

# Global by Design, Local by Implementation: HR and HRIT in the 21st Century

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*"Vision without action is a daydream. Action without vision is a nightmare."*

*Unknown Japanese Philosopher*

## INTRODUCTION

Few would argue that we live in a global world. The fact is that globalization is here and here to stay. Yet, exactly what we mean by "global" varies widely depending on whom you are talking with and what you are talking about. Globalization can mean simply that a company has offices outside their home country and sells their products and services in other countries. There may be little communication or sharing across these offices, but the company is operating globally nonetheless. On the other hand, globalization can mean that a company offers one global service or product to the world, and each of the country offices serve as pipelines to the local market. And, of course, global can also mean anything along the continuum between these two extremes.

Likewise, few would argue against the assertion that the world is becoming ever more global. At the same time, there is a growing awareness of greater instability and uncertainty in the world than ever before. The current financial crises with subprime interest rates in the U.S., the political instability in the Middle East and Asia, the growing imbalances between the rich and poor, and global warming are some of the factors affecting our world and causing some retrenchment – some people might even say breakdown – in globalization.

Pankaj Ghemawat, global strategist, Harvard professor, speaker and author, says too many people are spouting off about the "flattening of the world," the "death of distance" and the "disappearance of differences" across countries. These rantings are what he calls "globaloney" – the illusion of a borderless, flat world and hence the tendency to overestimate the extent of and process of globalization.<sup>1</sup> The fact is most economic activity – including direct investment, tourism, and communication – happens locally, not internationally. In addition, the differences across countries and cultures are larger than many people realize. Ghemawat maintains that we live in a "semi-globalize" world – a world where some things are global and some things are not and where one-size-fits-all strategies don't stand a chance.

Companies must expect international differences and learn how to reconcile the discrepancies in a way that makes sense for them based on their corporate culture, business goals, and ever-evolving state of international development.

The issue is that globalization isn't easy – in fact, it's downright complicated. Cross-border integration, multiple languages, multi-cultural communication, diverse people, organizations, and business practices make understanding and managing the process of globalization a difficult task – difficult, but not insurmountable. To be successful we have to think about globalization as a process – a journey to a final destination of complete cross-border integration that we may never reach, or not reach within this century. So the question becomes how global should we be? What are the important areas of the HR function to make global and what areas should be left local or regional? How do we reconcile the seemingly paradoxical differences across countries and businesses? How do we find the right balance and prosper in a "semi-globalized" state?

In the words of management guru, Dee Hock, founder and chairman emeritus of Visa Corporation, the effective global organization in the 21st century must be "chaordic."<sup>2</sup> A chaord [cha + ord] (pronounced *kay' ord*), created from the words chaos and order, is a structure that thrives on the border between chaos and order: too much chaos leads to confusion, turmoil, and lack of clarity and shared purpose; too much order leads to hierarchical, inflexible, regimented organizations unable to learn and innovate. The chaordic organization is one that promotes global innovation, leveraging autonomous local capabilities and governed by guiding principles that direct individuals in completing their work.

The major tenet of this article is that we need to be "global by design" – meaning global at the core – and "local by implementation" – meaning local in our day-to-day operations. We need to assess the cultural, social, legislative, business, and economic differences between countries, synthesize the key differences, and design a global strategy that can be tailored and implemented locally. Figure 1 depicts the *Global Sphere Model* that we use as a framework for defining the approach companies should follow in crafting an effective global HR/HRIT strategy that will help them thrive in our semi-globalized world.

Figure 1. Global Sphere Model.



Source: Jeitosa 2008

There are five components to the Global Sphere Model: Strategy, Organization, People, Process, and Technology. At the core, Strategy, sets the overall direction for the company. The Organization component defines the various organizational models and service delivery structures that support the overall business strategy, e.g., centralized, decentralized, matrix, shared services. The People component identifies the individual competencies and resources required to carry out the strategy, e.g., business acumen, analytical skills, global mindset. The Process component outlines the business events, activities, and tasks to be supported in the global organization, e.g., recruiting, compensation, performance. Finally, the Technology component lays down the technical infrastructure to support the business strategy, e.g., Web Services, SOA, SaaS, ASP. Change Management and Project Management are two critical disciplines that encircle and support the five core components to ensure effective implementation and transition. This article discusses each of these components in turn and provides recommendations for building a comprehensive and cohesive global HR/HRIT strategy.

**CREATING A GLOBAL BUSINESS STRATEGY**

The first step in creating a global business strategy is to determine what globalization process the company will follow. Pankaj Ghemawat offers an approach he calls the AAA Triangle which focuses on strategies optimized for *adaptation* (adjusting to differences), *aggregation* (overcoming differences), and/or *arbitrage* (exploiting differences). The three A's represent three distinct types of global strategy that companies can pursue. *Adaptation* seeks to improve performance by maximizing the company's local presence. *Aggregation* is a way for companies to expand beyond their home country, delivering economies of scale by emphasizing regional and global operations; this involves standardizing product and service offerings and grouping together development and production processes. Finally, *Arbitrage* is the exploitation of differences between national and regional markets, often by shifting separate parts of the operations in different places, for example, call centers in India, manufacturing plants in China, and research and development offices in Poland. While, organizations may pursue a hybrid approach, combining some aspects of two different strategies – such as adaptation with payroll processing

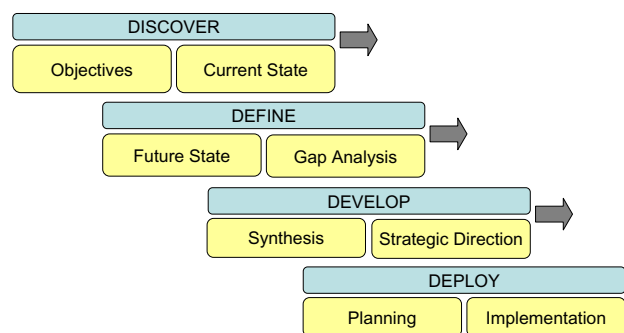
and aggregation with performance measurement – generally, one strategy is dominant and sets the overall approach.

In developing a global business strategy, the mantra that organizations must keep in mind is: “*think strategic, but act tactical.*”<sup>3</sup> Strategic choices require prioritization, so a tactical approach ensures that many, small, but critical and visible achievements are accomplished along the way, while continually working toward the ultimate goal. These small successes demonstrate to management and end users that things are progressing in a stepwise fashion according to the plan. Figure 2 depicts the four major stages and eight steps involved in developing a global strategic HR/HRIT plan.

In the initial stage of business planning, *DISCOVER*, the first step is to define the overall *Goals and Objectives* the HR/HRIT organization is trying to reach. Next, it is critical to first know where the organization currently is – *Current State* – in order to determine where it should go and how to get there. While it may not be necessary to spend months documenting each and every business activity to an excruciating level of detail, it is important to develop a solid understanding of the organization's strengths, weaknesses, opportunities, and threats (SWOT) in the current environment.

