first is a respect for people and their differences. This respect either leads to or is derived from a deep understanding of people as individuals and an ability to comprehend people—their emotions, intentions, and motivations. The third dimension of *Valuing People* is an orientation toward and an ability to create and maintain trusting relationships.

[Table 4.5 Managing People and Relationships Competencies](#)

| <i>Interpersonal Skills</i>                                      | <i>Cross-cultural Communication</i>            | <i>Valuing People</i>    |
|--|--|--------------------------|
| Emotional Intelligence (2)                                       | Cultural Intelligence                          | Respect for Others (2)   |
| Empathy (3)  | Cross-Cultural Communication (3)               | Respectful Modernizer    |
| Emotional Sensitivity  | Culture Bridger                                | Cultural Awareness (2)   |
| Extraversion (2)   | Cultural interest and sensitivity              | Cultural Acumen (2)      |
| Social Flexibility (6)   | Appreciating Cultural Diversity                | Skilled People Reading   |
| Agreeableness  | Cross-Cultural Understanding (2)               | Understand Actors        |
| Presence   | Communication Skills (2)                       | Showing Inclusiveness    |
| Relationship Interest (2)  | Mindful Communication                          | Pragmatic Trust          |
| Interpersonal Engagement Collaborative Individualism Sensitivity | Work with colleagues from other countries      | Create & Build Trust (2) |
| Build Relationships  | Language skills (2)                            |                          |
|  | Supervise employees of different nationalities |                          |

|   |   |
|---|---|
| Results Through Relationships (2)                       |   |
| Intercultural Sensitivity                               | Negotiate in other countries or with people from other countries          |
| Intercultural relationship Skills (3)                   |   |
| Conflict Management Skills Diplomacy                    | Cultural Self-Awareness   |
| Influencing/Motivational Skills                         |   |
| Urgent Listening  |   |
| Instilling Trust  |   |
| <i>Empowering Others</i>                                | <i>Teaming Skills</i>   |
| Being able to empower others Energizing                 | Team Building (2)   |
| Rewarding & Feedback                                    | Managerial ability, with an emphasis on teamwork and interpersonal skills |
| Connective Teaching                                     | Multicultural Teaming   |
| Sharing Leadership                                      | Team Management skills  |
| Develop Future Leaders                                  | Team-spirited   |
| Demonstrating appropriate confidence in self and others | Blender   |
| Coaching and Guidance Skills Delegation Skills          |   |

\*(#) indicates multiple references for the designated competency.

**Interpersonal Skills** represent the primary competency within the grouping, and include a range of predispositional, attitudinal, cognitive, motivational, and behavioral dimensions. For example, extraversion and relationship interest are usually considered to be predispositional (Bird et al., 2010), while interpersonal engagement and emotional sensitivity are more often viewed as attitudinal and cognitive respectively. Social flexibility and building relationships are best classified as behavioral skills. The competency can be broken into two broad dimensions: emotional intelligence and relationship management skills. The former include such abilities as sensitivity, interpersonal engagement, and self-awareness. The latter include dimensions related to behaviors that involve managing relationships (e.g., influencing, urgent listening, and using relationships to achieve results).

**Cross-cultural Communication**, the third competency, is concentrated on communicating across cultural differences. Cross-cultural communication usually entails a high level of mindfulness (i.e., a conscious awareness of contextual, cultural, and individual differences and the way in which these differences influence how messages are encoded, transmitted, received, and interpreted, as well as the reciprocal feedback process). There appear to be two components for this competency. General cultural awareness can be divided into awareness of cultural differences of others and awareness of one's own cultural influences. The second component relates to specific cognitive and behavioral skills in an intercultural context. These include the ability to speak the other person's language, skills at negotiating across cultures, and the ability to contextualize general communication skills in culturally appropriate ways.

**Empowering Others** is the fourth competency and addresses the ability of global leaders to energize direct reports, colleagues, and superiors by increasing their sense of personal self-efficacy. This may entail coaching skills, understanding how to delegate authority in culturally appropriate ways, and the ability to instruct others or, more broadly, to aid in the personal and professional development.

**Teaming Skills**, the final competency, relates to the ability to work effectively in multicultural and global virtual teams. This includes the ability to lead teams as well as to take a subordinate role and work as a valued contributor to the team's effort.



## Competencies of Managing Self

The final group of global leadership competencies is directed inward to the predispositional, cognitive, and attitudinal processes in the mind of the global leader or involve aspects of personal management. Leading in a global context is personally challenging and requires a special mix of capabilities for managing oneself. Of the three groupings, the *Managing Self* category drew the most frequent number of competency listings, though there was also substantial overlap with nearly half the competencies receiving multiple citations. There was also wider agreement across studies with regard to specific dimensions. Labels such as “resilience,” “inquisitiveness,” and “flexibility” received multiple citations. *Global Mindset*, the least-referenced composite competency (see [Table 4.6](#)), nevertheless had multiple references to a limited number of descriptive labels. Much like the first two categories, three of five competencies garnered upward of 75 percent of the dimensions. *Character* had the most with seventeen dimensions. *Global mindset* had the least with four.

Table 4.6 Managing Self Competencies

| <b>Character</b>                              | <b>Resilience</b>                                | <b>Inquisitiveness</b>                  |
|---|--|---|
| Integrity (3)                                 | Resilience to Stress                             | Inquisitiveness (4)                     |
| Exhibit Character Authenticity (2)            | Resilient, resourceful, optimistic and energetic | Curiosity & Learning Aggressive Insight |
| Honesty                                       | Resilience (3)                                   | Open-mindedness (4)                     |
| Maturity                                      | Emotional Stability                              | Openness to Experience (2)              |
| Trustworthy                                   | Emotional Resilience                             | Inviting the Unexpected                 |
| Make Ethical Decisions (2)                    | Non Stress Tendency (2)                          | Nonjudgmentalness                       |
| Self-Identity (2)                             | Stress Management                                | Initiative (3)                          |
| Self-Mastery                                  | Optimism (3)                                     | Quest for Adventure                     |
| Accounting                                    | Realistic Optimism                               | Passion for Diversity (2)               |
| Conscientiousness                             | Self-Confidence (3)                              | Humility (2)                            |
| Self Awareness (5)                            | Personal Management (3)                          | Confident Humility                      |
| Core Values and Flexibility                   | Life Balance (2)                                 | Motivation to Learn                     |
| Passion to Excel (3)                          | Stable Personal Life                             | Learn from Experience (3)               |
| Tenacity (2)                                  | Self Regulation                                  |   |
| Courage (3)                                   | Patience   |   |
| Overcoming Adversity                          |  |   |
| <b>Flexibility</b>                            | <b>Global Mindset</b>                            |   |
| Flexibility (4)                               | Global Mindset (6)                               |   |
| Embrace Duality                               | Cosmopolitanism (3)                              |   |
| Cognitive Complexity (3)                      | Cognitive Complexity (4)                         |   |
| Thinking Agility                              | Thinking Globally                                |   |
| Authentic Flexibility Agility                 |  |   |
| Open-minded and flexible in thought & tactics |  |   |
| Interest Flexibility                          |  |   |
| Tolerance of Ambiguity (3)                    |  |   |
| Creativity (2)                                |  |   |

\*(#) indicates multiple references for the designated competency.

Despite the attention directed to this set of competencies, it is also worth noting that of the sixteen studies cited in [Table 4.3](#), four (Yeung & Ready, 1995; Bikson et al., 2003; Alon & Higgins, 2005; Butler et al., 2012) do not identify any dimensions falling into this category.

**Character** can be defined as an admixture of integrity, maturity, and conscientiousness. Black, Morrison, and Gregersen (1999) place a strong emphasis on character, describing it as one of four critical elements. Similarly,

Bird and Osland (2004) identify it as one of four “threshold traits” that provides a foundation for other global leader competencies. McCall and Hollenbeck (2002) frame integrity as a core honesty. A second facet of character is maturity, which entails a sense of self-awareness and clarity around personal values as well as a measured sense of one’s place in the world. Related to this is a notion of accountability, being responsible for one’s actions. Bird and associates (2010) call this facet *Self-Identity*, which they define as an awareness of one’s personal values and the way they impact one’s interactions with others. Gundling, Hogan, and Cvitkovich (2011) label this *core values and flexibility*. The third facet of character can be described as *persistence*. Kets de Vries and Florent-Treacy (1999) call this *tenacity*, a commitment to persevering through difficult times. It is closely related to the predispositional quality of *conscientiousness* that is part of the Big Five set of personality characteristics (Caligiuri & Tarique, 2009).

**Resilience** refers to a set of dimensions that relate to a global leader’s ability to cope with the highly stressful challenges of leading across multiple time zones, large distances, myriad cultures, and widely varying national international political and regulatory systems. This competency is comprised of two broad dimensions. The first relates to a set of predispositional and attitudinal capabilities. The predispositional facets of this dimension include non-stress tendency, optimism, and resilience, which are also referred to as hardiness or low neuroticism (Costa & McCrae, 1992). Attitudinal facets include self-confidence and resourcefulness. The second dimension is primarily behavioral and involves the pursuit and management of activities and lifestyle choices—exercise, meditation, hobbies, proper rest, dietary habits, etc.—that reduce stress and facilitate recovery from stressful activities. More broadly considered, this dimension incorporates a life balance between work, social interest, and the maintenance of personal physical, psychological, social, and spiritual well-being.

**Inquisitiveness**, the most cited competency in this group, refers to an innate curiosity, an openness to learning, and humility. Black, Morrison, and Gregersen (1999) view *inquisitiveness* as the most essential personal quality of global leaders, considering it an animating force that undergirds other competencies. A second facet of this competency is *openness*, which is broadly framed as being open to new ideas, new experiences, and new people. Moro Beuno and Tubbs (2004) label it *open-mindedness*, and identify a related facet of willingness to learn. The third facet is *humility*, which can be described as not letting pride or self-consciousness interfere with learning. Rosen and associates (2000) refer to it as *confident humility*, not feeling threatened by the need to learn and open to being taught by others. Bird and Osland (2004) define *humility* as a passive counterpart to *inquisitiveness*. As opposed to actively seeking out and exploring novelty and difference, *humility* entails allowing oneself to be taught by others.

**Flexibility** involves willingness to adapt and adjust to varied situations. It incorporates a cognitive component, *intellectual flexibility*, which Black, Morrison, and Gregersen (1999) refer to as *embracing duality*, and it parallels and supports the *cognitive complexity* facet of global mindset. Bird and associates (2010) focus on *tolerance of ambiguity*, a construct established more broadly in psychology; however, their strain of *tolerance of ambiguity* is specific to the intercultural context common to global leadership. Flexibility also incorporates a behavioral component, *behavioral flexibility*, which entails a willingness to adapt or adjust one’s behaviors to fit differing circumstances or situational demands (Bird et al., 2010).

**Global Mindset**, the final competency, is a cognitive competency that reflects a combination of perspective, attitude, and knowledge. It can be broken down into two facets. The first is *cognitive complexity*, specifically a highly contextualized, multifaceted, multilayered approach to the environment. The cognitively complex global leader starts from an assumption that any situation is characterized by myriad interdependencies and that relationships involve complex, dynamical properties. The second facet of global mindset is *cosmopolitanism*, an interest in and knowledge of the world—nations, social and political institutions, cultures, and people, etc. (Levy et al., 2007).



## Concluding Thoughts

After cultivating, weeding, sorting, and organizing the global leadership competency garden, we have distilled the original list of 200 competencies down to fifteen and ordered them in three broad categories. Each of the fifteen competencies reflects a complex, multifaceted construct. For example, *Inquisitiveness* includes facets related to *curiosity*, *openness to experience* and *humility*, and *learning*. The final ordering is presented in [Table 4.7](#). Though the table may give an impression of simplicity—three groups of five competencies each, the multifaceted aspect of each competency encompasses significant complexity. Moreover, the various facets of a given competency span predispositional, attitudinal, cognitive, behavioral, and knowledge aspects. As shall be seen in the subsequent chapters, addressing how to assess and develop global leadership capabilities, the variety of competency aspects creates significant challenges.

Recently Mendenhall and associates (2012) sought to clarify the definition of global leadership. Their stated intent was to bring definitional clarity to study of global leadership. By reviewing previous definitions and explicitly addressing areas of disagreement or confusion, they sought to avoid the fragmentation that has afflicted other areas of inquiry. They also hoped to facilitate a more focused and disciplined approach to theoretical and empirical work on global leadership. More recently Reiche, Bird, Mendenhall, and Osland (2017) have proposed a typology of global leadership roles that opens up a new line of thinking about competencies. They identify four distinctive leadership types, noting variations in contextual constraints and role demands that require different configurations of competencies. This is an area that warrants further exploration.

[Table 4.7 A Framework of Nested Global Leadership Competencies](#)

| <b><i>Business &amp; Organizational Acumen</i></b> | <b><i>Managing People &amp; Relationships</i></b> | <b><i>Managing Self</i></b> |
|--|---|-----------------------------|
| Vision & Strategic Thinking                        | Valuing People                                    | Inquisitiveness             |
| Leading Change                                     | Cross-cultural Communication                      | Global Mindset              |
| Business Savvy                                     | Interpersonal Skills                              | Flexibility                 |
| Organizational Savvy                               | Teaming Skills                                    | Character                   |
| Managing Communities                               | Empowering Others                                 | Resilience                  |

This chapter has sought the facilitation of the development of a common body of knowledge on global leadership by stemming the proliferation of competency dimensions. Doing so increases the likelihood that the interpretation of empirical results will be less problematic, and the accumulation and integration of findings will be more easily achieved.

It is questionable whether any field of inquiry can move forward if it persists in accommodating an ever-increasing array of constructs, many of which have largely overlapping construct domains. The nature of rigorous inquiry holds that there is always the possibility that new theory and new empirical findings may lead to a reformulation of existing organizing frames, an extension or elaboration of current constructs, or even the development of new ones. It is also the case that as a field matures, consolidation enhances research progress. In short, it is easier to grow a well-trimmed garden.

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## Assessing Global Leadership Competencies

ALLAN BIRD AND MICHAEL J. STEVENS

A quick tour of the Internet provides some insight regarding the topic of this chapter—the assessment of global leadership competencies. In just .96 seconds Google references 783 million websites relating to leadership. Narrow the search to “global leadership” and it takes .67 seconds to identify 3.8 million sites. But key in “global leadership assessment,” and only 11,300 sites surface. This is a significant change since the publication of the first edition of this book in 2008. At that time, the respective numbers were: 170 million, 983,000, and 64. Some of this change may be attributable to the growth of the Internet itself. But it is reasonable to also conclude that there is increasing interest in the subject of global leadership and significant growth in trying to assess global leadership competencies. Nevertheless, as we will discover as we proceed further, when it comes to assessing the competencies associated with effective global leadership, much work remains to be done.

In this chapter we will begin by discussing what “competency” means in the context of global leadership and note significant challenges in identifying and measuring it. We’ll then move on to a consideration of a variety of instruments that are currently used by practitioners and scholars.