In the second stage, *DEFINE*, the desired *Future State* for the HR/HRIT organization is developed based on the overall corporate strategy and company culture. Thorough consideration should be given to industry benchmarks and best practices drawn from other similar and dissimilar organizations. The critical next step is to develop the *Gap Analysis* that identifies the deficiencies between the *Current State* and the *Future State*. It's important that this step be thorough to ensure all gaps are identified so that a sound deployment plan can be developed in stage four. Unidentified gaps and incomplete requirements are a major cause of project delays and miss-set expectations.

Figure 2. Global Strategic Planning Process



Source: Jeitosa 2008

In the third stage, *DEVELOP*, we conduct a *Synthesis* of the HR/HRIT situation – *Current State*, *Future State*, and *Gaps* – and develop the *Strategic Direction* based on the company's overall goals and its defined business strategy. The strategic direction consists of both general statements of direction, as well as specific objectives and initiatives to be carried out to achieve the goals. In the final stage, *DEPLOY*, the project plan is devel-

oped and the implementation is carried out based on the goals, initiatives, and priorities defined in the previous stages.

In building the deployment plan, it is important to take things down to the country and business unit level to ensure the development of a sufficient and adequate tactical plan. Careful planning should be made for the evitable bumps in the road that may derail the project. Finally, it is important to remain flexible to change the strategy as needed – strategies should be living and dynamic, able to flex as environmental and business conditions change. The sidebar – “Creating a Global Business Strategy” – highlights some particular points to keep in mind in creating a global business strategy.

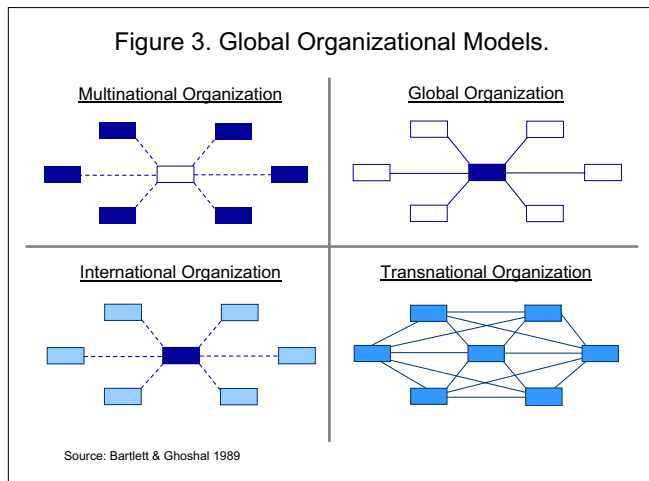
### Creating a Global Business Strategy “Think Strategic, Act Tactical”

- Plan for bumps and shocks in making strategic plans – prepare to take things down to the business unit and country level to make them relevant and real-world applicable.
- Be flexible to change your strategy as needed; strategies should be living dynamic approaches, able to flex as environmental and business conditions change.
- Envision multiple possible futures and develop scenarios for each, rather than trying to predict what the next bump or change will be.
- Recognize the importance of having options in an uncertain world (e.g., hybrid approaches, toe-holds as ways of exploring new markets, and alternative strategies based on successes and challenges encountered along the way).

### BUILDING A GLOBAL ORGANIZATION

Once the overall strategic direction has been defined, the next step in becoming *Global by Design* is to determine the structures that the organization will function within. In crafting the company’s global organizational model, the mantra to follow is: “think global, but act local.” It is important to understand first how the organization is positioned on the global stage, and then how it operates tactically in the local environment. Then you need to select the right structure based on the organization’s current stage of global development. Figure 3 depicts four models that are typically seen in global organizations.<sup>4</sup>

Figure 3. Global Organizational Models.



*Multinational* organizations focus on providing highly localized and individualized services with few needs by corporate headquarters beyond financial reporting. On the other hand, *Global* organizations provide a single, consistent, standard approach to business processes and service delivery, with little regard for the needs of individual, local business units. *International* organizations, while still highly centralized, attempt to leverage learnings across the organization and incorporate best practices from local operations into the global solution. *Transnational* organizations take a balanced approach, leveraging local knowledge and expertise, offering global solutions to achieve standards and economies of scale, and sharing learnings and best practices across the globe.

Figure 4. Global Shared Service Delivery Models.

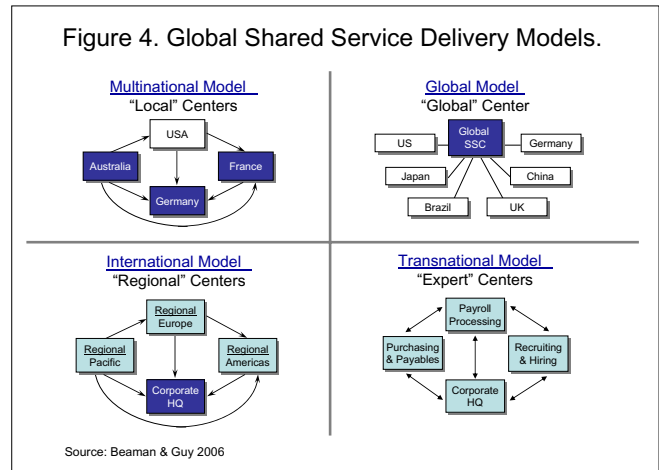


Figure 4 presents four different Shared Service delivery models that correspond to the four organizational models depicted in Figure 3. If the organization is largely *Multinational*, then local in-country shared service centers are most appropriate. Conversely, if the organizational is primarily *Global*, then a single global service center would be highly efficient and effective. For *International* companies, a regional shared service center approach may be the most effective allowing sharing and standardization across regions. And, for *Transnational* companies, Centers of Excellence (COE) or expertise-based service centers is most appropriate, where each center provides the resources and expertise that it is most highly qualified to offer.

It is important to stress that there are no pure models; most companies employ a variety of models as they globalize and mature – even simultaneously – depending on their stage of global development. It is also important to understand that there is no one best model and that it is not possible or even desirable to globalize or standardize or localize or share everything. Some standardization and integration is always good, but that does not imply that more is better. It is equally vital to know when not to standardize or integrate organizations. Integrated approaches are more complex and not particularly flexible. Matrix structures can also be difficult to manage and hold the right people accountable. The sidebar – “Building a Global Organization” – summarizes some of the key points to keep in mind when designing a global organizational model.

## Building a Global Organization “Think Global, Act Local”

- Understand that there is no one pure organizational model; most companies exhibit a combination of several different models based on their individual global development.
- Ensure that your choice of organizational model and global strategy fit with your company culture and overall goals, as well as with other initiatives your company has going on.
- Determine whether your strategy is one of aggregation, adaptation, or arbitrage – or some combination – and be prepared to change as your business needs evolve.
- Take a multi-dimensional approach to outsourcing, offshoring and shared services, seeking the most cost-effective service delivery approach based on evolving business needs.
- Know when not to standardize or integrate services/solutions.

### DEFINING GLOBAL BUSINESS PROCESSES

In defining your global business processes, the inverse of what’s required for the global organization model is important. With regard to business process, it is critical to first “think local,” and then “act global.” In thinking local first, you can be sure to thoroughly understand the local business environment, the local operating challenges, the local laws and legislation, as well as local customs and practices. Only then are you in the best position to “act global,” reconcile the differences, synthesize and create the best approach, and design an effective solution that simultaneously meets the needs of the local operating entities and of global headquarters.

An effective process taxonomy starts with first identifying your Global Business Functions, breaking those down into Global Business Processes, then Global Business Events, and finally to Global Activities, Sub-Activities and Steps. Of course, any number of levels and any names can be used to describe the levels, based on what works for your company. The following taxonomy can serve as a useful starting point for helping you define your global business processes:

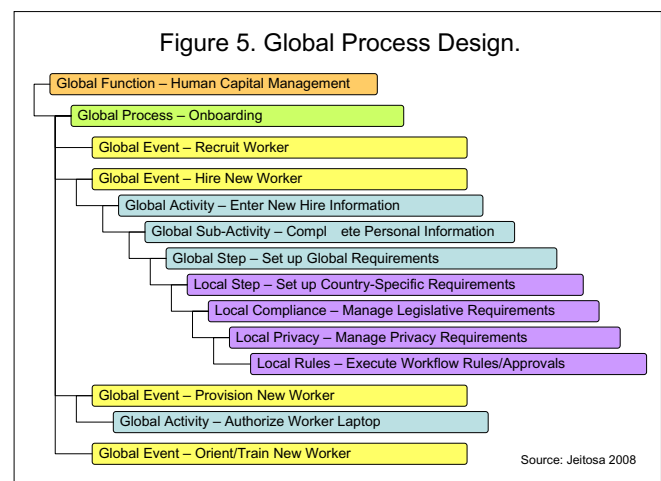
- **Global Business Functions** – Large business areas, such as Human Capital Management, Benefits Management, Payroll Administration, Financial Management that individuals (and vendors) logically group together.
- **Global Business Processes** – Groups of business practices that generally function together, resulting from some external business need, such as the Onboarding Process, the Merit Increase Process, and the Performance Assessment Process.
- **Global Business Events** – Logical groups of activities – historically, these were called transactions – that generally occur together, either sequentially or simultaneously, such as Recruit Worker, Hire Worker, Pay Worker, Provision Worker, Train Worker.
- **Global Activities, Sub-Activities and Steps** – Any number of activities and levels needed to fully describe a business event, such as enter new hire information, complete personal information, set up beneficiaries.

Once the global levels have been defined, the next levels

go into the local steps, tasks, and rules required for legislative, compliance, customary, or local country best practice reasons. The following can serve as a useful starting point for defining the activities, steps, compliance, and privacy requirements needed at the local level:

- **Local Steps** – Various actions that are typically performed within an individual business unit or country, such as Works Council negotiations, retirement planning in Germany (Alternteilzeit), recruiting and internship practices.
- **Local Compliance** – Critical activities that must be carried out in a given country for legislative or regulatory reasons, such as affirmative action reporting in the U.S., disability reporting in Germany, training reporting in France, population mix in Brazil, superannuation funding in Australia.
- **Local Privacy** – Adherence to regional and local country data privacy and protection directives to ensure that the individual data is protected and managed according to local country laws and practices, such as EU Data Privacy Directive, Canadian PIPEDA, and U.S. HIPAA legislation.
- **Local Rules** – Support for local customs and practices around data entry, work flow, approvals, notifications, such as who enters and approves merit increases, bonus payments, stock awards, and performance assessments.

Again, any number of levels and names can be used based on how detailed you choose to be in defining your business processes. Some companies will stop at the global level, leaving all the local business processes to be defined individually within each business unit/country. Others – in particular, vendors offering their products globally – take a more detailed approach, documenting business requirements down to each individual local rule and law that must be followed. Figure 5 shows a typical Global Business Process breakdown for the Onboarding Process. The sidebar – “Defining Global Business Processes” – describes some of the key points to keep in mind when doing global process design.

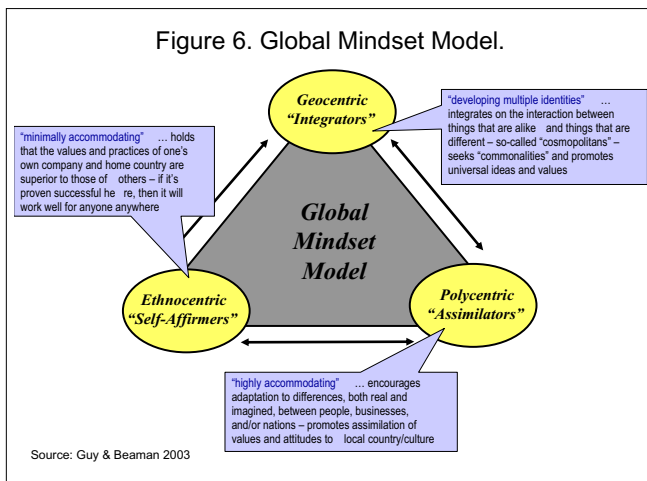


## Defining Global Business Processes “Think Local, Act Global”

- Seek first to understand local business needs, then reconcile the differences looking for commonalities across geographies and business units in order to define global processes.
- Decide on the number of levels and the names to be used to describe the levels, based on what works for your company.
- Determine which processes should be global, which should be regional, and which should be local.
- Start with the lowest level of local country legislative compliance and abstract to the highest global level.
- Focus on business events and orchestrating processes differently for different business units and geographies.
- Follow an approach of continual process improvement and optimization – it’s a journey, not a destination.

### DEVELOPING GLOBAL PEOPLE

The old adage, “it takes all kinds of people,” could never be truer in a global environment. Not only do we see personality differences, work/life choice differences, and multi-generational differences in the workforce, in working globally, we also must understand and accept broad and pervasive cultural differences that affect every aspect of our work. Global Mindset is a useful way to understand three broad approaches to how individuals perceive and react in a global environment. The Global Mindset Model, based on Daniel Sullivan’s (2001) three-way typology, characterizes three different mindsets – *Ethnocentric*, *Polycentric*, and *Geocentric* – that we typically see in the global environment (see Figures 6 and 7).



Each individual mindset is best suited for a different type of global assignment:

- *Ethnocentric* mindsets take the home country as the basis for beliefs and evaluations, holding that one’s own culture and values are intrinsically superior to those of others, to the point of even assuming national superiority. It might be characterized by the expression: “The sun never sets on the British empire.” This type of mindset is effective when there is a need to standardize operations around the world or to protect the company’s intellectual property, such as a global product vendor who needs to

ensure that the product is developed and functions the same everywhere around the world.

- *Polycentric* mindsets are ones that adapt well to cultural differences and are effective at bridging the gap between home and foreign culture and company objectives. The Polycentric mindset entails accommodation or assimilation with the foreign culture, sometimes even to the extent of “going native.” It might be characterized by the expression: “When in Rome, do as the Romans.” This type of mindset is appropriate when there is a need for intense focus on the local market or regulatory situation, such as payroll processing, which is highly dependent on local laws and practices.
- *Geocentric* mindsets are ones that seek universals and commonalities across cultures and are effective at tying diverse groups together toward a common goal. A Geocentric orientation implicitly assumes that a universal set of values govern human interaction, downplaying the significance of cultural differences. This mentality can best be summed up by the famous words of John Lennon, “Imagine all the people sharing all the world.” This type of mindset is appropriate for individuals who work in a global role, responsible for integrating the ideas and practices of different businesses, functions, and locales into a unified approach, such as HR and HRIT analysts who are responsible for global process design.