A comprehensive review of proposed competencies is beyond the scope of this chapter, which has as its central focus a review of assessment instruments. [Chapters 1](#) and [2](#) both present an overview of the broader research on global leadership, much of which has taken a content view and hence, has focused on leader characteristics that are, either implicitly or explicitly, put forward as competencies. For a more detailed review of the leadership competency literature, readers should consult Chapter 4 of this volume as well as Jokinen (2005) and Osland, Bird, Mendenhall and Osland (2006).

## Defining Global Leadership Competency

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The pioneering work on competency as a concept in the workplace was carried out by McClelland (1973), who defined it as a set of underlying characteristics that an individual or team possess that have been demonstrated to predict superior or effective performance in a job. McClelland was particularly concerned with identifying behaviors that superior performers possessed and that average or underperformers did not have. Boyatzis (1982) emphasized the causal connection between capabilities a person possessed prior to performance that could be used to predict superior performance in a given situation. Working from this conception of competency, there are three clear standards that must be met to define an individual characteristic or capacity as a competency: 1) it must exist prior to performance; 2) it must be causally linked to performance; and 3) it must be possessed by superior, but not by average or subpar, performers.

The task domain of global leadership makes it difficult to identify competencies that conform to the three standards presented above. As Osland and associates (2006) note, there is no agreed-upon definition for what constitutes global leadership. Even where it is possible to succinctly define a global leader as someone whose job responsibilities include a global scope (Black, Morrison, & Gregersen, 1999), the range of positions to which such a definition applies makes it problematic to circumscribe a specific range of activities or behaviors. Be that as it may, for our purposes here, it may be useful to adopt Jokinen's (2005: 200) formulation as our definition of global leadership competencies:

[They are] those universal qualities that enable individuals to perform their job outside their own national as well as organizational culture, no matter what their educational or ethnic background is, what functional area their job description represents, or what organization they come from.

As noted in [Chapter 1](#), assessing global leadership competencies presents several distinct challenges. First, there may be a tendency to overspecify the number of competencies required for superior performance in a specific job (Conger & Ready, 2004). For example, Morrison (2000) notes that Chase Manhattan Bank has identified 250 competencies associated with global leadership, whereas Mendenhall and Osland (2002) reviewed the academic scholarship on global leadership and came up with a list of 56 competencies. It is reasonable to question whether such lengthy lists are useful or practical.

A second challenge is that both practitioners and academics alike may be inclined to develop competency lists that reflect an idealized performance standard, rather than what is actually possible (Conger & Ready, 2004). This may arise as a consequence of trying to envision what superior performance might look like or what behaviors might lead to it rather than focusing on what has been demonstrated to be superior performance or on what is realistic.

Third, there is a need to distinguish between competency types. In studying expatriate managers—the group single-most associated with global leadership research—Leiba-O'Sullivan (1999) proposes a distinction between stable and dynamic competencies. Stable competencies reflect aspects of personality and are relatively settled and enduring over time. They are difficult, if not impossible, to significantly change. However, they may be broadly applicable (i.e., they may contribute to superior performance across a range of jobs or work situations). For example, the personality predisposition of optimism is widely accepted as contributing to superior performance across a multitude of managerial positions. By contrast, dynamic competencies are specific skills and abilities that can, to a greater or lesser degree, be taught. They are, however, often more narrowly applicable. For example, typing skills can be taught, though some people will learn how to type more accurately and more quickly than others. Moreover, the ability to type accurately and quickly is less likely to be associated with superior performance across a broad range of managerial positions or situations. The distinction between stable and dynamic competencies is sometimes framed respectively in terms of “soft” versus “hard” competencies or “behavioral” versus “technical.”

In the next section, we will review several of the more widely used assessment instruments. After presenting

the competencies purportedly measured by each, we will attempt to evaluate them in accordance with the three standards noted above, namely: (1) do the competencies exist prior to performance; (2) are they causally linked to performance; and (3) do they distinguish between superior and non-superior performance? We'll do that by looking for empirical evidence that supports their ability to predict performance.

## Global Leadership Competency Assessment Instruments

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Broadly classified, assessment instruments used in developing global leaders fall into one or three broad categories: cultural difference assessments, intercultural adaptability assessments, and global leadership competency assessments. We consider each type below and discuss some specific assessment instruments within each category.

### Cultural Difference Assessments

Although not directly focused on assessing global leader competencies, it is appropriate to recognize that practitioners and scholars have developed a variety of assessments and survey instruments for identifying variations in national cultural values across a range of dimensions. A number of the more widely used instruments (e.g., Hampden-Turner & Trompenaars, 2000; Hofstede, 2001; Maznevski & DiStefano, 1995) are often construed as a form of indirect competency assessment. In a typical application along these lines, a manager's cultural profile (i.e., their score or position on cultural value dimensions) will be computed, and these will be used within the context of a training program to determine developmental needs. In this regard, it is appropriate to view them as competency assessment proxies since they are used to identify areas where the development of hard competencies may lead to superior performance.

Taras (2006b) has compiled the most comprehensive catalogue of such instruments to date. More than 100 instruments cover the gamut of work- or business-related dimensions on which cultures are likely to vary, including the common (e.g., individualism, power distance, uncertainty avoidance, and universalism) and the not-so-common (e.g., family integrity, faith in people, and upward influence). Where available, Taras (2006b) also provides the specific items in the instruments as well as Cronbach alpha and test-re-test reliabilities.

We also note that Taras (2006a) has compiled a similarly comprehensive catalogue of surveys and instruments used to assess acculturation. Though less frequently used for global leader competency assessment, acculturation surveys are sometimes used in corporate training and development programs. This catalogue contains information on 50 assessments and also includes Cronbach alpha and test-re-test reliability information where available.

### Intercultural Adaptability Assessments

In this section we will consider several instruments that have as their primary focus effective intercultural competence. Instruments that fall into this category are frequently used in conjunction with global manager development programs. Because effective interaction with culturally different others is a critical aspect of effective global leadership in most contexts, the assessment of intercultural competence is highly appropriate. At the same time, it is important to recognize that intercultural competence represents just one aspect of a global leader's competency set.

There are numerous intercultural adaptability assessments that are commercially available, but for which there is scant, if any, research literature. Stuart (2007) provides a practical, though perhaps less-than-critical, review of a range of instruments. A more comprehensive listing of intercultural assessment tools can be obtained from the Intercultural Communication Institute ([intercultural.org](http://intercultural.org)).

#### ***1. Cross-Cultural Adaptability Inventory***

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The *Cross-Cultural Adaptability Inventory (CCAI)* was developed by Kelley and Meyers (1995) as a self-assessment tool for cross-cultural adaptability training and development. Over time it has come to be used for measuring competency acquisition, as in pre- and post-test measures in conjunction with training programs.

The *CCAI* measures four dimensions: flexibility/openness, emotional resilience, perceptual acuity, and personal autonomy. After reviewing the literature and interviewing expert interculturalists, the developers originally settled on five dimensions, but dropped “positive regard” for others when their pilot studies failed to differentiate this dimension from the other four (Kelley & Meyers, 1995).

**Flexibility/Openness** ( $\alpha = .54$ ). This first of the four dimensions addresses the tendency to be open to others and broad-mindedness toward people and ideas. It also reflects a willingness to be flexible and nonjudgmental in one’s perspective.

**Emotional Resilience** ( $\alpha = .80$ ). The focus of this second dimension is the ability to navigate the unfamiliarity associated with intercultural situations while maintaining positive emotions. Negative emotional reactions (e.g., culture shocks or bumps) are frequent occurrences when working in intercultural contexts. Emotional resilience reflects an ability to cope, as well as quickly recover from, such situations.

**Perceptual Acuity** ( $\alpha = .78$ ). Openness to new people and experiences, and an ability to cope with stressful situations, can be easier when individuals are able to accurately read situations and detect and appropriately respond to verbal and nonverbal signals. This third dimension also considers an ability to communicate effectively in such situations.

**Personal Autonomy** ( $\alpha = .67$ ). The final dimension focuses on the possession and maintenance of a strong personal identity in the face of adapting to a new cultural context that involves others whose values may be different from one’s own.

The *CCAI* includes 50 items, is administered using a paper and pencil format, and is self-scored. The average respondent requires about ten minutes to complete the inventory. There is no mechanism for monitoring social response bias. Results are reported by tallying scores in four columns, with each column representing one of the dimensions. Interpretation of scores requires a facilitator/trainer.

The *CCAI* has primarily been used in studies attempting to measure the effectiveness of intercultural training programs. For example, Cornett-DeVito and McGlone (2000) used the *CCAI* to evaluate the effectiveness of intercultural training programs for law enforcement personnel. Similarly, Goldstein and Smith (1999) relied on the *CCAI* to evaluate the effectiveness of training programs for business professionals. It should be noted, however, that in a recent factor analytic study of the *CCAI*, Davis and Finney (2006) found that inventory items did not support a four factor structure. They conducted further exploratory factor analysis but concluded that no interpretable structure could be identified. At this time, there does not appear to be any independent or peer-review published research demonstrating the *CCAI*’s ability to predict interculturally effective behaviors in managers or other groups.

## ***2. Global Competence Aptitude Assessment***

The *Global Competence Aptitude Assessment (GCAA)* grows out of research in conjunction with an article published by Hunter, White, and Godbey (2006) and from Hunter’s dissertation (2004), which used a delphi technique to identify knowledge, skills, attitudes, and experiences essential to developing global competence. The *GCAA* identifies eight factors that are divided into two groups associated with competence: Internal Readiness and External Readiness.

The four factors comprising **Internal Readiness** are self-aware, willing to take risks, open-minded, and perceptive and respectful of diversity.

**Self-Aware** refers to possessing an accurate self-perception, which entails an honest and balanced view of oneself, as well as recognizing one’s place within society or within particular social contexts.

**Willing to Take Risks** reflects the degree to which one is willing to take unpopular or unconventional positions, and to risk making mistakes or taking on significant challenges, where success may be uncertain.

**Open-Minded** refers to being free from prejudice as well as being receptive to new ideas. Even though one may have opinions or have developed certain viewpoints, one should nevertheless remain open to new ideas and strive to avoid prejudging others.

**Perceptive and Respectful of Diversity** reflects an awareness that people differ in many ways, and whether one believes those differences are deserving of respect.

The four factors comprising **Internal Readiness** are globally-aware, knowledgeable about world history, interculturally competent, and effective across cultures.

**Globally Aware** considers the extent to which individuals are both knowledgeable about the world and also possesses an awareness of the world as a whole.

**Knowledgeable about World History** reflects an individual's knowledge and understanding of history about peoples and places throughout the world.

**Interculturally Competent** is the extent to which individuals are open to other cultures and flexible in interactions with people from other cultures.

**Effective across Cultures** considers the ability to function in intercultural contexts, collaborate with people from other cultures, and work effectively within and across cultures.

The *GCAA* includes 50 items and is administered online. The average respondent requires about 15 minutes to complete the inventory. There is no mechanism for monitoring social response bias.

The *GCAA* has seen only limited use in empirical studies to date, perhaps due to its relatively recent development. In one investigation of geographical knowledge learning, higher *GCAA* scores were found among 36 study abroad students when compared to a sample of 46 students who did not go on study abroad (Greunke, 2010).

### ***3. Intercultural Effectiveness Scale***

The *Intercultural Effectiveness Scale (IES)* was developed by Mendenhall, Stevens, Bird, Oddou, and Osland (2008) as an abridged version of the *Global Competencies Inventory* (described in detail later in this chapter) for general purpose use in assessing intercultural competency. The *IES* is primarily used in educational, government, and nonprofit organizational settings, but is also used in corporate contexts often as an early assessment tool. It is also widely used for program outcome assessment in university settings for both instructional purposes and for program outcome assessment. The *IES* measures three broad factors: continuous learning, interpersonal engagement, and hardiness. Each of these factors has two sub-dimensions.

#### ***Continuous Learning ( $\alpha = .85$ )***

This factor examines how people cognitively approach cultural differences and the degree to which individuals engage the world by continually seeking to understand themselves and learn about the activities, behaviors, and events that occur in cross-cultural environments. Continuous learning has the following two sub-dimensions:

**Exploration** ( $\alpha = .82$ ) is the extent to which people are open to and pursue an understanding of ideas, values, norms, situations, and behaviors that are different from their own. It reflects a fundamental inquisitiveness, curiosity, and an inner desire to learn new things.

**Self-Awareness** ( $\alpha = .76$ ) is the degree to which a person is aware of his or her personal values, strengths, weaknesses, interpersonal style, and behavioral tendencies, as well as the impact of these on other people.

### *Interpersonal Engagement* ( $\alpha = .86$ )

This is the second factor of the *IES* and considers how developing positive intercultural relationships depends in large part on one's interest in learning about people from other cultures, their customs, values, and so on. It is comprised of the following two sub-dimensions.

**Global Mindset** ( $\alpha = .84$ ) focuses on the extent to which a person is naturally interested in, and seeks to actively learn about, other cultures and people.

**Relationship Interest** ( $\alpha = .80$ ) is the extent to which a person is likely to initiate and maintain positive relationships with people from other cultures.

### *Hardiness* ( $\alpha = .84$ )

This is the third factor and examines how interacting with people from different cultural backgrounds requires significant psychological effort, which often produces stress, anxiety, and sometimes fear. This factor has the following two sub-dimensions.

**Positive Regard** ( $\alpha = .79$ ) assesses the degree to which individuals withhold judgments about people or situations that are new or unfamiliar.

**Emotional Resilience** ( $\alpha = .81$ ) reflects the level of emotional strength and capacity to cope with challenging emotional experiences.

The *IES* includes 60 items, is available only through online administration, and is currently available in nine languages (i.e., English, Chinese, French, German, Japanese, Spanish, Portuguese, Korean, and Arabic). The average respondent requires about 20 minutes to complete the inventory. There is no mechanism for monitoring social response bias. An individualized feedback report provides results for each of the *IES*'s six dimensions, three broad factors, and an overall score, by comparing each respondent's profile against a norm-referenced database currently in excess of more than 80,000 individuals worldwide. The feedback report also provides self-guided direction on the interpretation of scores and their application for learning and personal development.

The developers of the *IES* sought to create a more accessible and less costly version of the *Global Competencies Inventory (GCI)*, described in detail below, that would not require specialized training by administrators or the need for facilitation or coaching. Because of this, the psychometric properties and validity evidence for the *IES* closely mirror the findings from the empirical research on the *GCI* (Stevens, Bird, Mendenhall, & Oddou, 2014).

## **4. Intercultural Development Inventory**

The *Intercultural Development Inventory (IDI)* was developed by Hammer, Bennett, and Wiseman (2003) based on Bennett's (1993) Developmental Model of Intercultural Sensitivity (DMIS), which identifies six stages of intercultural development and associated competencies that group into two sets: ethnocentric and ethnorelative. The ethnocentric stages, in order of development, are Denial, Defense, and Minimization. The ethnorelative stages are: Acceptance, Adaptation, and Integration. The *IDI* measures an individual's worldview regarding cultural difference, which may be construed also as a capacity for intercultural competence. The ethnocentric stages can be interpreted as different ways of *avoiding* cultural differences, through denying that differences exist, defending one's culture against differences, or minimizing the extent or significance of the differences. The ethnorelative stages are ways of *seeking* cultural difference, through first accepting the importance of differences, then adjusting or adapting one's perspective to take differences into account and finally, by integrating the concept of culture and differences into one's identity. Each of the six stages can also be broken down into various sub stages.

### Ethnocentric Stages

**Denial.** This stage is characterized by a condition in which one's own culture is taken to be the only culture. Though other cultures may exist, they should be avoided or isolated. People in this stage are disinterested in cultural differences, but when confronted with differences may respond viscerally, seeking to eliminate differences that intrude into their sphere of activity. The two sub stages of Denial are Isolation and Separation.

**Defense.** The second ethnocentric stage reflects a worldview in which one's own culture (or an adopted culture) is experienced as the only good one. Other cultures are seen as being in opposition to one's own culture (i.e., "we" versus "them"). Moreover, other cultures are viewed as inferior and one's own as superior. People in this stage may feel threatened by cultural difference. An alternative position in this stage is to view one's own culture as inferior and other cultures as superior (i.e., to experience a reversal of dominant orientation in this stage). The three sub stages or categories of Defense are Denigration, Superiority, and Reversal.

**Minimization.** The third stage in the ethnocentric set takes a perspective that one's own culture reflects a deeper element universal to all cultures. Consequently, differences are minimized or suppressed. People in this stage may ignore or mask important differences. The Minimization sub stages are Physical Universalism ("cultures increasingly share so much in common") and Transcendent Universalism ("at heart we are all the same").

### Ethnorelative Stages

**Acceptance.** The first ethnorelative stage adopts a worldview that sees one's own culture as just one of many complex worldviews. People at this stage are curious about and respectful of differences. Although one may accept that there are differences and that one's own perspective is not superior, this does not mean that a person at the Acceptance stage necessarily agrees with other worldviews. The sub stages for Acceptance are Acceptance of Behaviors and Acceptance of Values.

**Adaptation.** In this stage, acceptance of another culture yields both perceptions and behaviors appropriate for effective functioning in that culture, as well as an ability to see the larger world in new ways. Adaptation entails intentional modification of behavior in order to interact with culturally different others. The two sub stages associated within Adaptation are Empathy and Pluralism.

**Integration.** The ultimate intercultural development stage is Integration, the ability and inclination to move in and out of different cultural worldviews. People who reach Integration may confront issues of cultural marginality as they work to integrate these shifting worldviews into their self-identity. Integration is not a required level of intercultural competence in most situations. It is common, however, among "global nomads" and others with extensive experience working at cultural intersections. The sub stages of Integration are Contextual Evaluation and Constructive Marginality.

Based on the DMIS, the *IDI* was structured with five scales and ten clusters, roughly matching the stages and sub stages of the DMIS. The *IDI* measure is comprised of the *DD* (Denial/Defense) scale, the *R* (Reversal) scale, the *M* (Minimization) scale, the *AA* (Acceptance/Adaptation) scale, and the *EM* (Encapsulated Marginality as a measure for Integration) scale.

The *IDI* includes 50 items, requiring the average person approximately 10 to 15 minutes to complete, and is available in paper-and-pencil format and online. There are twelve language versions—English, Spanish, French, Portuguese, Italian, German, Chinese, Japanese, Korean, Bahasa, Indonesian/Malay, Norwegian, and Russian. Results are reported in terms of level of development across the six stages, with developmental level ranging from "unresolved" to "in transition" to "resolved." If respondents are to receive feedback on their results, a requirement of administration is that they must always receive their feedback report as part of a counseling

session from an *IDI*-qualified facilitator.

Research on the validity and reliability of the *IDI* has found strong support for the internal reliability and validity of the psychometric properties of the instrument (Hammer, Bennett, & Wiseman, 2003; Paige, Jacobs-Cassuto, Yershova, & DeJaeghere, 2003). Studies of students (Straffon, 2003) and returned Peace Corps volunteers (Kashima, 2006) found the *IDI* predictive of level of intercultural sensitivity. Developers of the *IDI* also report similar findings for the *IDI* when used in business settings; however, because these results have not been made public through empirical studies published in peer-reviewed journals, it is not possible to independently confirm these findings.

## 5. *Multicultural Personality Questionnaire*

Developed by Van der Zee and Van Oudenhoven (2000), both at the University of Groningen, the *Multicultural Personality Questionnaire (MPQ)* measures five dimensions of personality relevant to adjustment and performance of expatriates. In developing the *MPQ*, dimensions were drawn from a review of earlier work on expatriate adjustment and from their own research. Moreover, the framing of dimensions is clearly done through the lens of the effective intercultural adjustment of expatriates.

**Cultural Empathy** ( $\alpha = .83$ ). This dimension relates to one's ability to empathize with people from a culture different from one's own. It also encompasses the ability to empathize with thoughts and behaviors of people from other cultures.

**Open-Mindedness** ( $\alpha = .84$ ). Effective intercultural behavior is also predicated on having an attitude that is open to differing cultural norms and to people from other cultures. Open-mindedness reflects an unprejudiced approach to others.

**Social Initiative** ( $\alpha = .89$ ). This dimension addresses the way that people approach social situations, recognizing that empirical work has confirmed the importance of taking the initiative and being active in establishing and maintaining relationships with people, both at home and abroad.

**Emotional Stability** ( $\alpha = .84$ ). The tendency to handle stressful situations calmly rather than with an affective response is important because novel or ambiguous situations can evoke strong emotion.

**Flexibility** ( $\alpha = .64$ ). This dimension focuses on a person's ability to adjust plans and behaviors easily. This is especially important in new cultural environments where one's established ways of doing things are likely to be inappropriate and must therefore be open to change and adaptation.

The *MPQ* contains 78 items and can be administered either online or via paper and pencil format. The average respondent requires about 15 minutes to complete the instrument. There are English, Dutch, French, German, and Italian versions available. Reviews of the *MPQ* do not appear to include any assessment of possible social desirability response patterns. Results are reported graphically for each dimension using a bar line and a 10-point scale, with 10 being highest. One or two sentences of explanation specific to each dimension score are also provided.

The majority of the research on the *MPQ* has been carried out with students; however, it has also been used in conjunction with expatriate assessment (Van der Zee & Brinkmann, 2004; Van Oudenhoven & Van der Zee, 2002). Two longitudinal studies conducted with international student samples found the *MPQ* predictive of psychological well-being and social support (Mol, Van Oudenhoven & Van der Zee, 2001; Van Oudenhoven & Van der Zee, 2002). A subsequent study of expatriates in Taiwan (Van Oudenhoven, Mol, & Van der Zee, 2003) confirmed the *MPQ*'s predictive capability with regard to three facets of personal adjustment (satisfaction with life, physical health, and psychological well-being), job satisfaction, and social support.

## 6. *Intercultural Readiness Check*

The *Intercultural Readiness Check (IRC)* assessment, developed by Van der Zee and Brinkmann (2004), is apparently an extension of the *Multicultural Personality Questionnaire*, discussed above. The *MPQ* instrument was developed with a specific focus on expatriates, whereas the *IRC* seems aimed at application to a broader range of personnel, not just those slated for international assignments.

The original *IRC* measured six dimensions that the developers (Van der Zee & Brinkmann, 2004) argued were relevant to multicultural success: intercultural sensitivity ( $\alpha = .80$ ), intercultural communication ( $\alpha = .84$ ), intercultural relationship building ( $\alpha = .80$ ), conflict management ( $\alpha = .59$ ), leadership ( $\alpha = .70$ ), and tolerance of ambiguity ( $\alpha = .78$ ). However, subsequent refinement of the instrument settled on the four dimensions immediately below. Reliability alphas on these four scales do not appear to have been reported.

**Intercultural Sensitivity.** The focus of this dimension is on the awareness and perception of culturally different communication styles (e.g., the ability to notice and accurately read verbal and nonverbal communication). It also measures interest in differing cultural norms and values. This dimension has two facets: cultural awareness and attention to signals.

**Intercultural Communication.** This dimension measures an individual's ability to empathize with people who are culturally different. It is concerned not only with feelings, but also with thoughts and behavior. This dimension has two facets: active listening and adjusting communicative styles.

**Building Commitment.** Motivating others, nurturing interaction, and cooperation and leading out while maintaining support and commitment from others, is the focus of this dimension. The two facets for this dimension are: building relationships and reconciling stakeholder needs.

**Managing Uncertainty.** Intercultural situations are characterized by uncertainty around meanings, norms, and behaviors. This dimension assesses ability to cope with intercultural situations. The two facets for this dimension are: openness to cultural complexity and exploring new approaches.

The *IRC* is a 60-item instrument and can be administered either online or via paper and pencil format. The average respondent requires 10 to 15 minutes to complete the instrument. There are English, Dutch, French, German, and Japanese versions. There does not appear to be any monitoring of social desirability response patterns. Results are reported using a graphical presentation and index, with additional commentary provided for each of the four dimensions.

The developers of the *IRC* provide generalized anecdotal evidence for their predictive capability relative to superior performance in jobs entailing a large intercultural component. However, statistical data supporting these claims have not been made public through empirical studies published in peer-reviewed journals. Nevertheless, the convergent validation of the *IRC* vis-à-vis the *MPQ* suggests a basis for assuming some measure of predictive capability and association with positive outcomes in intercultural situations (Van der Zee & Brinkmann, 2004). Moreover, the authors claim a database of 25,000 respondents drawn from 130 countries and across 14 industries.

## 7. *Cultural Intelligence (CQ)*

Developed by Earley and Ang (2003), and predicated on the broader conceptual notion of multiple intelligences, the *Cultural Intelligence (CQ)* assessment measures four dimensions relevant to their conceptualization of cultural intelligence, which they define as being able to function effectively in cross-cultural situations. Earley and Ang (2003) assert that cultural intelligence constitutes a type of intelligence akin to, but independent from, other previously identified intelligences, such as emotional and cognitive intelligence. The *CQ*'s four dimensions encompass cognitive, metacognitive, motivational, and behavioral elements of effective cross-cultural elements, which is consistent with other conceptualizations of cultural

intelligence (Livermore, 2010; Thomas, 2006).

**CQ Drive (Motivational CQ).** As the name implies, this dimension relates to one's level of interest or drive in adjusting to encountered cultural differences. It has three sub-dimensions: *Intrinsic Motivation*, which refers to the degree to which someone derives enjoyment from culturally diverse situations and experiences; *Extrinsic Motivation*, which addresses the degree to which external rewards (e.g., compensation, career advancement, etc.) are motivating forces encouraging intercultural action; and *Self-Efficacy*, which reflects one's confidence in being able to successfully navigate culturally diverse interactions.

**CQ Knowledge (Cognitive CQ).** A second element of effective intercultural action is a knowledge of relevant cultural issues, including a general understanding of culture and how it influences perceptions, cognitions, and behaviors as well as specific information regarding the cultures one will be working in. This dimension has the following two sub-dimensions: *Cultural Systems* refers to one's understanding of the ways that societies are arranged (e.g., family structures, social institutions, etc.), whereas *Cultural Norms and Values* addresses one's understanding of how such things shape thinking and behavior.

**CQ Strategy (Metacognitive CQ).** The third dimension of the *CQ* assessment focuses on how individuals process intercultural situations and select responses. This is also labeled the *Metacognitive* dimension because it reflects an approach to navigating situations, rather than to the actual act of navigation. It has three sub-dimensions: *Awareness* refers to the extent to which one is sensitive to the situation; *Planning* considers how one anticipates and prepares for an interaction; and *Checking* examines the degree to which one monitors interactions to determine whether behavior aligns with perception and plan.

**CQ Action (Behavioral CQ).** This final dimension focuses on the adjustment of behavior so that it is appropriately adaptive to the situation. It has three dimensions, which align with the types of behaviors in an encounter: *Nonverbal Actions*, *Verbal Actions*, and *Speech Acts*. The last dimension refers to the specific words and phrases employed.

The *CQ* consists of 20 items and is administered online, and respondents require about 10 minutes on average to complete the instrument. A multi-rater version is also available. Currently there are English, Dutch, French, German, and Italian language options. There is no monitoring of social desirability response patterns. Results are provided in a 12-page feedback report that includes comparisons with norms based on worldwide samples. Additionally, the report includes supporting material to aid in further development of *CQ* dimensions.

The developers (Ang, Van Dyne, Koh, & Ng, 2004) conducted a variety of statistical analyses to determine the reliability and validity of the *CQ*. Their reported results are consistent with accepted standards of internal consistency and factor structures. In a study of expatriate adjustment, Templer, Tay, and Chandrashekar (2006) found that *CQ Drive* (Motivational CQ) was predictive of both general and work adjustment in a sample of 157 global professionals working in Singapore. More recently, Ward and associates (2009) reported on a series of empirical studies that raise several questions about the conceptual foundations of the cultural intelligence construct as measured by the *CQ*. Though argued to be a distinct intelligence, they study found that the *CQ* exhibited high convergence on measures of emotional intelligence (EQ), which suggests that *CQ* may not be a separate construct and therefore, that the *CQ*'s underlying construct validity may be untenable. In a second study reported by Ward and associates (2009), *CQ*, with the exception of *Motivational CQ*, did not contribute incremental prediction in explaining social adaptation in a sample of 118 international students in New Zealand. Moreover, *CQ* added no incremental value in explaining academic adaptation or language acquisition.

## **8. Big Five Personality Inventories**

In the early 1960s, psychologists doing research on personality characteristics carried out a review of a number of empirical studies and found five recurring traits. In the 1980s, Costa and McCrae (2010) developed a standardized taxonomy that labeled the five factors as: Neuroticism, Extraversion, Openness to Experience, Agreeableness, and Conscientiousness. There are several terms that apply to this taxonomy of personality

characteristics, such as The Big Five, The Five Factor Model, and the Five Factor Theory. It is also important to note that these broad factors (described in detail below) encompass a wide range of more discrete personality traits. Consequently, most instruments that measure the broad five personality factors also measure a variety of discrete sub-facets. In the case of the *NEO PI-R*, for instance, the broad five factors have six sub-facets associated with each of them.

Whether personality traits are able to predict performance has been an ongoing debate. However, a number of recent meta-analytical studies have found conclusive support for their incremental predictive validity of moderate magnitude beyond other measures, such as cognitive ability. For example, Saulsman and Page (2004) undertook a review of 15 different studies and found a distinct profile of the five factors for each of 10 mental health disorders listed in the *Diagnostic and Statistical Manual of Mental Disorders* (DSM-IV). In the realm of job performance, Barrick and Mount (1991; see also Mount & Barrick, 1998) completed a meta-analytic review covering 23,994 subjects from 162 samples in 117 studies and concluded that Conscientiousness consistently predicted performance across all jobs and all occupations. They also found that Extraversion was predictive of superior performance in occupations where social interactions were essential (e.g., sales and management).

**Neuroticism** ( $\alpha = .92$ ). This factor addresses emotional stability and focuses on whether people experience primarily negative emotions (e.g., anxiety, hostility, anger, depression, etc.). An inclination to respond to situations with negative interfering emotions is also an aspect of Neuroticism.