Figure 7. Three Types of Global Mindset.

ETHNOCENTRIC	POLYCENTRIC	GEOCENTRIC
<p><b>Benefits:</b></p> <ul style="list-style-type: none"> <li>• Safeguards proprietary technology and business design</li> <li>• Poses cognitive challenges, inspiring emulation</li> </ul> <p><b>Risks:</b></p> <ul style="list-style-type: none"> <li>• Tries to fit all situations into one and only way of doing things</li> <li>• Promotes “not-invented-here” syndrome</li> <li>• Inhibits adaptation and absorption of new ideas</li> </ul>	<p><b>Benefits:</b></p> <ul style="list-style-type: none"> <li>• Bridges differences by being an empathetic facilitator</li> <li>• Accelerates market entry, product adaptation, positioning</li> <li>• Attuned to various customers, markets, and institutions</li> </ul> <p><b>Risks:</b></p> <ul style="list-style-type: none"> <li>• Can have limited territorial scope</li> <li>• Champions “idealized” foreign markets / “going native”</li> <li>• Tendency to generalize small experiences to larger domain</li> </ul>	<p><b>Benefits:</b></p> <ul style="list-style-type: none"> <li>• Supports diversity and sensitivity to local practices</li> <li>• Thinks of individuals as part of the global community</li> <li>• Pushes managers to seek new ways of doing things</li> </ul> <p><b>Risks:</b></p> <ul style="list-style-type: none"> <li>• Knowing a little about a lot, but not much about anything</li> <li>• Difficult to develop and retain while preserving who you are</li> <li>• Can erode clarity and common purpose, lost in “hodge-podge”</li> </ul>

Source: Sullivan 2001

With respect to international work, a global mindset is directly related to the individual’s effectiveness depending on the nature of the job. For example, *Ethnocentric* individuals tend to excel in environments that call for significant standardization of methodology or technology, while *Polycentric* individuals thrive in situations that require considerable sensitivity to local conditions. *Geocentrics* excel in positions that require identifying commonalities and integrating different approaches. Hence, the role or job the individual is to perform is vital in determining the type of individual needed for a given assignment.

Bartlett and Ghoshal, in their seminal work on the different types of structures found in international business organizations, suggest that international success is dependent on the fit between the individual’s orientation and the type of organi-

zation they work for. They identify four different types of leaders that are required to successfully manage the different types of global organizations:

- *Business Managers* strategize globally, focusing on achieving global efficiencies, coordinating activities across borders, and allocating resources across the world in the best manner possible – the *Ethnocentrics*. They support a single set of uniform operational standards and oversee the efficient distribution of assets across the organization by coordinating activities and linking capabilities and resources across the globe. They serve as the global strategists, business architects, and coordinators, unifying cross-border interactions and protecting the corporation's global interests. They "have one overriding responsibility: to further the company's global-scale efficiency and competitiveness" (Bartlett and Ghoshal 1992).
- *Country Managers* build local resources to meet local customer needs, satisfy host government requirements, interpret local laws and regulations, and maintain market position in country – the *Polycentrics*. They are focused on the local market situation, ensuring that the organization is sensitive, flexible and responsive to local country needs, aware of and responding to local and external competitors and adhering to the demands and regulations of local governments. These managers must have a deep understanding of the local environment and be able to defend the interests of local operations. Sometimes, however, a country manager can be forced into carrying out a strategy that "directly conflicts with what he or she has lobbied for in vain" (Bartlett and Ghoshal 1992).
- *Functional Managers* specialize in specific functional areas, scanning for information worldwide within a functional domain, increasing global knowledge and sharing, cross-pollinating ideas, and championing innovations – the *Geocentrics*. They are the lynchpins that connect different areas of functional specialization across the globe. As champions of a given function or product, their primary role is one of finding commonalities across diverse business units, connecting resources and capabilities, and transforming piecemeal information into strategic intelligence. "Functional managers must scan for specialized information worldwide, 'cross-pollinate' leading-edge knowledge and best practice, and champion innovations that may offer transnational opportunities and applications" (Bartlett and Ghoshal 1992).
- *Corporate Managers*, generally based at headquarters, focus on finding, developing, and deploying talent across the globe to respond to demands of the transnational environment – also the *Geocentrics*. These are the company's top executives who manage this complex web of interactions across the global organization and identify and develop talent through effective succession planning, job rotation, on-the-job training, coaching, and the career development processes. "Corporate managers integrate many levels of responsibilities, playing perhaps the most vital role in transnational management" (Bartlett and Ghoshal 1992).

In today's modern, global organization, it is vital to maintain a balance among all four types of managers, using expatriate assignments and job rotation practices to ensure that individuals have the opportunity to act in multiple, different roles throughout their careers. Gone are the days where local country managers can set up their "fiefdoms" and control their operations as "warlords" to the detriment of the rest of the organization. Effective managers today need to develop multiple competencies, be able to perform in a variety of roles, and be capable of wearing many different hats.

Working in a *Transnational* organization typically requires an ability to balance multiple perspectives, manage complexity, and build commitment through a highly networked, widely dispersed global organization. While *Transnational* organizations need all four types of leaders, organizations at other stages of global development will generally have a stronger need for one type of manager over the others. Purely domestic companies need primarily *Ethnocentrics*, while multinational companies need more *Polycentrics*. *International* and *Transnational* organizations need all three types of managers, in particular the strong global corporate executives to manage the interactions between all the others.

In brief, to develop global people the mantra to keep in mind is: "think inclusive, act accountable." It is important to understand that the most successful teams are cross-functional, cross-divisional, and cross-cultural, because each person brings their own unique perspective and experience to the table – and, when combined, these unique approaches yield a more complete solution to the problem. The sidebar – "Developing Global People" – highlights some key points to remember in building inclusive and accountable global teams.

### Developing Global People "Think Inclusive, Act Accountable"

- Select global leaders with the right characteristics to be successful – Ethnocentric, Polycentric, Geocentric – matching individual personality traits and global mindset orientation with the goals of the position.
- Understand that there is no single best approach – select the right global mindset for the right job.
- Implement cross-cultural training seminars, exchange programs, and rotational assignments to broaden individual horizons
- Build global cross-functional, cross-divisional, cross-cultural teams for the most successful projects.
- Recognize the global diversity is an evolution; appreciation and acceptance doesn't happen overnight.