**Extraversion** ( $\alpha = .89$ ). This factor refers to a person's orientation toward engagement with others and the external world. Extraverts are characterized as outgoing, people-oriented, energetic, and action-oriented and have the predisposition to be favorably energized by social engagements and interactions. They are more inclined to reach out and initiate connections with others, to talk most in groups, and to be more assertive in social settings.

**Openness to Experience** ( $\alpha = .87$ ). This factor describes the trait of being innately curious and having an active and creative imagination. Being open to people and to experiences are also aspects of this factor, which is usually referred to simply as Openness. An appreciation of art, intellectual curiosity, and an interest in complex or sophisticated ideas are also a part of this predisposition.

**Agreeableness** ( $\alpha = .86$ ). This factor describes the extent to which people value social harmony and cooperation, and are predisposed to be attentive and concerned with getting along with others. Optimism and a positive view of human nature—that is, the view that people are basically trustworthy—are also a part of this trait.

**Conscientiousness** ( $\alpha = .90$ ). This factor relates to how a person regulates and controls impulses, and is able to stay focused on necessary tasks and required duties and follow through on commitments. The inclinations to act spontaneously or to be able to delay gratification are also associated with this factor. This factor also encompasses an individual's achievement orientation.

There are a variety of instruments that measure the Big Five personality traits, but among the more widely used is the *NEO PI-R*, developed by Costa and McCrae (Costa & McCrae, 2010; De Fruyt, McCrae, Szirmak, & Nagy, 2004). The *NEO PI-R* contains 240 items and broadly measures neuroticism, extraversion, openness, agreeableness, and conscientiousness, along with six discrete sub-facets for each of its five broad factors. The assessment takes approximately 45 minutes to complete and is available via paper-and-pencil format or software loaded onto a computer but is not yet online. Though numerous language versions have been developed for research purposes, it is widely available in English and Spanish for commercial purposes. Distribution and sale of the *NEO PI-R* is governed by the professional standards of the American Psychological Association, which means users must demonstrate an appropriate level of coursework or advanced training in both the theory and measurement of human personality.

Early studies examining the ability of personality traits to predict expatriate performance were generally negative (Brislin, 1981; Harris, 1973, 1975). More recently, however, a large and growing number of empirical

studies have found support for the use of Big Five personality measures in predicting cross-cultural effectiveness and expatriate performance (Ones & Viswesvaran, 1999). For example, Caligiuri (1995, 2000) found that emotional stability (i.e., neuroticism) was predictive of expatriate adjustment. Deller (1998) found that ambition (a facet of conscientiousness) and several facets of openness were predictive of expatriate job performance. In a similar vein, Sinangil and Ones (1995, 1997) also found facets of conscientiousness and openness to be predictive of expatriate job performance. And finally, Dalton and Wilson (2000) studied expatriate managers in the Middle East and found that agreeableness and openness were predictive of home-country ratings of performance, but not predictive of host-country ratings.

## Global Leadership Competency Assessments

In this section, we consider several instruments that have adopted a broader focus and attempt to identify a variety of leadership competencies—not just intercultural competence. Similar to the intercultural adaptability assessments in the preceding section, there are numerous commercial global leadership competency assessments available, but for which there is scant, if any, publicly available independent peer-reviewed research literature. For that reason, they were not included in this section. Likewise, we have not considered the broad range of widely used leadership assessments that were not developed for assessing global leadership competencies, but are nevertheless used in expatriate and cross-cultural contexts.

### 9. Global Mindset Inventory

The *Global Mindset Inventory (GMI)* was developed under the direction of Thunderbird School of Global Management's Global Mindset Institute to assess the characteristics needed for global leaders to effectively influence people from cultures different from their own. The conceptual basis for the inventory's dimensions drew upon the collective input of academicians expert in the domain, as well as responses from hundreds of global executives interviewed for the project. Although the authors of the *GMI Technical Report* quite improperly assert that it is "the world's first and only psychometric assessment tool that measures and predicts performance in global leadership positions" (Javidan, Hough, & Bullough, 2010: 4), the inventory nonetheless may rightly be recognized for its solid conceptual foundation and rigorous empirical development. A rich and detailed *Technical Report* is provided openly at the Institute's website ([www.globalmindset.com](http://www.globalmindset.com)), and provides exemplary documentation on the process by which the *GMI* was developed and evaluated for its validity.

According to Javidan, Teagarden, and Bowen (2010), global mindset is a concept that consists of three broad individual characteristics, having three discrete facets each, arranged as follows:

**Intellectual Capital** ( $\alpha = .94$ ): This dimension consists of a deep knowledge and understanding of the global business environment, industry, and value chain, as well as the capacity to learn and understand the context at a global level. It is comprised of the three following discrete facets:

**Global Business Savvy** ( $\alpha = .94$ ). This refers to one's grasp of worldwide industry and business operations, the behavior and habits of one's global customers, and the strategic risks associated with operations in different parts of the world.

**Cognitive Complexity** ( $\alpha = .93$ ). This describes one's capacity for connecting complex scenarios with many elements, along with the capacity to make decisions and act appropriately in the face of many options.

**Cosmopolitan Outlook** ( $\alpha = .85$ ). This relates to an active interest in the geography, cultures, histories, and socio-economic systems that can be found in many different parts of the world.

**Psychological Capital** ( $\alpha = .89$ ): This dimension consists of the mental and emotional flexibility, openness to cultural adventure, and self-assurance needed to operate successfully in a new cultural environment. It is comprised of the three following discrete facets:

**Passion for Diversity** ( $\alpha = .91$ ). This refers to one's proclivity for experiencing new and different parts of the

world, unfamiliar cultures, and novel ways of doing things.

**Thirst for Adventure** ( $\alpha = .82$ ). This describes one's capacity for deriving enjoyment—even pleasure—from multifaceted and unfamiliar environments.

**Self-Assurance** ( $\alpha = .78$ ). This relates to one's level of self-confidence and capacity for taking risks, especially in new situations, as well as the tendency to be energized rather than enervated by a foreign environment or culture.

**Social Capital** ( $\alpha = .89$ ): This dimension consists of the propensity to develop and maintain authentic relationships with individuals from different cultures or regions of the world, as well as the capacity to build consensus and influence essential stakeholders from cultures and backgrounds that are different from one's own. It is comprised of the three following discrete facets:

**Intercultural Empathy** ( $\alpha = .89$ ). This refers to one's tendency for understanding and emotionally connecting with people from different cultures or regions of the world.

**Interpersonal Impact** ( $\alpha = .68$ ). This describes one's capacity to build credibility and maintain social networks when working with people from divergent backgrounds, cultures, and life experiences.

**Diplomacy** ( $\alpha = .80$ ). This relates to one's propensity for conversation, especially through asking and listening (rather than answering), with persons who are different from oneself.

The current version of the *GMI* attempts to measure the above dimensions via 76 survey questions, 50 of which are referred to by the developers as “global mindset items” and 26 as demographic. There is no mechanism for monitoring social response bias in the *GMI* inventory. Once the *GMI* survey questions have been answered and a profile report is generated, care must be taken not to over interpret the implications of the profile results. Specifically, the *GMI* feedback report uses language that purports to describe a respondent's level of skill or ability on the various *GMI* dimensions (e.g., knowledge of the global business environment, ability to grasp complex concepts quickly, knowledge of different world cultures, wittiness in tough situations, ability for diplomacy, etc.). However, the inventory nevertheless simply asks respondents to make self-evaluations (on a 5-point scale) of the degree to which they believe they possess these various *GMI* global leadership knowledge, skills, and abilities. While such self-evaluation surveys often can serve as an appropriate methodology for assessing important individual psychological differences on global leadership competencies, those who administer and wish to interpret the *GMI* would be wise to make sure they understand the inherent difference between a respondent's own self-scoring of the possession of *GMI* knowledge, skills, and abilities, as opposed to the actual possession of those attributes (i.e., self-evaluations of one's diplomacy skills or one's ability to grasp cognitively complex ideas are not the same as actually possessing those competencies).

A variety of statistical analyses were conducted to determine that the *GMI* items indeed have the desired levels of internal consistency and factor structures. The *GMI Technical Report* also reports evidence of predictive validity via statistical correlations between *GMI* scores and performance-related criterion measures at two large companies. The magnitude (or effect size) of the reported correlations appears to be within the ranges consistent with general expectations for such studies (Javidan, Hough, & Bullough, 2010); nevertheless, it is unclear from the descriptions of these two predictive studies whether the criterion-related performance data were collected from respondent self-reports or from independent sources of multi-rater evaluations.

The *GMI* is Internet-based, comes in two formats (a self-assessment and a 360-evaluation version), and provides both individual and group reports. Participation in a *GMI* certification program is necessary to become qualified as an administrator to use the inventory and conduct debrief sessions with respondents. Current information states that the *GMI* has been administered to more than 23,000 respondents from over 70 countries, many of whom are reported to be in managerial or global executive positions. Upon completing the *GMI*, respondents are encouraged to attend a one-day debriefing workshop to better understand their individual profile, their group's profile, and the importance for their organization, and to consider action planning strategies for improving global mindset in targeted areas.

## ***10. Global Competencies Inventory***

Initially developed in 2000 by Stevens, Bird, Mendenhall, and Oddou (2014), the *Global Competencies Inventory (GCI)* measures 17 dimensions of personality predispositions associated with effective intercultural behavior and dynamic global managerial skills acquisition. The dimensions are predicated on an elaboration of the expatriate adjustment model developed by Black, Mendenhall, and Oddou (1991) and accordingly, are grouped under three factors: Perception Management, Relationship Management, and Self-Management. These three factors and their associated sub-dimensions are presented below. Additionally, the *GCI* has been mapped onto the global management competency model developed by Bird and Osland (2004).

### ***Perception Management ( $\alpha = .91$ )***

This factor encompasses five sub-dimensions that address how individuals mentally approach cultural differences. How individuals perceive people who are different from themselves affects how they think about such people, and in turn, the way people think about individuals who are different from themselves influences their opinions, their evaluations, and ultimately their behavior toward culturally different others. This factor also assesses how mentally flexible an individual is when confronted with cultural differences that are strange or novel, as well as any tendency to make rapid (rather than thoughtful) judgments about those differences. It also evaluates an individual's capacity to manage perceptions when faced with situations that are not immediately easy to understand because they differ from experience or expectations. This factor also assesses an individual's natural curiosity toward foreign countries, cultures, and international events, as well as tendencies to draw sharp boundaries between things that may be viewed as different. Perception Management consists of the following five sub-dimensions:

***Nonjudgmentalness*** ( $\alpha = .72$ ). This dimension considers an individual's propensity to suspend or withhold judgments about situations or persons that are new or unfamiliar.

***Inquisitiveness*** ( $\alpha = .84$ ). This dimension assesses an individual's inclination to understand ideas, values, norms, situations, and behaviors that are different one's own. It also addresses an individual's capacity to take advantage of learning opportunities.

***Tolerance of ambiguity*** ( $\alpha = .73$ ). This dimension measures the extent to which individuals are able to manage ambiguity that derives from new and complex situations where there are no clear answers about what is going on or how things should be done. It also considers whether they enjoy surrounding themselves with ideas or things that are novel and unfamiliar, rather than feeling threatened by them.

***Cosmopolitanism*** ( $\alpha = .85$ ). This dimension measures the level of natural interest in and curiosity about countries and cultures that are different from one's own. It also assesses the degree to which individuals are interested in current world and international events, would enjoy traveling abroad, and actively take the initiative to act on such interests.

***Interest Flexibility*** ( $\alpha = .83$ ). This dimension measures flexibility in identifying and adopting new interests, hobbies, and changes in one's daily routine when normal activities and other outlets are not available. The ability to find new interests reflects a willingness and capacity to look at things in a different way. An example of interest flexibility would be someone who enjoys baseball but seeks to learn about cricket when living in a country where cricket is more popular.

### ***Relationship Management ( $\alpha = .93$ )***

This second broad factor of the *GCI* assesses a person's orientation toward developing and maintaining relationships in general—that is, how aware someone is of others around them, their interaction styles, values, and so on. It also considers an individual's personal level of self-awareness and awareness of how their

behaviors impact others. This factor complements the Perception Management factor because it examines how personal attitudes, values, and beliefs influence the development and management of interpersonal relationships in a cross-cultural environment. Positive relationships in an intercultural environment are essential for effective performance in the global workplace. Relationship Management consists of the following five sub-dimensions:

**Relationship Interest** ( $\alpha = .76$ ). This dimension considers the extent to which someone has a genuine interest in, and awareness of, people who are from other cultures or ethnic groups. It also reflects a person's desire to get to know them, their values, and why they do what they do, and have the views and opinions they have.

**Interpersonal Engagement** ( $\alpha = .80$ ). This dimension evaluates the extent to which individuals are likely to initiate and maintain friendships with people from other countries or cultural groups. It also measures how inclined people are to actively seek out others who are different, as well as their desire and ability to engage with such persons in interesting conversations.

**Emotional Sensitivity** ( $\alpha = .74$ ). This dimension considers the capacity to accurately read and comprehend the emotions of others and to understand their feelings from their perspective. It also measures how well individuals are able to listen genuinely and respond with empathy to the circumstances and challenges others face.

**Self-Awareness** ( $\alpha = .73$ ). This dimension assesses the extent to which individuals are aware of their own values and interpersonal style, personal strengths and weaknesses, and how their experiences have helped shape who they are as people. It also measures how well individuals claim to know themselves, how comfortable they are with themselves, and the extent to which they understand the impact of their personal values and behavior on their relationships with others.

**Behavioral Flexibility** ( $\alpha = .72$ ). This dimension measures a person's tendency to regulate and adjust their behavior to fit in and to present themselves to others in ways that create positive impressions and facilitate the building of constructive relationships.

### Self-Management ( $\alpha = .92$ )

This third factor of the *GCI* assesses the strength of a person's self-identity and the capacity to effectively manage thoughts, emotions, and responses to stressful situations. To be effective in cross-cultural situations, people must be capable of understanding, changing, and adapting appropriately to a global work environment and challenging cultural differences while at the same time having a clear and stable sense of who they are as individuals, which includes an unambiguous understanding of their most fundamental values. The ability to adapt and change within the context of a stable self-identity is critical to remaining mentally and emotionally healthy in a new cultural environment. Self-Management consists of the following six sub-dimensions:

**Optimism** ( $\alpha = .74$ ). This dimension considers the extent to which someone maintains a positive outlook toward people, events, and outcomes generally, and views challenges as learning opportunities. New intercultural environments are almost always stressful, so facing such situations with a naturally positive outlook invariably improves an individual's ability to cope and adjust.

**Self-Confidence** ( $\alpha = .83$ ). The self-confidence dimension assesses the level of personal belief in one's ability to achieve whatever one decides to accomplish, even if it is something that has never been tried before. Such a predisposition increases the likelihood that individuals can access the emotional wherewithal to persevere in new cultural environments that prove to be challenging or frustrating.

**Self-Identity** ( $\alpha = .73$ ). This dimension considers a person's ability to maintain his or her personal values and beliefs regardless of the situation. A strong self-identity means an individual has strong personal values and can maintain a high sense of personal integrity while at the same time remaining openly accepting of those

who are different, without feeling personally threatened.

**Emotional Resilience** ( $\alpha = .81$ ). This dimension measures one's level of emotional strength and ability to cope favorably with irritations, setbacks, frustrations, and failures. It also assesses the capacity to recover quickly from psychologically and emotionally challenging situations.

**Non-Stress Tendency** ( $\alpha = .81$ ). This dimension assesses an individual's innate capacity to respond with peacefulness, serenity, and equanimity to potentially stressful situations or circumstances, whether they are derived from different sources or from a wide range of stressors.

**Stress Management** ( $\alpha = .74$ ). This dimension considers the degree to which individuals report actively utilizing stress reduction strategies and techniques when faced with stressors in daily life, as well as the degree to which they are willing to employ new stress reduction techniques in the future.

The *GCI* contains 180 items and is only available via online administration. It currently is available in nine languages (English, Chinese, French, German, Japanese, Spanish, Portuguese, Korean, and Arabic). The average respondent requires approximately 45 minutes to one hour to complete the assessment. The current version of the *GCI* (i.e., version 3.1) provides an individualized feedback report that gives results for each of the *GCI*'s 17 dimensions, three broad factors, and an Overall Competency. Profiles are generated by comparing individual scores to a worldwide normative database of more than 35,000 respondents to date. A Social Desirability (SD) scale ( $\alpha = .83$ ) is also included; although the SD results are not explicitly reported to respondents, administrators are able to ascertain the SD score because it is discretely embedded on the cover page of the individual feedback reports. Administrators can use results on the SD scale to determine the likelihood that respondents may have answered the *GCI*'s self-report items with the intent to elicit favorable scores.

Longitudinal research (Furuya, 2006; Furuya, Stevens, Bird, Oddou, & Mendenhall, 2009) conducted with samples of Japanese international managers linked overall *GCI* scores with higher levels of "hard" measures of global competencies learning and acquisition. Specifically, higher *GCI* scores were related to higher levels of three types of skill outcomes: 1) *global business acumen*, consistent with the formulation put forward by Black, Morrison, and Gregersen (1999) of savvy use of extensive knowledge about business in a worldwide context; 2) *employee management skills*, which correspond closely to Bird and Osland's (2004) conceptualization of interpersonal skills (i.e., mindfulness of intercultural communication, creating and building trust, and teaming); and 3) *global administrative skills*, which corresponds to Bird and Osland's (2004) description of the system skills of spanning boundaries, managing change through building community, and leading. Higher *GCI* scores were also associated with higher levels of skill transfer upon repatriation, increased motivation and attachment to the employer, and higher levels of general work performance as measured by supervisor evaluations. A more extensive review of the *GCI*'s convergent, differential, and predictive validities (including prediction of foreign language acquisition), is provided by Stevens et al. (2014).

## **11. Global Executive Leadership Inventory**

Kets de Vries and associates (Kets de Vries, Vriegnaud, & Florent-Treacy, 2004) developed the *Global Executive Leadership Inventory (GELI)* out of extensive work with executives involved in training programs at INSEAD. They concluded that most leadership inventories rely on data collected by means of self-report questionnaires, which suffer from an inherent subjectivity bias. They also noted that the gap between a leader's personal assessment of capabilities and the assessments of those capabilities by others was often significant. They thus settled on a 360-degree feedback approach as a means of identifying levels of competency and also of identifying awareness gaps in those competencies. Drawing on prior leadership research and on interviews with global executives, the *GELI* developers identified two broad roles that global leaders carry out—one being primarily charismatic (i.e., inspiring, directing, and motivating others), and a second primarily architectural (i.e., designing systems and processes to help make the organization and people within it effective). These two broad roles were broken down into twelve sub-dimensions, which are presented below.

**Visioning** ( $\alpha = .77$ ). This dimension addresses a leader's ability to develop and articulate a vision and accompanying strategy that encompass the firm's global needs and are accessible and can be embraced by all stakeholders (e.g., shareholders, employees, suppliers, and customers).

**Empowering** ( $\alpha = .80$ ). Finding ways to empower employees throughout the firm by means of information sharing and delegation of authority comprises this second dimension.

**Energizing** ( $\alpha = .82$ ). The third leadership dimension involves the ability to energize and motivate employees to bring the firm's mission to reality.

**Designing and Aligning** ( $\alpha = .84$ ). This dimension focuses on the propensity to design organizational structures and control systems appropriate for the effective functioning of the firm at a global level consistent with the firm's mission, vision, and strategy. It also encompasses the ability to direct employee behavior consistent with organizational culture and values.

**Rewarding and Feedback** ( $\alpha = .87$ ). Effective global leaders must also be able to establish and implement performance appraisal and reward systems that drive the right employee behaviors on a global level.

**Team Building** ( $\alpha = .85$ ). This dimension addresses the capacity to design, motivate, and focus teams to effectively work across time, space, and diversity. It also entails the capacity to foster an organizational climate that encourages collaborative effort and the constructive use of conflict.

**Outside Orientation** ( $\alpha = .82$ ). This dimension emphasizes the ability to direct employee awareness and attention to external constituencies, such as customers, suppliers, and other stakeholders, including local communities.

**Global Mindset** ( $\alpha = .87$ ). This refers to fostering among employees at all levels an awareness and knowledge of the global context in which the firm operates. This dimension also encompasses a sensitivity and ability to work across cultures.

**Tenacity** ( $\alpha = .76$ ). Effective global leaders must also have courage and persistence in pursuing those ends that serve the firm's purposes and are consistent with firm and personal principles. Leading by example, effective global leaders should also encourage others to do likewise.

**Emotional Intelligence** ( $\alpha = .91$ ). The creation and maintenance of trust and the fostering of an emotionally intelligent organization is another capability found in effective global leaders who are self-aware and able to work with others in a respectful and empathetic manner.

**Life Balance** ( $\alpha = .79$ ). Global leadership extends beyond the boundaries and mission of the organization and into non-work life through the capacity to maintain balance in work and personal life necessary to maintain the long-term welfare of the individual. Effective leaders are able not only to model this behavior but articulate it in ways that impact those with whom they work and for whom they are responsible.

**Resilience to Stress** ( $\alpha = .84$ ). This final dimension addresses a leader's ability to manage multiple types of stressors—such as work, life, health, and career—and manage such pressures so that that balance can be maintained.

The *GELI* is designed as a 360-degree feedback assessment. In order to generate viable reports, it is essential that at least two observers—typically a supervisor or boss, coworker, direct report, or close acquaintance—complete the observer's portion of the instrument. Both the Leader and Observer versions of the *GELI* contain 100 items and can be administered either online or via paper-and-pencil format. The average respondent requires from 15 to 20 minutes to complete the instrument. Observers also have the option of providing written comments that elaborate on their survey responses. There are English, Dutch, French, German, and Italian versions of the *GELI* available. There does not appear to be any monitoring of social desirability response patterns. The results are provided via a feedback report that presents the respondent's scores based on norms

drawn from the more than 2,000 executives who initially completed the inventory during its development phase. The respondent's scores are also presented relative to observers' scores for each of the 12 dimensions. Where sufficient numbers are available, observer scores are presented in aggregate, and by observer group (i.e., managers, direct reports, peers, etc.). In this regard, the *GELI* presents a type of gap analysis similar to that of the *GLO* (described below).

Research on the internal validity of the *GELI* found support for the psychometric properties of the instrument (Kets de Vries, Vrignaud, & Florent-Treacy, 2004), and developers of the *GELI* report that it is highly predictive of executive performance in organizations (Kets de Vries, 2005). However, because these results have not been made public through studies published in peer-reviewed journals, it is not possible to independently confirm these reports of validity.

## **12. Global Leadership Online**

Based upon research by Gundling and his colleagues at Aperian Global (Gundling, Hogan, & Cvitkovich, 2011), the *Global Leadership Online (GLO)* was developed for use primarily in business settings. The *GLO* measures five dimensions, the initial letters of which form the acronym SCOPE. The dimensions and facets were developed based on the authors' interviews of 70 international assignees. Of the interviewees, 56 participants had been on multiple assignments, were drawn from 26 countries, and had worked in 32 different destination countries.

**Seeing Differences** is the first dimension and involves the ability to notice important cues. It is comprised of the following two sub-facets: *Cultural Self-Awareness* (i.e., the extent to which leaders are aware of how their own cultural experiences influence their perceptions); and *Inviting the Unexpected* (i.e., a person's openness to new situations, new ideas, and new people and the differences they introduce).

**Closing Gaps** is the second dimension. Once global leaders identify differences, the next act of leadership involves finding ways to close the gaps between the differences. It is comprised of the following two sub-facets: *Results through Relationships* (i.e., the extent to which a person is able to work through interpersonal relationships and personal networks to achieve results); and *Frame Shifting* (i.e., the extent to which a person is able to change their cognitive and behavioral styles to accommodate different contexts).

**Opening the System** is the third dimension and considers the degree to which leadership across a global organization requires an ability to exercise influence beyond one's personal network; the influence must extend to the system level, and it must bring more people into the process. It has the following two sub-facets: *Expand Ownership* (i.e., the extent to which leaders are able to engage others and have them share responsibility for achieving objectives); and *Develop Future Leaders* (i.e., the capacity to foster the development of others who will take on leadership responsibility in the future).

**Preserving Balance** is the fourth dimension and reflects the requirement of global leaders to address the competing demands of adapting to the context and adding value through what they bring to the context. Its two sub-facets include: *Adapting and Adding Value* (i.e., the extent to which a person can adapt to the demands of the situation while also adding value by contributing new perspectives or new skills and knowledge); and *Core Values and Flexibility* (i.e., the capacity to retain one's core values and also understand how to apply those values flexibly to new settings, as well as a willingness to incorporate differing facets or nuances of one's core values that may surface through global work).

**Establishing Solutions** is the final dimension and focuses on the implementation of changes. It is comprised of the two following sub-facets: *Influence across Boundaries* (i.e., the capacity to work across boundaries—be they business units, functional or organizational); and *Third Way Solutions* (i.e., the ability to draw upon all of the other dimensions and facets to craft creative and appropriate solutions).

The *GLO* includes 60 items, including qualitative responses, and is administered online. The average

respondent requires about 15 minutes to complete the inventory. The assessment has two components—a self-assessment and a multi-rater assessment. There is no mechanism for monitoring social response bias. Results are presented in the form of numerical scores that indicate strengths as well as areas for improvements. Qualitative comments from raters are also incorporated into the report. Information on the reliability and validity of the *GLO* is not publicly available at this time. The recency of its development helps explain the lack of independent empirical studies published in peer-reviewed journals.

## Conclusion

It is important to remember, as was pointed out in [Chapter 2](#), that the field of global leadership is still in its infancy, with no established definition and no accompanying set of clearly defined behaviors. Given the nature of the phenomenon, it may be unrealistic to expect that this will be resolved any time soon. Nevertheless, work has begun on several fronts to identify competencies associated with effective global leadership. With two exceptions—the *NEO PI-R* and the *CCAI*—none of the assessments considered in this chapter existed twenty years ago. Indeed several have appeared in just the past several years. We can therefore reasonably anticipate that as global leadership achieves greater clarity as a concept, more assessments will be developed.

A side-by-side comparison of the twelve intercultural and global leadership assessments reviewed in this chapter is instructive. [Table 5.1](#) presents basic information about the content domain measured by the assessments, their validity, their reliability, and various aspects of their usage.

For the most part, the assessments considered in this chapter have demonstrated sound psychometric properties with regard to reliability and internal validity. Additionally, while many also have demonstrated expected convergent and discriminant validity, there is still a critical issue concerning their utility at generating scores and respondent profiles that are predictive of superior global leadership performance. On that point, except for a few measures reviewed in this chapter, there is a paucity of evidence. Nevertheless, there is perhaps reason to be optimistic; when not restricted to global leadership, but considered in the context of performance more broadly defined, there is more evidence to support predictive validity claims. We may thus reasonably anticipate that more empirical research exploring their predictive potential is likely to emerge in the foreseeable future.

Where do we go from here? This chapter began by discussing *competency* as a concept and noted that it involved a link between a pre-existing characteristic or capability and superior performance. The assessments considered here measure a variety of characteristics that could be classified as competencies, but what is sorely missing is a clearly established set of behaviors that constitute *superior* global leadership. Both the *GLO* and *GELI* attempt to address this issue by focusing on managerial actions and behaviors as observed by others, but even these two instruments have been unable to identify the specific set of actions appropriate to a specific position.

Future work might proceed along two lines, both of which involve “flying a little close to the ground.” First, it would be useful to learn more about what effective global leaders actually do. As noted in [Chapter 2](#), most empirical research has asked managers to describe what they *think* are the important or critical behaviors for global leaders. This approach runs into the challenge noted early in this chapter of developing an *idealized* rather than a real or *practical* understanding of what global leaders do. Research that observes and measures actual performance may be more productive in establishing the behavioral standards necessary to work backward in the causal link to competencies. Second, most of the assessments in this chapter focus on soft competencies—that is, characteristics of personality, worldview, or attitude. This may seem appropriate given that global leadership appears to fit into a wide variety of contexts and positions where soft competencies are more broadly applicable. However, it will likely prove more useful to emphasize hard competencies along the lines of identifiable skills or behaviors that contribute to high performance. For example, do global leaders who engage in more reflective listening behaviors perform at higher level than those who do not? Reflective listening is a hard competency, a skill that can, to varying degrees, be developed through practice and application. It is also a skill that we might expect to contribute to more effective intercultural communication, which in turn would contribute to other effective leader behaviors. With such a skill-based approach to global leadership, we are optimistic that both assessments and the subsequent professional development activities and treatments that invariably follow will likely find greater traction in the domain of global leadership competencies where much is at stake.