### DEPLOYING GLOBAL TECHNOLOGY

The final key component in our Global Sphere Model is technology – the infrastructure, systems, and tools that support the people and the processes in the organization in achieving the defined strategy. The albatross around the necks of today's chief information officers is the integration problem. The plethora of systems, the varying technologies and release levels, and the eternal upgrade treadmill have created endless challenges and are major source of sunken and unquantified costs for the IT organization. Inflexible

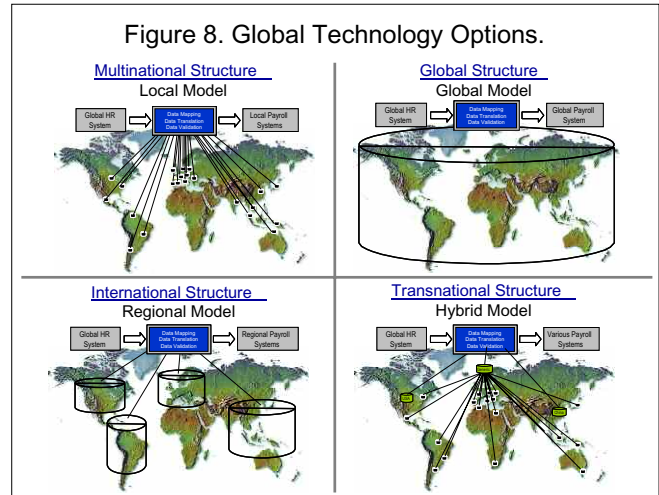
systems, incompatible applications, mounting “shelfware,” and excessive maintenance and upgrade costs have brought growing frustration with the enterprise resource planning (ERP) environment. The resultant challenges for HR and HRIT – dual data entry, inconsistent user experience, and overall lack of data integrity – are major reasons why the HR organization isn’t seen as strategic: most are too busy with day-to-day maintenance activities, holding their fingers in the dike!

Fortunately, ERP is experiencing a paradigm shift as fundamental as the movement 20 years ago when the industry shifted from mainframe to client/server. Collectively called Web Services and Service-Oriented Architecture, a new framework for enterprise applications is emerging on the market for the knowledge worker, the line manager, and the front-line employee, enabling people to do their jobs more effectively and more productively. This technological shift, along with the increasing ubiquity of the Internet and the maturing of Web technologies, are propelling our industry toward a cataclysmic change in how we deliver and employ HR applications. Modern enterprise applications in the 21st century must embrace the following 10 principles:

1. **Global** – As the globalization tsunami continues to swell, enterprise applications must provide data structures and business processes that are global at the core and local at the periphery to meet the needs of both corporate and local operating entities.
2. **Integration** – Enterprise applications must be integrated more easily and cost-effectively across the enterprise, assuring real-time access to accurate and essential information.
3. **Flexibility** – Systems must embrace change as a constant with more flexible and configurable business processes, enabling organizations to change as quickly as business needs change.
4. **Front Office** – Applications must move out of the back office and into the front office, supporting knowledge workers and the strategic HR partner with relevant information to guide them in their daily work.
5. **Extensibility** – Enterprise systems must be extensible, moving beyond traditional business processes and transcending company borders to unite processes across corporate boundaries.
6. **Reusability** – Systems must enhance information structures and consolidate development efforts to reduce redundancy, improve reusability, and eliminate reinventing the wheel.
7. **Collaboration** – Enterprise applications today must support horizontal, networked, and matrixed organizations, promoting teamwork and collaborative efforts across the global enterprise.
8. **Confidence** – Systems must build confidence with their constituents through partnership, commitment, and accountability, guaranteeing corporate responsibility, global regulatory compliance, and data privacy and protection.
9. **Forward-Looking** – Applications must take a forward-looking approach, providing leading indicators, predic-

tive modeling, and proactive metrics to guide managers and professionals in their daily work.

10. **Lower Cost** – Enterprise applications must lower the total cost of ownership by reducing costs for infrastructure, development, licensing, implementation, maintenance, support and upgrades.



**Figure 9. Global Technology Considerations.**

LOCAL APPROACH	REGIONAL APPROACH	GLOBAL APPROACH	HYBRID APPROACH
<p><b>Pros:</b></p> <ul style="list-style-type: none"> <li>Ability to phase in solutions by country and impact areas</li> <li>No need to convert local country systems</li> <li>Provides autonomy and flexibility at the country level</li> </ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"> <li>Requires each local system to build interfaces to HQ</li> <li>Challenges with timings and data integrity</li> </ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"> <li>Reduces the number of interfaces required</li> <li>Takes advantage of emerging regional providers</li> </ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"> <li>Requires conversion of local systems to regional providers</li> <li>Immaturity of HR/PR vendors in some regions</li> <li>Lack of functionality and limitations with some solutions</li> </ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"> <li>Requires no local interfaces</li> <li>Allows business to focus on more strategic areas</li> </ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"> <li>Requires conversion of local systems to global provider</li> <li>Loss of flexibility and responsive to local business needs</li> <li>All global providers have various limitations</li> </ul>	<p><b>Pros:</b></p> <ul style="list-style-type: none"> <li>Requires development of multiple interfaces</li> <li>Generic interface provides a standard format for each country</li> <li>Ability to phase in countries as resources and time permit</li> </ul> <p><b>Cons:</b></p> <ul style="list-style-type: none"> <li>May create double data entry in non-interface countries, creating data integrity problems</li> <li>Requires countries to establish their own feeds to the generic interface</li> </ul>

In brief, in deploying global technology the mantra to follow is: “think enterprise, act connected.” No matter what organizational model you are working within – *Multinational*, *Global*, *International*, or *Transnational* – it is important to think about providing an enterprise-wide technical architecture that integrates the multitude of systems that make up today’s modern enterprise. Figures 8 and 9 describe four models to consider in designing your global technology architecture and ensuring the right amount of connectedness across all entities in the global organization:

- **Local Model** – Embraces the company’s many local solutions by integrating them with the chosen global platform. To eliminate dual data entry and ensure data integrity, the global HR platform should “drive” the local payroll applications. This option provides the best fit for the *Multinational* organization, allowing for a phased approach in building toward a more global or transnational solution. However, it does create chal-

lenges with timing and managing a large number of system interfaces.

- *Global Model* – Provides one single system for the entire global organization, creating a solid foundation for the centralized *Global* organization. This solution is the best fit for large companies that provide a homogeneous solution to the market and that drive strong methods and procedures from the corporate center. It suffers from a lack of flexibility and responsiveness to local market conditions and hence can provide reduced functionality to the individual business units and geographies.
- *Regional Model* – Reduces the number of local interfaces required and leverages the emerging regional providers on the market. This option best serves the needs of the *International* organization, providing for a regionalized approach that can still be managed effectively by corporate headquarters. The downside to this approach is the relative immaturity of the market in providing functionally rich applications, as well as our lack of expertise in working with regional solutions.
- *Hybrid Model* – Is a blend of local, regional, and global solutions and is the best fit for the modern *Transnational* organization. This solution provides a practical approach that leverages the strengths and avoids many of the weaknesses of the other models. It supports a phased geographical approach, allowing business units and countries to evolve based on their level of maturity, sophistication and business need.

In our ever more mobile, global, virtual, digitized world, it is important to provide an infrastructure that connects individuals across the world. Technologies such as voice-over-internet-protocol (VOIP), social networking software (such as Facebook, MySpace, Linked-In), and new modes of communication (such as wikis, blogs, instant messaging, and RSS feeds) are becoming the standard way to work. We must also manage the convergence in the workplace of myriad, disparate technologies from telephones to computers to handheld devices. Free, open technologies allow organizations to easily operate across borders without having to build costly centralized infrastructures. Mashups – a lightweight method for integrating Web applications – provide a seamless user experience, allowing us to link and deliver services globally or locally, centralized or decentralized, depending on business needs. The sidebar – “Deploying Global Technology” – highlights some key points to keep in mind in thinking about the future of your global systems platform.

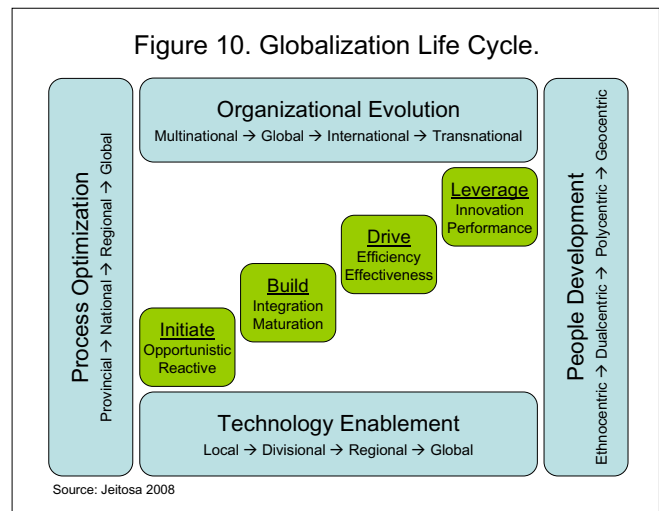
## Deploying Global Technology “Think Enterprise, Act Connected”

- Deploy an modern, global flexible, enterprise-wide architecture to support the world-wide organization
- Integrate applications to avoid costly, ineffective dual data entry, to improve data integrity, and to free HR non-value-added work, allowing them to focus on more strategic activities.
- Connect individuals globally through technologies such as voice-over-internet-protocol (VOIP), social networking software, wikis, blogs, and RSS feeds.
- Manage the convergence of myriad, disparate technologies from telephones to computers to handheld devices through free, open technologies and mashups.
- Deliver services globally, regionally or locally, centralized, decentralized or hybrid, depending on business needs.

### EVOLVING GLOBAL ORGANIZATION

In evaluating your current HR/HRIT situation along the four components of Organization, People, Process and Technology and in deciding where you ultimately want to be, it is important to first understand where you are on your globalization journey. All organizations change – like all “living” organisms – and proceed through a cycle from birth through growth to maturation. The Globalization Life Cycle consists of four stages – *Initiate*, *Build*, *Drive* and *Leverage* – that affect the four cornerstones of business: Organization, People, Process, and Technology (see Figure 10).

Figure 10. Globalization Life Cycle.



The *Initiate* stage of global evolution is generally opportunistic and reactive: the organization may have suddenly found itself to be global through a new business opportunity or a merger/acquisition that has thrust them unprepared onto the global stage. They must react quickly to meet the new demands that global business brings. Human Resources and HRIT are almost always an afterthought and are generally supported by developing interfaces from local systems to meet corporate reporting needs, such as financial and headcount reporting. This organization can be described as “multi-local,” comprising a constellation of different local systems interfaced (hopefully!) to the centralized corporate system – both

manual and automated – supported by numerous local, independent groups across the globe: in effect, the *Multinational Organization* (see Figure 3).

In the *Build* stage, the organization begins to streamline and integrate divergent processes and systems into a single, global centralized infrastructure. As the new-found global organization matures, it begins to integrate and consolidate multiple diverse systems into a common global strategy and platform. For HR and HRIT, this generally involves selection and implementation of ERP system such as Oracle/PeopleSoft, SAP or Workday. Depending on the size and culture of the organization, this integration may start at a divisional or regional level or at the overall corporate level. Reporting relationships shift from local county operations to a divisional or centralized structure, with goals, initiatives, systems, and processes being driven from the top-down: the *Global Organization*.

The third stage of the Globalization Life Cycle seeks to *Drive* efficiency and effectiveness throughout the organization. Alternative service delivery models are evaluated, and we see the emergence of shared services operations and further movement toward outsourcing to reduce costs and drive efficiencies. Effective HR and HRIT organizations seek to share learnings and best practices across local operations, driving best practices from corporate headquarters to local operations across the globe. Matrix reporting relationships are developed with the “solid” or direct line of reporting into corporate and the “dotted” or indirect line of reporting into local operations: the *International Organization*.

The final stage of the globalization process strives to *Leverage* the investments that have been made to promote innovation and enhance business performance. The innovative, high-performing organization is one that breaks down organizational barriers, supporting cross-functional teams and fostering global collaboration both within and beyond the organization. The HR and HRIT organizations during this stage of globalization are integrated through myriad, multi-dimensional reporting relationships crossing geographical operations, functional business units, external business partnerships, client relationships, and corporate headquarters management: the *Transnational Organization*.

Of course, these stages in the globalization process are not discrete steps; rather, globalization is an evolution along a continuum of ever expanding global capability. The process is often punctuated by bursts of activity that propel the organization along in its global development, followed by periods of equilibrium that allow time for integration and stability. This natural evolutionary development is stimulated by an intrinsic need to seek out best practices that can assist the organization in dealing effectively with the mounting complexity of the global business environment – survival of the fittest! It is important to keep in mind that “best practices” are relative and can only be understood, appreciated, and implemented in the appropriate setting: what may be good for one company at one point in its development may not be good for another company – or even for the same company at a different point in its development. It is also important to point out that organizations can skip interme-

diated stages in their development, jumping from one stage to another, in a “punctuated equilibrium” approach.

### MANAGING GLOBAL PROJECTS

Given the varying organizational models, the plethora of individual mindsets, variety of technological infrastructures, and the multiple stages in the globalization life cycle, the challenge becomes how to initiate and manage a global project. The fact is that few organizations consider themselves very effective at project management. The saying, “if you don’t know where you’re going, any road will take you there,” rings true of any initiative which lacks a project plan and structured methodology. Due to the lack of methodologies, tools, and techniques for organizations to effectively manage a global deployment effort, we see significant cost overruns and project delays.

Following a structured project management methodology with an experienced project manager is vital to ensuring the project’s success. While there are several different project management methodologies in the industry, the two most common are PMI (Project Management Institute) and PRINCE2 (PRojects IN a Controlled Environment).<sup>6</sup> Figure 11 describes the five basic steps and nine major disciplines involved in successfully managing a large deployment effort.

The five key process steps are:

- *Initiate* – Processes of formally defining and authorizing a new project or project phase, linking the project goals to the organization’s strategy and ongoing work via the project charter.
- *Plan* – Processes for defining and refining project objectives and planning the specific course of action required to attain the objectives and scope that the project is intended to address.
- *Execute* – Processes for managing the day-to-day work, integrating people management, following the project schedule, and effectively utilizing resources to carry out the project according to the plan.
- *Control* – The processes of regularly measuring and monitoring progress to identify variances from the plan so that corrective action can be taken when necessary to meet the project objectives.
- *Close* – Processes that formalize the acceptance of the project’s product or service and bring the project or project phase to an orderly outcome.

The nine standard project management disciplines are:

- *Integration Management* – Processes that ensure that all elements of the project are properly coordinated, such as developing the project charter and plan, preliminary scope statement and change control process.
- *Scope Management* – Processes that ensure that all and only the required work for the project is identified, planned and completed successfully, covering processes for scope definition, verification, and control.
- *Time Management* – Processes that manage the timely completion of the project, such as defining work activities, identifying resource requirements, developing estimates, and loading and leveling resource schedules.