[Table 5.1 Comparison of Intercultural and Global Leadership Assessment Tools](#)

|                                  | <b>Cross-Cultural Adaptability Inventory</b>                        | <b>Global Competencies Aptitude Assessment</b> | <b>Intercultural Effectiveness Scale</b>                    | <b>Intercultural Development Inventory</b>            | <b>Multicultural Personality Questionnaire</b> | <b>Intercultural Readiness Check</b>     |
|----------------------------------|---|--|---|---|--|--|
| <b>Acronym</b>                   | 1. CCAI   | 2. GCAA  | 3. IES  | 4. IDI  | 5. MPQ   | 6. IRC                                   |
| <b>Reliability</b>               | Low   | Moderate                                       | High  | High  | High   | High                                     |
| <b>Validity: content</b>         | Moderate  | Moderate                                       | High  | High  | High   | High                                     |
| <b>predictive</b>                | Low   | ?  | Moderate  | Not recommended                                       | Moderate                                       | N/A                                      |
| <b>convergent</b>                | ?   | ?  | High  | High  | High   | Moderate                                 |
| <b>face</b>                      | High  | High   | High  | High  | High   | Moderate                                 |
| <b>differential bias</b>         | ?   | ?  | No  | No  | ?  | ?  |
| <b>Social Desirability Check</b> | No  | No   | No  | No  | No   | No                                       |
| <b>Cost</b>                      | \$6–12  | \$20   | \$12  | \$10  | N/A  | \$200                                    |
| <b>Usability</b>                 | Simple  | Moderately complex                             | Simple  | Moderately complex                                    | Moderately complex                             | Modertely Complex                        |
| <b>Qualification Standards</b>   | Required  | Not required                                   | Not required  | Required  | Not required                                   | Not required                             |
| <b>Target Audience</b>           | Originally for expatriate coaching, and predeparture training, etc. | Education and business settings                | Any intercultural setting or cross cultural encounters      | Education, business, government, NGOs and non-profits | Education and business settings                | Business settings                        |
| <b>Time Requirements</b>         | ~15 min.  | ~20 min.                                       | ~15 min.  | ~30 min.  | ~20 min.                                       | ~15 min.                                 |
| <b>Delivery Method</b>           | Online or Paper & Pencil  | Online   | Online or Paper & Pencil                                    | Online  | Online   | Online or Paper & Pencil                 |
| <b>Languages Options</b>         | English only  | English only                                   | English, Chinese, French, German, Japanese, Spanish, Arabic | Currently available in 12 languages                   | English, Dutch, French, German, Italian        | English, Dutch, French, German, Japanese |
| <b>More Information?</b>         | Vangent   | Global Leadership Excellence, LLC              | Kozai Group, Inc.   | IDI, LLC  | Van der Maesen Personnel Management            | IBI (Intercultural Business Improvement) |
| <b>Dimensions Measured*</b>      |   |  |   |   |  |  |
|                                  | Flexibility/Openness  | Internal Readiness                             | Continuous Learning   | Denial  | Cultural Empathy                               | Intercultural Sensitivity                |
|                                  | Emotional Resilience  | <i>Self-Aware</i>                              | <i>Exploration</i>  | Defense   | Open-Mindedness                                | <i>Cultural Awareness</i>                |
|                                  | Perceptual Acuity   | <i>Willing to take risks</i>                   | <i>Self-Awareness</i>                                       | Minimization  | Social Initiative                              | <i>Attention to Signals</i>              |
|                                  | Personal Autonomy   | <i>Perceptive and respectful of diversity</i>  | Interpersonal Engagement                                    | Acceptance  | Emotional Stability                            | Intercultural Communicati                |

|  |                              |             |             |  |
|--|------------------------------|-------------|-------------|--|
| <i>Open minded</i>                       | <i>Global Mindset</i>        | Adaptation  | Flexibility | <i>Active Listening</i>                |
| External Readiness                       | <i>Relationship Interest</i> | Integration |             | <i>Adjusting Communication Style</i>   |
| <i>Globally Aware</i>                    | Hardiness                    |             |             | Building Commitment                    |
| <i>Knowledgeable about World History</i> | <i>Positive Regard</i>       |             |             | <i>Building Relationships</i>          |
| <i>Interculturally Competent</i>         | <i>Resilience</i>            |             |             | <i>Reconciling Stakeholder Needs</i>   |
| <i>Effective Across Cultures</i>         |                              |             |             | Managing Uncertainty                   |
|  |                              |             |             | <i>Openness to Cultural Complexity</i> |
|  |                              |             |             | <i>Exploring New Approaches</i>        |

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\*Sub-dimensions are italicized.

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Part III

Global Leadership Development

## Process Models of Global Leadership Development

Joyce S. Osland and Allan Bird

If we want to understand leadership, we need to look at our own experiences. I believe that we carry within us enough experience to form our own simple, coherent approach to being a good leader. Creating and clarifying our own leadership approaches will help us (one by one and in our own ways) truly make a difference.

—Margaret Wheatley

The next CEO of GE will not be like me. I spent my entire career in the U.S. The next head of General Electric will be somebody who spent time in Bombay, in Hong Kong, in Buenos Aires. We have to send our best and brightest overseas and make sure they have the training that will allow them to be the global leaders who will make GE flourish in the future.

—Jack Welch, former CEO of GE

Now that we have a better idea of what global leaders are like, the natural follow-on questions are “How did they get that way?” and “How can we develop prospective global leaders?” Carlos Ghosn, award-winning chairman, CEO, and president of Nissan, and Renault is one of the most famous global leaders in the business world. A look at his background shows that he was born in Brazil and educated in France. Ghosn worked in the United States for seven years as head of Michelin and spent three years with Renault in France before becoming president and CEO of Nissan. One of the few non-Japanese CEOs of Japanese companies, Ghosn is so popular that bento box lunches are named after him on some restaurant menus. He is given credit for Nissan’s leadership in the electric car market as well as Nissan’s successful turnaround effort and cross-border alliance with Renault.

Although cultural differences crippled other cross-border automotive alliances, such as Daimler-Chrysler, Ghosn sees them as opportunities. “When you have taken the time to understand [that people don’t think or act the same way] ... and when you are really motivated and mobilized by a very strong objective, then the cultural differences can become seeds for innovation as opposed to seeds for dissent” (Emerson, 2001: 6). He believes that in order to call yourself ‘international,’ “you have to go to countries that have a totally different way of thinking, a totally different way of organization, and a totally different way of life” (Emerson, 2001: 7). Ghosn had an international experience early in life when he studied abroad, has lived in four continents, and clearly appreciates cultural differences. In this respect, his background is similar to many other global leaders.

Kets de Vries and Florent-Treacy (2002) identify the foundation for developing global leadership in their research sample as:

family background that involved *intercultural experiences* (mixed-culture marriages, bilingual parents, exposure to other cultures);

*early education* involving international schools, summer camps, and travel;

*later education* that included exchange programs, languages, and international MBA programs; and

*spouse and children* who are supportive, adventurous, adaptable, and mobile.

However, this may also reflect the type of background that was typical in their research sample at INSEAD, a highly diverse graduate business school in France. Osland and her colleagues (Osland, Bird, Oddou, & Osland, 2007; Osland, Bird, & Oddou, 2012) found that not all of their expert global leaders had international backgrounds. They were, however, highly intelligent, quick learners who had been transformed by exposure to significant non-cultural differences at some point and, as a result, developed cognitive and social flexibility.

To complement the individual personal development that lays a foundation for global leadership development, organizations provide professional development in the form of training, transfer, teamwork, and travel. These same four development activities, especially transfer, were suggested as the most effective ways to develop global leadership in other research (Black et al., 1999). Transfer, more commonly referred to as international assignments, varies in terms of the type of development that is sought. Zaccaro, Wood, and Herman (2006) identify three types of experienced-based developmental job assignments. “Stamping-in” experiences involve work assignments where the individual is given tasks that require them to apply recently acquired skills or knowledge so as to reinforce and internalize what was previously learned. By contrast, action-learning assignments place managers in the position of working on real-time problems of importance to the company and requiring more than just applying learning. The final type identified by Zaccaro and associates are “stretch” assignments that move people out of their comfort zones and require them to approach the task differently—to work with challenging problems in unusual circumstances with significant uncertainty and risk. By and large, many international assignments are seen as fitting the latter type. Nevertheless, it is useful to recognize that all three types play a role in the developmental process. We will discuss the organizational role in development more directly in [Chapter 8](#). In this chapter, our focus is on how global leaders develop.

While the global leadership literature provides numerous recommendations concerning global leadership development, few of these recommendations are based on empirical research (for a review of the literature on global leader development, see Suutari, 2002). The exceptions included interviews with global managers and leaders asking for either recommendations or personal accounts concerning global leadership development (Black et al., 1999; Kets de Vries & Florent-Treacy, 2002; McCall & Hollenbeck, 2002) and the sole longitudinal study of global leaders (Graen & Hui, 1999). In a longitudinal study, the eventual career progress of Japanese global leaders (Graen & Hui, 1999: 17–18) was predicted by three behaviors that occurred in the first three years of their career: 1) building effective working relationships characterized by trust, respect, and obligation with immediate supervisors; 2) networking derived from their contacts at prestigious universities; 3) doing more than was expected in the face of difficult and ambiguous performance expectations. The last element, “difficult and ambiguous performance expectations,” is an example of the challenging experiences that constitute a common element in all models of global leadership development (Kets de Vries & Florent-Treacy, 2002; McCall & Hollenbeck, 2002; Osland et al., 2006). As Mary Catherine Bateson wrote in *Peripheral Visions: Learning along the Way*:

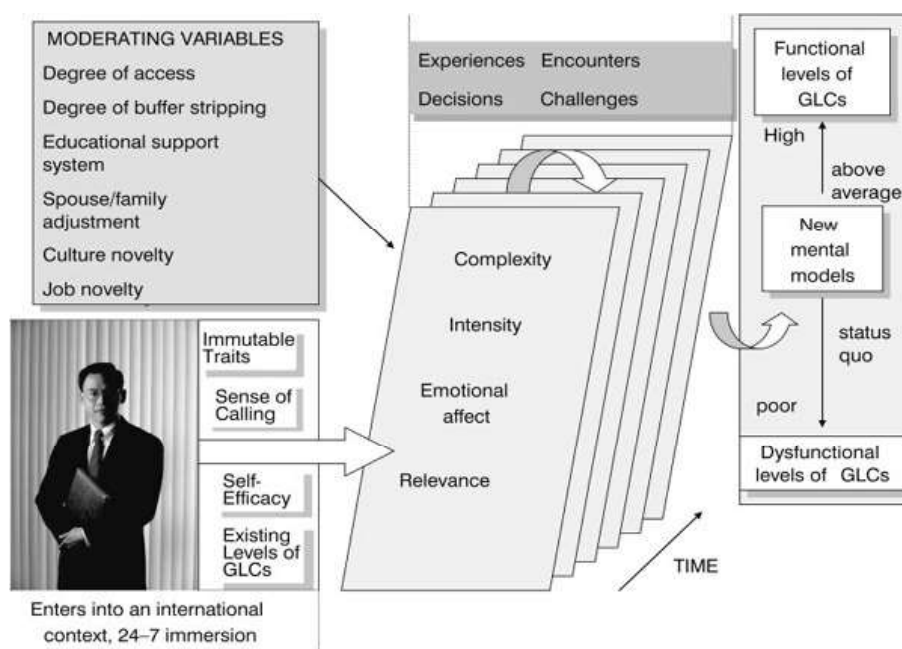
Insight, I believe, refers to that depth of understanding that comes by setting experiences, yours and mine, familiar and exotic, new and old, side-by-side, learning by letting them speak to one another.

We will look at four models of global leadership development in the following sections.

## The Chattanooga Model of Global Leadership Development

In 2001, a team of scholars spent two days at the Frierson Leadership Institute at the University of Tennessee, Chattanooga, reviewing their collective experience and wisdom as scholars and consultants in the area of global leadership. The team consisted of Allan Bird, Nakiye Boyacigiller, Paula Caligiuri, Mark Mendenhall, Edwin Miller, Joyce Osland, Günter Stahl, and Mary Ann Von Glinow. What emerged from that intensive effort was a framework for developing global leadership talent that came to be known as the Chattanooga Model. It was a process model of global leadership based on the assumption that global leadership development for an individual was a nonlinear, emergent process that is moderated by a variety of key variables, across time (see [Figure 6.1](#)).

To understand how the process works, let's begin in the lower left-hand corner of the model by focusing on the potential global leader. This model assumes that a manager enters a global/cross-cultural context, probably through an expatriate assignment, and is immersed in that environment over an extended period of time. Entering managers bring with them certain basic, core stable personality traits, including fairly immutable competencies (ambition, desire to lead, sociability, openness, agreeableness, emotional stability, etc.) and cognitive processes (attribution flexibility, cognitive complexity, tolerance for ambiguity, etc.). The degree to which managers perceive a sense of calling with respect to global work or perceive themselves as global citizens and view the assignment as something that fits "who they really are" can influence both their attitude toward the hardships they may encounter and whether they will be more likely to develop leadership capabilities as opposed to simply engaging in bureaucratic behaviors in the international assignment. Managers also enter this context with existing levels of self-efficacy that are brought to bear on various aspects of living and working globally. Finally, managers enter the global context armed with varying existing levels of global leadership competencies.



[Figure 6.1](#) The Chattanooga Model of Global Leadership Development

Thus, each manager enters the global context with a unique configuration of individual variables, bringing that configuration to bear upon the multitude of daily experiences he or she encounters in the new milieu. The

“folders” or “pages” in the center of [Figure 6.1](#) are representative of single experiences, interactions, and challenges the individual passes through over time. The recursive arrow in the model indicates that a current experience can cause, through its effect on memory, a revision or revisiting of past experiences. The development process is not based on a sequence of independent experiences; rather, each experience is tied to past experiences and constitutes a sense-making process of learning and acquiring global leadership capability. Bennis and Thomas (2002: 14) refer to this process as constituting “crucible” situations “characterized by the confluence of powerful intellectual, social, economic, or political forces” that severely test one’s patience, and one’s beliefs, and that produce a transformation in managers, leaving them deeply different relative to who they were prior to the crucible experience.

The specific nature of various global/cross-cultural crucible experiences is critical to the development of global leadership. The transformative potential of each experience can be understood in terms of four elements. Experiences with higher levels of each one possess greater transformational potential.

*Complexity* embodies the degree to which the experience involves situations or issues that are multilayered or multifaceted (i.e., can be understood in multiple ways or involve competing perspectives). For example, conducting a performance appraisal in an acquired language with a direct report in another country is more complex than conducting the same performance appraisal in one’s native language in one’s home country with an employee who shares one’s cultural background. In addition to mastering elements of multiple cultures, the necessity of conveying and receiving nuanced meaning accurately further increases complexity. More complex experiences have more transformative potential because there is a larger volume of information—different layers, multiple explanations—available for processing. Also, the processing of that information can be addressed from multiple perspectives.

*Affect* addresses the extent to which emotion is present or stimulated by the experience. For instance, overseas experiences and sophisticated simulations can elicit strong affect, such as frustration, stress, or the elation that comes from mastering a difficult challenge. More affective experiences have more transformative potential because experiences with a strong affective element are recalled more vividly and are available for recall over a longer duration. Hence they are more accessible for subsequent reflection. Also, as a trigger event, strong emotion may stimulate autonomic responses that, in themselves, have transformative potential.

*Intensity* involves the degree to which the experience requires concentrated attention or effort. For example, engaging in high-level international negotiations with a short deadline have a higher degree of intensity than fact-gathering. More intense situations compel more attention. More intense experiences have more transformative potential because the higher level of attention increases the prospect for absorbing more information, particularly more context-specific information. Higher levels of context-specific information provide increased probabilities for improved cue identification and subsequent explanation.

*Relevance* is the extent to which the experience is perceived as relevant to an objective or value important to the individual. More relevant experiences possess more transformative potential because they are likely to elicit higher levels of attention and information gathering, are more easily placed in an existing schema, and are more likely to elicit sensemaking behavior given greater motivation to learn and understand the experience. As with the other elements, more relevant experiences are more likely to be recalled for reflection purposes.

Relevance is distinct from the other three in that it is separable from the experience itself in a way that the other three are not. Objectives and values may change over time, leading to a reassessment of the significance or triviality of the experience or elements within the experience. For example, an interaction with someone may seem trivial in the moment and then afterward become significant when it is learned that the person is important, e.g., the president of a potential client company.

The transformational potency of experiences can be diluted or even cancelled out by a series of moderators that are found in the upper box on the left side of [Figure 6.1](#). In some cases, the experiences are buffered by organizational policies or by the individuals themselves; in others, the experiences are simply not novel or challenging enough to trigger transformation. Experiences are buffered when the degree of access to

transformative experiences is constrained by companies or the individual managers. For instance, if company policy is to provide expatriates with chauffeurs, translator/assistants, and housing in expatriate enclaves, their managers may live in a bubble that separates from the foreign culture and limits contact with its citizens. There are numerous examples of expatriates who socialize only with their compatriots and enroll their children in international schools, which buffers them from transformative experiences. The final two moderators relate to the degree of challenge in such experiences, which is couched here in terms of cultural novelty and job novelty. This assumes that a greater degree of novelty or difference will necessitate the adaptation and growth that develops global leaders. In sum, each of the variables in this section moderates the transformative role or strength of potential experiences and therefore either enhances or detracts from global leadership development.

The critical factor in the global leadership development of any manager is access to high-level challenges. Consistent access to the right sorts of challenges may produce, in some cases, solid global leadership competency development over time, which brings us to the outcomes on the right side of the model. Success, however, is not guaranteed, and access may also lead to failure. Managers may be given the right kind of experiences but find they are unable to handle them or learn from them because the challenges are overwhelming. Although the goal of challenging experiences is to help managers develop new mental leadership models, there is the possibility that the newly developed models are actually dysfunctional, reflecting a learning of the wrong lessons. For example, stereotypical thinking, misattributions, and inaccurate cause-and-effect links are frequent examples of learning the wrong lessons and developing inaccurate mental models. Though these mental models appear at the end of the process in [Figure 6.1](#), such models are being created over and over again, in response to each experience the individual has; thus, the developing framework is malleable, but with the potential to harden into a dysfunctional systemic framework if experiences are not handled effectively over time.

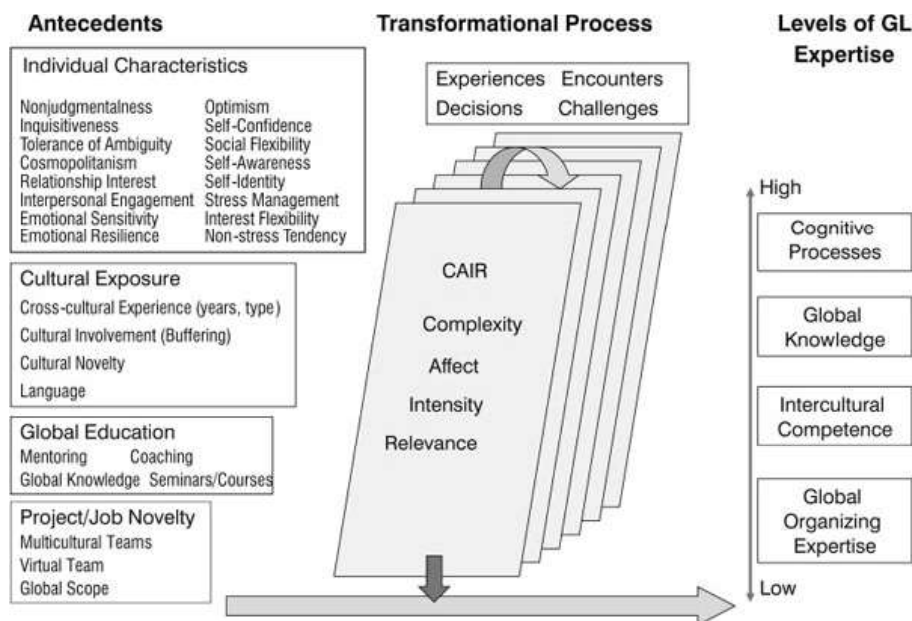
In summary, the Chattanooga model perceives the global leadership development process as emergent in nature and dynamic in process. If a manager's immutable personality traits, access to powerful challenges, etc., are consistent with what is required to work and learn in the global context, a functional global leadership process will ensue, and the manager will develop global leadership competencies. It is important to recognize, however, that other outcomes ranging from "status quo" to "dysfunctional" can result. At any point in time, a manager's developmental trajectory can rise or fall, moderated by the unique constellation of forces that impinge upon any given experience.

## The Global Leadership Expertise Development Model (GLED)

The GLED model expands upon the Chattanooga model but focuses primarily on the development of expertise in global leaders. The argument that global leadership development is a process of personal transformation is a recurrent theme. Presuming this thesis is cogent, it is likely that global leadership development is not a linear progression that simply adds to an existing portfolio of leadership competencies but rather a nonlinear process whereby deep-seated change in competencies, expertise, and worldview through experiential learning occur over time (Osland et al., 2006). As with the previous model, this one relies on transformative crucible experiences that test a person's mettle and beliefs. Traditional training cannot in and of itself be the primary tool through which GL expertise and competencies are inculcated within individuals. Organizations need to ensure that prospective global leaders are exposed to transformational experiences in their developmental process.

Based on the research literature and the presumption that GL development is an emergent phenomenon, we offer the following process model, referred to as the GLED model (see [Figure 6.2](#)) to illustrate GL expertise development. This model is an extension of the Chattanooga Model in [Figure 6.1](#).

The left side of the GLED model contains four categories of *antecedents*: individual characteristics, cultural exposure, global education, and project/job novelty. The individual characteristics category comprises the content domain of intercultural competence for global leaders (Bird, Mendenhall, Stevens, & Oddou, 2010). The other three categories also contain variables related to one or more aspects of GL development or expertise (Black et al., 1999; Caliguiri, 2004; Kets de Vries & Florent-Treacy, 2002; McCall & Hollenbeck, 2002; Yamazaki & Kayes, 2004).



[Figure 6.2 A Model of Global Leadership Expertise Development](#)

Four dependent variables—cognitive processes (expert decision making), global knowledge (facts related to the global environment and work domain), intercultural competence (ability to work effectively across cultures), and global organizing expertise (systems thinking and architecture necessary to create and maintain effective global organizations)—combine to determine the *level of GL expertise*. These categories are based on

Mendenhall and Osland's (2002) categorization of GL competencies. GL expertise is conceptualized as a continuum. Domestic leaders or novice global leaders may manifest some degree of GL expertise as a result of their work or experience with other nationalities. Similarly, not all global leaders will be fully expert. As Dreyfus and Dreyfus (1986) note, there are several stages in the developmental journey, from novice to expert. Higher measures of the antecedents are predicted to correlate with higher measures of GL expertise.

The relationship between the antecedents and outcome measures is mediated by the *transformational process*, which consists of experiences, interpersonal encounters, decisions, and challenges that relate to GL expertise. Not all cross-cultural experiences develop GL expertise, so transformational experiences differ from those found in the cultural exposure category. Furthermore, not all global or cultural experiences have the same impact (McCall & Hollenbeck, 2002; Osland et al., 2006). The transformational process, as in the Chattanooga Model, refers to a series of crucible experiences with varying degrees of complexity, emotional affect, intensity, and developmental relevance. Experiences with higher levels of each of these four elements possess greater transformational potential that, in turn, will result in developing a higher level of GL expertise.

Kohonen (2005) proposes an identity construction perspective in global leader development that is consistent with the Chattanooga and GLED models. She posits that the transformations described in these models represent occasions for professional and career identity construction. Coping and competency-development experiences associated with these international assignments give rise to a re-evaluation of one's identity. This may be particularly true with regard to global leader competencies such as global mindset.

A longitudinal examination of GL development would presumably reveal that dynamic individual characteristics increase as a result of transformational experiences and that current experience can cause, through memory, an updating or reliving of past experiences. Thus, GL development over time is more spiral-like and recursive than Table 5.2 suggests (Osland et al, 2006). The GL development process is not based on independent experiences; rather, each experience is tied to past, multiple experiences and constitutes a sense-making process of learning and acquiring global leadership expertise (Osland et al., 2006).

Both the Chattanooga model and the GLED model are conceptual in nature and have yet to be fully validated, though recent empirical work on several fronts points to their validity. For example, Caligiuri and Tarique (2011) found that personal predispositions of openness to experience and extraversion related positively to tolerance of ambiguity and cultural flexibility and negatively to ethnocentrism. Additionally, emotional stability was also related to lower levels of ethnocentrism. They also found that high-contact experiences, particularly those initiated by the organization, also facilitated development of competencies related to effective performance. In a similar vein, Pless, Maak and Stahl (2011), reported on findings from a study of company-sponsored participation in international service learning programs. They found that after going through the program, participants increased in the following domains, all of which are important for global leadership: responsible mindset, ethical literacy, cultural intelligence, global mindset, self-development, and community building. They reported that the processes that facilitated the heightening of these competencies were paradox confrontation and resolution, construction of a "new life-world," and emotional sense-making.

## A Model for Developing Global Executives

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The third model focuses on the interaction and partnership between the individual and the organization. It was developed by McCall and Hollenbeck (2002) on the basis of interviews with global executives (actual global leaders) who worked overseas. International assignments, which are viewed as the most powerful development tool in facilitating global leadership competencies (Gregersen et al., 1998; Hall, Zhu, & Yan, 2001; Mendenhall et al., 2001), received a great deal of attention in McCall & Hollenbeck's research and model.

Individuals cannot be forced to develop, and they themselves bear the ultimate responsibility for their development. Organizations, however, establish an organizational culture and policies that either enhance or impede development. Due to the experiences organizations provide, they can be the source of both intended and unintended lessons. Therefore, these authors recommend that organizations be both intentional and collaborative about development. Stated simply, this model is based on the idea that the company strategy determines what qualities are required in its leaders, and then talented people are hired and given appropriate experiences and support in order to develop those qualities.

One of their research questions involved testing whether a developmental model based on research on US executives (McCall, 1998) would also apply to an internationally diverse group of global executives. They found that the earlier model was relevant for global executives with only one adaptation—the addition of context to the experience component, which you can see in [Figure 6.3](#). Context, in this instance, usually relates to culture. Therefore, they concluded that “this basic process of development is the same for all executives, regardless of the countries they come from or whether the development is for global, expatriate, or local executive work” (McCall & Hollenbeck, 2002: 172). Although the basic components of the model are similar for all groups, the specifics of developing global executives do differ significantly—another example of a difference of both degree and kind. “Global executive development is much more complex and unpredictable and requires a greater focus, effort, and resources concentrated over a longer period” (McCall & Hollenbeck, 2002: 172). They justify their argument with these observations:

The global business strategy determines, to an even greater extent, the relevant lessons leaders need to learn.

A wider range of more difficult developmental experiences has to be available to develop a more talented cadre of executives.

Development takes place in a more complex, multicultural global environment with more diverse executives.

The mechanisms for development are more complicated, difficult to administer, and expensive.



Figure 6.3 A Model for Developing Global Executives

The McCall and Hollenbeck model is described below. The starting point chronologically is Business Strategy in the upper right corner.

### Business Strategy

An organization’s strategy and structure determine the number of international jobs, the types of global executives and their nationalities, and the skills they will need. If a firm opts to grow via acquisitions and alliances, they need executives with experience working across company borders. If the structure is organized along strict functional lines, it will be difficult to provide executives with the necessary cross-functional experience early in their career. The choice of geographic markets, for example, can determine how many executives of what cultural mix will be needed. The type of work leaders will be expected to do and where they will do it all depends on the business strategy. It informs the Experience and Context as well as The Right Stuff, described next.

### The Right Stuff

In this model, “the right stuff” refers to the end-state of development, what leaders have learned. It is determined by the business strategy and therefore varies by company. McCall and Hollenbeck (2002) believe that leaders are “made” (or born, then made) because most of what they need to master can be learned and is learned primarily from global experiences. The usual things that all executives have to know are made more difficult and subtle in a global context. Thus, there is a second category of lessons that relate specifically to the international nature of their jobs and are rooted in cultural differences and the unique demands of expatriation.

Table 6.1 lists the themes and lessons that were reported by McCall and Hollenbeck’s sample when they were asked to tell about at least three experiences that had shaped them as international executives and what they had learned from those experiences. The list is not necessarily exhaustive of lessons learned; nor are these lessons universal to all global executives. They do indicate the type of lessons learned from global experiences. The authors compared these findings to the lessons learned by a sample of US executives that was carried out in the 1980s. Many of the same lessons emerged from both samples, indicating that, on the surface at least, there is a common skill set shared by global and domestic executives.

The comparison, however, also surfaced significant differences in lessons learned. Cultural lessons composed 15 percent of the lessons learned by global executives; this category never emerged from the domestic executives. Furthermore, global executives reported more “big picture” lessons related to the Strategies for Doing Business category, while the US executives recounted more lessons related to the Learning to Lead and

Manage Others category. From this, McCall and Hollenbeck conclude that global executives have a broader perspective on the world, which is why it can be difficult for them to return to a narrower scope in a domestic job once they have worked abroad. Learning to listen carefully and the importance of the family in global work were more significant to global executives than to US executives. McCall and Hollenbeck (2002) argue further that even lessons that seem similar on the surface, such as learning to be flexible, are deeper and broader when learned in the more complex and uncertain global settings. For that reason, there is no substitute for actually working in another country (McCall & Hollenbeck, 2002: 180).

[Table 6.1 The Themes and Lessons of International Experience](#)

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**Learning to Deal with Cultural Issues and Different Cultures**

1. Learning to speak a foreign language
2. Learning about specific foreign cultures and contrasts between specific cultures
3. Learning generic lessons about living and working in foreign cultures

**Learning to Run a Business—Strategy, Structure, Processes; Global versus Local; Specialized Knowledge**

1. Learning strategies for doing business
2. Learning the specifics of running a business

**Learning to Lead and Manage Others—Selection, Development, Motivation, Team Building, Deselection**

1. Learning how to establish credibility
2. Learning to select the right people
3. Learning to build and sustain an effective team
4. Learning to make tough calls about people
5. Learning to stay focused—keeping it simple, setting clear goals
6. Learning to keep people motivated and committed, what to delegate and what not to delegate
7. Learning to develop people and the importance of developing people

**Learning to Deal with Problematic Relationships—Headquarters, Bosses, Unions, Government, Media, Politics**

1. Learning to handle immediate bosses and other superiors
2. Learning to manage the interface with headquarters and the larger organization
3. Learning to handle public appearances and the media
4. Learning to deal with governments and (external) politicians
5. Learning to deal with unions and other types of negotiations
6. Learning about internal politics

**Learning about the Personal Qualities Required of a Leader**

1. Learning to listen carefully, to ask questions, and to see the world through other people's eyes
2. Learning to be open, genuine, honest, fair; to treat other people with respect; and to trust others
3. Learning to be flexible, to adapt to changing situations, to take changing circumstances into account, to manage multiple priorities and complex relationships, and to think on your feet
4. Learning to assess risks and take them, and to act in the face of uncertainty
5. Learning to persevere, to act with discipline, and to stay calm under tough circumstances
6. Learning to be optimistic, to believe in oneself, to trust one's instincts, to take a stand for what one believes is right, and to accept responsibility for the consequences of one's actions

**Learning about Self and Career**

1. Learning about likes, dislikes, strengths, weaknesses, and preferences
  2. Learning what support you need from family or others, and how to manage the family under the pressure of foreign work
  3. Learning to manage your own career and development
-

## Experience

As in the previous two models, experience is found at the center of the model. The significant development experiences identified in McCall and Hollenbeck's work were categorized as foundation assignments (early work experience and first managerial responsibility), major line assignments (business turnarounds, start-ups, joint ventures, alliances, mergers or acquisitions), shorter-term experiences (significant other people, special projects, consulting roles, staff advisory jobs, developmental and educational experiences, negotiations, stint at headquarters), and perspective-changing experiences (culture shock, career shifts, confrontations with reality, changes in scope or scale, mistakes and errors in judgment, family and personal challenges, crises). Exposure to "significant other people" was reported by the largest number of participants (32 percent). These people might have provided either positive or negative lessons. "Especially in global work, opportunities to work in parallel with a predecessor, on-site learning (intentional or not) from a local national, and exposure to others with global careers had important influences and offered important learning opportunities" (McCall & Hollenbeck, 2002: 180).