- **Cost Management** – Processes that ensure that the project is completed within the approved budget, including the preparation of cost estimates, comparison of budget to actual, and management and correction of variances.
- **Quality Management** – Processes that ensure the project will satisfy the requirements and needs for which it was intended, including quality assurance processes, and verification, control and correction procedures.
- **Human Resource Management** – Processes that support efficient and effective use of the project team members, covering resource definition, acquisition, training, development, and performance management.
- **Communications Management** – Processes that manage timely, appropriate and effective communications to all interested parties on the status of the project, including the identification of stakeholders and the development of the communications plan.
- **Risk Management** – Processes that identify, analyze and respond to project risk, such as risk identification, qualification and quantification, including activities for planning, monitoring, mitigating and controlling project risk.
- **Contract Management** – Processes that ensure the successful management of contracted services from outside organizations, including vendor identification and management and contract administration.

triangle; if you try to do this, then one of the sides will give anyway, and it may not be in the direction you would have chosen. Thus, manage the Project Manager's Triangle actively, so there won't be any unplanned surprises down the road.

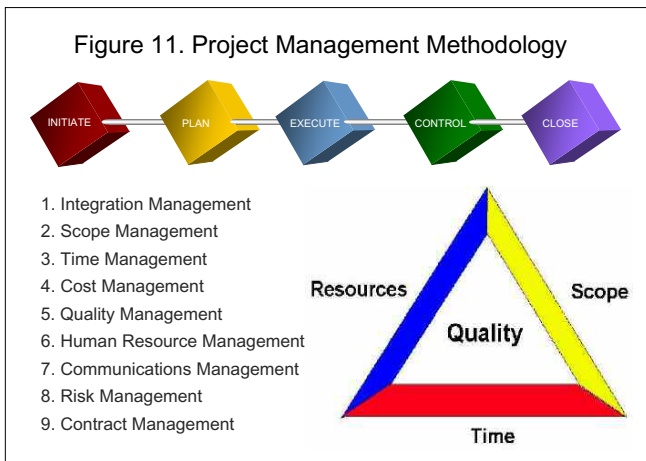
For successful project management, it is critical to keep the end-goal in mind, while managing activities daily on a task-by-task, resource-by-resource basis. Hence, the mantra for successfully managing any project is to "Think Goal-Oriented, Act Task-Driven." The sidebar – "Managing Global Projects" – highlights some key points to keep in mind when managing in a global deployment effort.

### Managing Global Projects

#### "Think Goal-Oriented, Act Task-Driven"

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- Adhere to the basic principles of project management and follow a tried-and-proven methodology to ensure success.
- Assign an experienced and skillful global project leader to manage the deployment effort.
- Ensure the development of a realistic project plan and manage the schedule based on available, not idealistic, resources.
- Involve resources experienced in both local and global issues and manage activities daily at the individual level.
- Follow the Project Manager's Triangle – scope, time, resources – and understand which of the two sides of the triangle are fixed and which is variable and manage it effectively.



The Project Manager's Triangle – Scope, Time, Resources – is a critical tool for understanding three key parameters that are within the project manager's control. The customer can fix one or two sides of this triangle, but not all three. For example, the deployment of a global solution for recruitment maybe define the project scope as implementation of résumé scanning and applicant tracking across 20 countries by June 1st. Thus, the dependent variable becomes the number of resources required to achieve that scope within that timeframe. If the number of resources is fixed, then one of the other sides of the triangle must vary, such as the completion date or the scope to be completed. If the resources and timeframe are fixed, then perhaps a phased scope, country-by-country can achieve the objective. The key point to keep in mind is that you cannot fix all three sides of the

### EFFECTING GLOBAL CHANGE

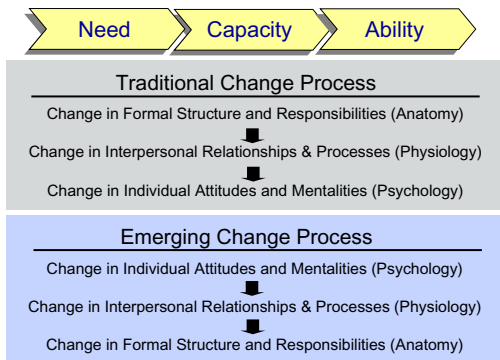
Change Management is the second pervasive process that encircles and supports the *Global Sphere Model*. As we know, change is inevitable and expected, and never more so than in today's global, digital, face-paced world. Yet change is hard, and so people resist. As Niccolo Machiavelli in *The Prince* says, "There is nothing more difficult to carry out, nor more doubtful of success, nor more dangerous to handle, than to initiate a new order of things. For the reformer has enemies in all those who profit by the old order and only lukewarm defenders in all those who would profit by the new order..."

And nothing will kill a new initiative faster than failure to facilitate an effective change management process. Bartlett and Ghoshal (1989) present a different approach to affecting change in an organization. Traditionally, companies have tried to implement a new initiative by changing the formal organizational structure: announcements are made, new processes are designed, and updated organization charts are printed and distributed. Then they sit back and wait to see the change in people's attitudes, behaviors and relationships. A more successful model for change is one that starts with fostering change in people's attitudes and mentalities first (cf. the "white space" according to Rummler and Brache, 1995); then, naturally, change in relationships and processes follows. It then becomes a purely administrative matter to change the formal structure and reporting relationships to match the new organization (see Figure 12).

An important component in facilitating change is to iden-

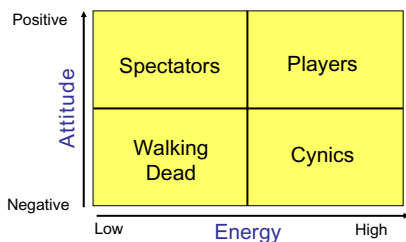
tify the individuals who are supporters and champions of the new initiative and those who are opponents and possible detractors to the effort. Don Tosti's *Energy Investment Model* (see Figure 13) provides a useful tool for identifying and assessing the attitudes and energy levels of individuals in organization. Those individuals with positive attitudes and high levels of energy are called *Players* – the “evangelists,” so to speak – those who can help “sell” the initiative throughout the rest of the organization. Players can be leveraged to go after the *Cynics* and *Spectators* and convert them. Those individuals with low levels of energy and poor attitudes – the *Walking Dead* – need to be either moved into more productive, better-fitting roles or transitioned completely out of the organization. Identifying where your supporters/players are and building individual strategies to bring the others along is a vital aspect of the change facilitation process.