The organization cannot control all of these experiences. Nor do intentionally designed experiences always result in developmental outcomes. However, individually tailoring experiences, thinking ahead about where individuals might need support, and tracking their progress provide a greater possibility that positive lessons will result. An international experience in the early years of one's career was strongly recommended by the participants. The selection of experiences, like "the right stuff," is ultimately determined by the strategy.

## Talent

As [Figure 6.3](#) shows, talent plus experience equal the right stuff. The organization is also responsible for managing talent and ensuring that they provide the right employees with experiences. There are several difficulties in assessing talent in a multicultural global organization: identifying a common standard across cultures, country differences in assessing, promoting and developing managers, wide variability in global executive jobs, and the organization's openness to promoting executives from other nationalities (McCall & Hollenbeck, 2002: 185–186). In order to benefit from the diversity, these factors should be considered:

Career histories have to be interpreted based on their cultural context.

Preexisting assets should be analyzed to assess where individuals stand now, where they could go, and which experience would contribute the most at this particular point.

Ability to learn from experience should be evaluated since this relates to taking advantage of the experience.

Potential for derailment should be analyzed. "Because the traps are more numerous and deadlier in the international context, it is imperative that organizations consider the possibility of derailment when assessing talent" (McCall & Hollenbeck, 2002: 187).

## Mechanisms

Talent management also requires appropriate Mechanisms, which refer to those policies and practices that aim at "getting the right people into the right experience." McCall and Hollenbeck (2002: 189) believe that organizations have to establish and maintain five parallel processes that serve both short-term business needs and development needs.

1. *Selection* refers to the organization's need to identify people who are ready to assume global positions. There has to be a system to identify and select these people when unexpected staffing needs arise.
2. *Succession* involves replacement plans with lists of potential successors in case an incumbent vacates a job unexpectedly. When this is done in advance, rather than in the midst of an emergency, more thought and care can be taken.

3. *Development* occurs by placing people in jobs that will expand their cultural or business skills, which is often done with people from a culturally diverse background who have a clear interest in international work.
4. *Discovery* mechanisms provide parochial employees with an opportunity early in their careers to ascertain whether they might have a previously unidentified interest in international work.
5. *Recovery* pertains to the organization's efforts to integrate repatriates when they return home from a global assignment.

### **Catalysts**

The last category of organizational supports are developmental Catalysts that help executives learn from their experiences. One category of catalysts *improve information*, such as interpreting feedback or providing feedback on development as well as on performance and outcomes. A second category *provides incentives and resources*, like holding people accountable for developmental goals or promoting people who model the desired developmental behaviors. A third category of catalysts *support change* by providing emotional support or viewing change in a systems context. "While perhaps an indirect catalyst, support for the whole family [of an executive on a global assignment] turns out to be important from a learning perspective" (McCall & Hollenbeck, 2002: 193).

This model's contribution lies in illustrating the strategic imperatives that drive executive development and the role played by the organization. They "globalized" a domestic model of development, and their international findings provide insight into some of the unique characteristics and challenges of developing global leaders. Given the qualitative nature of their research, future studies could generate hypotheses and test the model with quantitative measures. The work of Furuya and associates (Furuya et al., 2009) provides some support for the McCall and Hollenbeck model. They found that clarification of the alignment of international assignments with firm strategy and supportive HRM policies was associated with significant global leader competency acquisition and transfer.

## A Process Model for Global Leadership Competency Development

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Recently Mendenhall and his associates (2017) have sought to synthesize and extend the three previous models by drawing upon the work of Lewin (1947) and conceptualizing global leadership development as a process of remapping mental maps. In this regard, they build on the ideas on the work of Black and Gregersen (2000), who also applied the concept of remapping to global leadership development.

Mendenhall and associates (2017) begin by synthesizing prior process models. They organize prior work into a basic model consisting of antecedents, transformational processes, moderating variables, and outcomes. Antecedents include factors such as foreign language fluency, global knowledge, and current levels of global leader competencies. Antecedents are then influenced by moderating variables as they feed into transformational processes. Moderating variables include such things as job/role novelty, degree of challenge, and organizational support systems. Global leadership competency development takes place through a variety of transformational processes. Among these are processes of unfreezing/refreezing, undergoing crucible experiences, and a process of contrast/confrontation. The efficacy of various transformational processes in generating outcomes is also influenced by moderating variables. Ultimately, outcomes occur as a consequence of moderated transformational processes, including among other things changes in cognitive processes, changes in intercultural competence, and changes in the functionality of overall global leadership competence.

Working from this synthesized general framework, Mendenhall and associates (2017) propose a comprehensive process model and accompanying theoretical propositions. The model is presented in [Figure 6.4](#) and focuses specifically on the process of global leader competency development and the factors that influence that process. Key elements of the model are discussed below.

The development process begins with a trigger event, some experience or occasion that startles or disorients an individual, provoking him or her to reflect on a discrepancy between his or her perceived competency and his or her level of efficacy. Self-awareness may focus on a single competency or some collection of competencies or even address overall capability. Experiencing a trigger event alone may not be sufficient to stimulate development. Individuals may respond in one of several ways. They may, for example, upon reflection conclude that there was actually not a discrepancy but simply misfortune at work. Or they may conclude that significant adjustment is required and that competency development is called for.

Developmental readiness is the influential factor in determining how individuals respond to trigger events (i.e., to what extent the individual is ready to undertake effort to develop). They focus on two variables: ability and motivation. Aspects of self-awareness, cognitive complexity, and certain aspects of meta-cognitive ability are hypothesized to impact the extent to which an individual is ready and able to develop. Ability is not the sole determinant of readiness, however; motivation is also necessary. An individual's personal goals and interests, personal learning orientation, and self-efficacy determine his or her level of motivation to pursue competency development. Together ability and motivation influence an individual's self-commitment to develop.

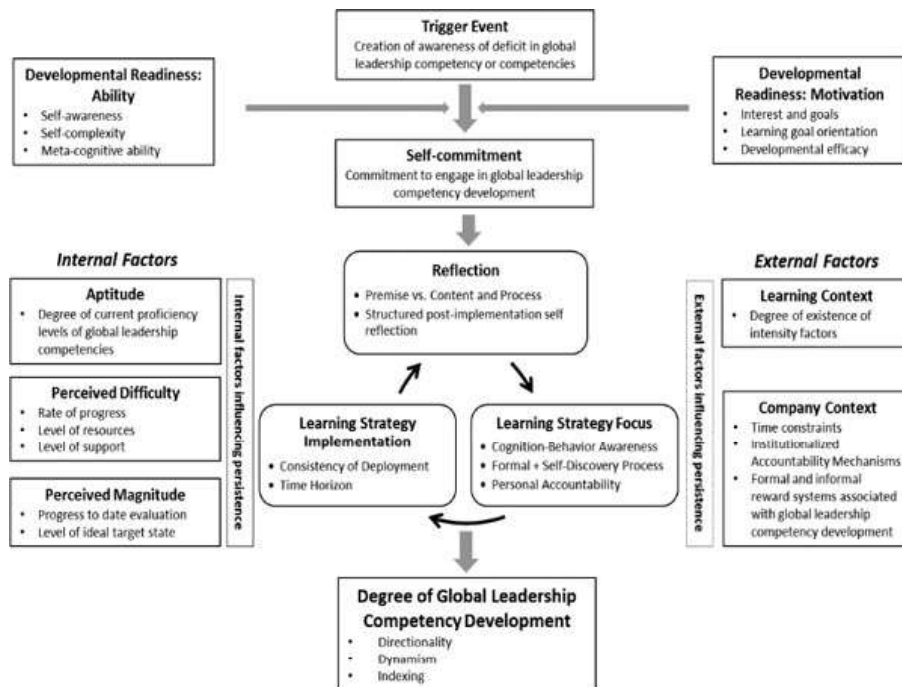


Figure 6.4 A Process Model of Global Leadership Competency Development

Self-commitment, in turn, leads to a developmental process that begins with reflection, which can be of three types. *Content* or *process reflections* refer to considerations of the content or process aspects of a “meaning scheme,” or way of viewing or understanding the world. Content focuses on the meaning attached to a scheme, whereas process focuses on the causal linkage in the scheme, the “if-then” connection. Process or content reflection often leads to straightforward transformation. For example, the act of exchanging business cards in the United States may carry a meaning of exchanging information and establishing a connection, and it may be carried out in a particular manner. Upon experiencing the exchange of business cards in Japan, one may expand the understanding of the “exchanging business cards” scheme to include additional elements of content and process common in Japan, such as acknowledging relative status differences or passing the card with both hands. Premise reflections refer to reconceptualizations of the scheme within a broader set of orientations. In the case of the business card exchange, for example, it may lead to a broader consideration of the role of such exchanges in interpersonal interactions, particularly with regard to ways of structuring social order. For Mendenhall and associates (2017), development of global leadership competencies is more consistent with premise reflection because it leads to “profound transformation.”

Competency development is most often achieved through experiential activities (e.g., on-the-job learning, “crucible experiences,” mentoring or coaching) and is most efficacious when these activities follow principles of cognitive-behavior theory in that they: enhance self-awareness of the relationship between cognition and behavior, are clearly structured, encourage discovery through action, and require that the individual take personal responsibility for managing the developmental process. This constitutes the second phase of the developmental cycle and is referred to as the “learning strategy focus” (Mendenhall et al., 2017).

The final phase of the developmental cycle is “learning strategy implementation,” and entails effective execution of learning strategy focus such that competency acquisition is achieved. Research demonstrates that competency development is achieved most effectively when repeated consistently over time—practice makes perfect. Reflection on the outcomes of learning strategy implementation completes one cycle and initiates a new developmental cycle.

Several factors internal to the individual influence the efficacy of the cycle as well as an individual’s willingness to persist in competency development. Higher degrees of aptitude for a working the cycle allow

individuals to leverage the cycle to greater advantage. Perceived difficulty, in contrast, may be associated with less willingness to persist or to obtain gains from the cycle. A third internal factor is perceived magnitude, referring to the perceived amount of developmental effort required. As individuals perceive the effort required to achieve a particular level of competency, they may either be motivated or demotivated to continue developmental effort.

External factors also influence an individual's commitment to maintaining developmental effort. A variety of conditions, falling under the heading *learning context*, may either contribute to or detract from an individual's ability and willingness to persist in the developmental cycle. These relate to specific experiential context in what the cycle is enacted, and may include such things as perceptions of powerlessness, cultural difference, degree of cultural immersion, and feelings of isolation. A second set of variables is labeled *company context* and involves such things as rewards/incentives for development, work-related time constraints, and accountability mechanisms.

The outcome of the complex interplay of the developmental cycle and internal and external factors is some degree of global leader competency development. While the amount of development is often the focus, the iterative and ongoing nature of the process points to the importance of attending to two other outcome elements—dynamism and directionality. Dynamism refers to the recognition that there is no steady state in competency development, but rather that competencies are always in a state of flux. Competencies are never “set,” but are fluid and may rise or ebb with each experience or turn through the cycle. Related to dynamism, directionality refers to the “trending” nature of development and the direction it is headed. Finally, they introduce the concept of indexing—as in an index of stock prices—to acknowledge that there is a constellational aspect to competency development. Some competencies may be in ascension while others wane.

Mendenhall and associates identify a set of 12 propositions that derive from the process model for global leader competency development and point the way to empirical investigations. They also point to linkages and parallels, including expert cognition (Osland et al., 2013) and responsible global leadership development (Miska, Stahl, & Mendenhall, 2013). Perhaps more significantly, they establish global leader competency development within the broader research stream of cognitive behavior theory, thereby simultaneously providing greater stability for future theory development while also opening up myriad new lines of inquiry.

## Lessons from the Global Leadership Development Models

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All four models presume that the demands of global leadership in a complex, ambiguous setting will require flexibility and adaptability. Thus, the ability to learn and learn continuously is critical. The development of this learning capability is best achieved through an experiential approach that emphasizes putting people into work situations that reflect the capabilities they need to develop (McCall, 2010). For example, intercultural flexibility is best developed by placing individuals in intercultural settings. In particular, the learning associated with challenging international assignments can result in personal transformation that, in turn, creates a better fit with global work requirements. Because it is “personal” and transformational, the development process for individuals is nonlinear, uncertain, and hard to predict.

We would be remiss not to point out that these models are presumed to be universally applicable (i.e., they describe the developmental process for global leaders regardless of nationality or culture). This is not, however, to suggest that the same experiences, or even the same type of experiences, will be similarly efficacious. Wilson and Yip (2010) find evidence suggesting Indian and Singaporean global leaders may derive very different learning than their US counterparts from identical experiences (Wilson, 2008; Yip & Wilson, 2008). The key insight, therefore, is that effective use of the model requires an individualized application. It is also essential that individuals and organizations clearly understand the purpose or end of development, which is business performance and not the enhancement of competencies (Hollenbeck & McCall, 2003).

More research is needed on process models of global leadership to determine whether the models presented in this chapter are adequate and borne out by empirical evidence. A systemic analysis of the factors that promote or impede global leadership development would verify if the models are comprehensive and avoid a Western bias, a concern that has been voiced by several scholars (Chin, Gu, & Tubbs, 2001). There is also a strong need for longitudinal research that compares and measures the impact of the transformational experiences at the center of these models. The influence of developmental readiness, emphasized by Mendenhall and associates (2017), is an invitation to explore motivational differences that may attach to development in a global, as opposed to primarily domestic/single-country, context. Moreover, organizational influences on development should receive greater attention. Firm-specific factors such as the alignment of strategy and HRM processes with the firm’s efforts to develop global leadership require particular attention.

The question of what companies have learned from their efforts to develop global leaders is taken up in [Chapter 8](#).