Figure 12. The Emerging Change Process



Source: Bartlett and Ghoshal 1989

Figure 13. Energy-Investment Model



Source: Don Tosti

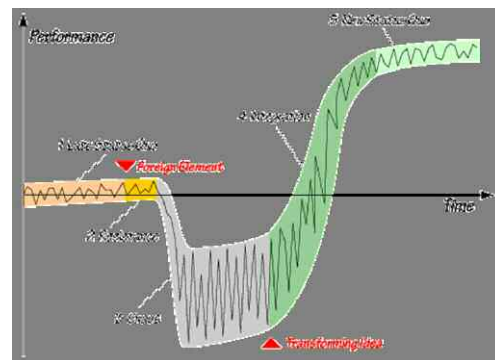
The well-known family psychologist, Virginia Satir (1991), provides a practical model for understanding the change process as it happens within individuals. Satir's model encompasses five stages that individuals go through as they experience and accept change (see Figure 14):

- *Status Quo* – This is the current environment before a change emerges. This steady state gives people a sense of security – they know what to expect and how to react.

Then a “foreign element” is introduced, impacting current business processes, disrupting people’s day-to-day lives, and threatening existing power structures and relationships.

- *Resistance* – When first presented with a change, most people will, at first, deny its existence and actively resist the new idea/process/element, trying to protect the status quo. In this initial phase, people generally do not understand the change nor admit the need for the change, so there is generally considerable active and loud resistance to the proposed new effort.
- *Chaos* – There is always a period when chaos reigns as people begin to explore the change and try to make sense of the new idea/process. For awhile, performance plummets as the people seek to integrate the change into their day-to-day lives. Finally, people begin to understand “what’s-in-it-for-them” and so start to let go of the old ways and explore new ways.
- *Integration* – Finally, a “transforming idea” emerges that shows individuals the way to integrate the change into their lives and take advantage of the opportunity it presents. At this stage, people begin to take ownership for the change and become committed to carrying out the new mission. Here the strongest resisters can be become the most fervent evangelists!
- *New Status Quo* – Once the idea has been fully integrated, people enter a new status quo. Because they have been successful at integrating the change into their environment, this new state is generally at a significantly higher level of performance than the previous state, and the cycle begins again.

Figure 14. Satir Change Model.



Source: Virginia Satir 1991

It’s important to note that all people go through these same steps when confronted with change. Although some may move faster through the cycle than others, it is not possible to skip steps along the way. The challenge for HR leaders is to minimize the depth of the performance dive and to speed the integration of the change throughout the organization by working with individuals to help them develop the skills needed to be successful in the new environment. Remember the words of this Chinese proverb: “Tell

me and I'll forget; show me and I may remember; involve me and I'll understand." The mantra to operate by in managing global change is "Think Holistic, Act Individualistic." This means you need to develop a comprehensive change management program that must be managed at the personal level, individual by individual. The sidebar – "Effecting Global Change" – provides some guidelines to help with change process.

### Effecting Global Change "Think Holistic, Act Individualistic"

- Foster change in people's attitudes and mentalities first, then focus on change in relationships and processes, followed by changes in the formal structure and reporting relationships.
- Identify both supporters and champions of the new initiative as well as opponents and possible detractors to the effort and manage their efforts appropriately.
- Accept that all people go through the same steps when confronted with change – some faster, some slower – and it is not possible to skip steps along the way.
- Build a safe environment that enables people to focus on their feelings, acknowledge their fears, and use their support systems.
- Help management avoid attempts to short circuit the change management process with "head-in-sand" approaches.

### CONCLUSION

The ability to understand, preserve, and leverage the past, i.e., the cultural heritage of the company, in order to design, build, and prepare for the future, i.e., the new Transnational organization, is key to finding the right structure and gaining wide-reaching acceptance throughout the organization. The title of this article, "Global By Design, Local By Implementation," is the overarching premise to keep in mind in working in a global environment. Global development does not entail a choice between globalizing everything versus succumbing to the complexities of the local environment. Effective globalization strategies strike the right balance between global, regional, local and provincial, and seek the silver thread that unites disparate groups toward a common goal. The sidebar – "Global by Design, Local by Implementation" – summarizes the key approaches of the seven components of the Global Sphere Model. Remember, no such change can happen over night – organizational evolution is a journey that must be nurtured and managed over time through the establishment of a clear vision for the organization, definition of clear processes and accountabilities, transformation of the mindsets of the people, and implementation of global, modern enabling technologies.

## Global By Design, Local By Implementation Key Components and Approaches

- Strategy Creation: "Think Strategic, Act Tactical"
- Organization Design: "Think Global, Act Local"
- Process Definition: "Think Local, Act Global"
- People Development: "Think Inclusive, Act Accountable"
- Technology Deployment: "Think Enterprise, Act Connected"
- Project Management: "Think Goal-Oriented, Act Task-Driven"
- Change Management: "Think Holistic, Act Individualistic"

### ENDNOTES

**1** "Globalization Myths versus Reality." Posted by Pankaj Ghemawat on September 5, 2007 4:44 PM. Harvard Business Online. [http://discussionleader.hbsp.com/ghemawat/2007/09/globalization\\_myths\\_versus\\_rea\\_1.html](http://discussionleader.hbsp.com/ghemawat/2007/09/globalization_myths_versus_rea_1.html)

**2** Hock, Dee, *Birth of the Chaordic Age*, San Francisco: Berrett-Koehler, 1999.

**3** I am grateful to Bill Campbell, founder of AG Consulting, for giving me this advice almost 20 years ago. It has served me well over the years – in multiple walks of life.

**4** Bartlett, Christopher and Sumantra Ghoshal, *Managing Across Borders: The Transnational Solution*, Harvard Business School Press, 1989.

**5** See Project Management Institute (PMI), [www.pmi.org](http://www.pmi.org).

**6** For PRINCE2, see the UK Office of Government Commerce (OGC), [www.ogc.gov.uk/methods\\_prince\\_2.asp](http://www.ogc.gov.uk/methods_prince_2.asp).

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## BIOGRAPHY

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Beaman is an internationally recognized speaker and author and has published works on such topics as global human resources issues, information technology, transnational organizational design, strategic sourcing, sociolinguistic variation, cultural diversity, and global leadership. Her first edited volume, *Boundaryless HR: Human Capital Management in the Global Economy* (2002), addresses global strategic planning and implementation issues and her second, *Out of Site: An Inside Look at HR Outsourcing* (2004) takes an in-depth look at human resource outsourcing. Her third book, *Common Cause: Global Shared Services for Human Resources* (2006), looks at the planning, implementation, measurement, and ongoing management of shared services for HR operations. Her newest book, *HR Frontiers: Shifting Borders and Changing Boundaries* (targeted for release in 2008) takes a broad look at the field of global human resource information technology from strategic planning to people management, from implementation and operations to measurement, compliance and governance.

She has a B.A. from Old Dominion and an M.S. from Georgetown University and was promoted with distinction to Ph.D. candidate in Sociolinguistics and Historical and Computational Linguistics. Her Ph.D. thesis conducted a quantitative analysis of sociolinguistic variation in Schwäbisch, a dialect spoken in southern Germany. She is the co-founder and editor-in-chief of the *IHRIM Journal*, program chair for IHRIM's Global Forum Summit, past-chair of the *IHRIM.link Magazine* Editorial Committee, and a former member of the IHRIM Board of Directors. In 2002, Karen received the Summit Award, IHRIM's highest award honoring her lifetime achievements in the field. She is fluent in English, German, and French, and has a working knowledge of Spanish and Portuguese. She can be reached at [karen.beaman@jeitosa.com](mailto:karen.beaman@jeitosa.com).