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## ***The New Transnational HR Model: Building a Chaordic Organization***

*By Karen V. Beaman*

### **ABSTRACT:**

In the age of increased global mobility, falling trade barriers, and explosive growth in international business, global expansion is on the agenda of most large enterprises. The question on every global company's mind is (or should be) how can they best organize themselves for international operations. Can you do business around the world the same way you do business around the corner, or are substantially different organizational and management approaches required to meet the challenges of global business? How do you build a "chaordic" organization that is adaptive to changing conditions, controlling at the center while empowering at the periphery, leveraging worldwide learning capabilities, and that transcends geographic and divisional borders? If the company as a whole faces such questions, the HR organization needs to anticipate emergent human capital needs in order to meet the challenges created by the company's globalization goals. This article presents a model for building a world-class *Transnational* organization, exploring in detail three critical components: strategic visioning, organizational development, and people orientation – or "global mindset". While globalization is clearly a multi-faceted issue, three critical success factors are the establishment of a shared vision and common set of guiding principles, the alignment of the company's organization model with their overall strategic objectives, and the development globally alert leaders who have the ability to identify and leverage opportunities for competitive advantage.

# ***The New Transnational HR Model: Building a Chaordic Organization<sup>1</sup>***

*By Karen V. Beaman*

## **INTRODUCTION**

*"[The] most abundant, the least expensive, the most underutilized and constantly abused capacity in the world is human ingenuity. The source of that abuse is mechanistic, industrial-age organizations and the management practices they spawn."*

*Dee Hock, Founder/Chairman Emeritus, VISA*

In the age of increased global mobility, falling trade barriers, and explosive growth in international business, global expansion is on the agenda of most large enterprises. The question on every global company's mind is (or should be) how can they best organize themselves for international operations. Can you do business around the world the same way you do business around the corner, or are substantially different organizational and management approaches required to meet the challenges of global business? How do we avoid the trap Dee Hock speaks of above and build a "chaordic"<sup>2</sup> organization that is adaptive to changing conditions, controlling at the center while empowering at the periphery, leveraging worldwide learning capabilities, and that transcends geographic and divisional borders? If the company as a whole faces such questions, the HR<sup>3</sup> organization needs to anticipate emergent human capital needs in order to meet the challenges created by the company's globalization goals.

The trillion-dollar question becomes how to implement a global HR business model that is, in the words of Dee Hock, "chaordic" – an organization that thrives on the border between "chaos" and "order" – "chaordic." The fundamental paradox that faces most enterprises is how to be simultaneously controlled from the center, responsive locally, and innovative enough to take advantage of new opportunities, while at the same time preserve a common vision, be adaptive to changing conditions, and coordinate activities globally. The global organization of the future must be able to foster both competition and cooperation simultaneously. The goal is to find the right balance between extreme autonomy and competition – which leads to lack of coordination and turf wars – and excessive authoritarianism and micromanagement – which stifles creativity and leads to futile bureaucracy (Hock 1999). One structure that supports many of Hock's chaordic principles is Bartlett and Ghoshal's (1989) "*Transnational*" model – an organizational model that seeks to achieve optimal balance between centralized control and decentralized autonomy, while maximally leveraging innovation and knowledge sharing across the enterprise.

Borrowing from Hock's chaordic principles, this article presents a model for building a world-class *Transnational* HR/Payroll organization, exploring in detail three critical components: strategic visioning,

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<sup>1</sup> Several of the models presented in this article have been developed in collaboration with Dr. Gregory Guy of New York University, to whom I am indebted for lending his analytical abilities, editorial attention, and collegial advice to my efforts. I would also like to acknowledge Charles Fay, Row Henson, Bob Stambaugh, and Al Walker for their partnership and inspiration over the years in helping to craft many of the ideas in this paper. Likewise, I am appreciative of the support of ADP and their 500,000 clients who have made much of this work possible. Of course, any deficiencies or inaccuracies are entirely my own and should not be attributed to any other individual or organization.

<sup>2</sup> Dee Hock, Founder and Chairman Emeritus of Visa Corporation, coined the word "chaordic" from "chaos" and "order." Based on the concepts of chaos theory, the chaordic organization is one that thrives on the edge of chaos: 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.

<sup>3</sup> In this article, use of the term "HR" comprises all areas of human resources, human capital management, benefits management, and payroll processing.

organizational development, and people orientation – or “global mindset”. Developing a shared global vision for the organization and aligning the organization’s strategic objectives with that vision is clearly the first step. The company’s vision of the future, as well as its business culture and administrative heritage, then determine how best to move the enterprise closer to the chaordic, *Transnational* model. Finally, and probably the most critical, component of any business model is the people who make up the organization: their alertness, agility, motivation, and global orientation – in essence, their “mindset” – that allows them to see, interpret, function, and act chaordically with a culturally relative perspective, identifying and leveraging opportunities for competitive advantage. After defining the new chaordic, *Transnational* HR model, this article also offers some guidelines on how to facilitate change within the organization and build chaordic, *Transnational* competency across the enterprise.

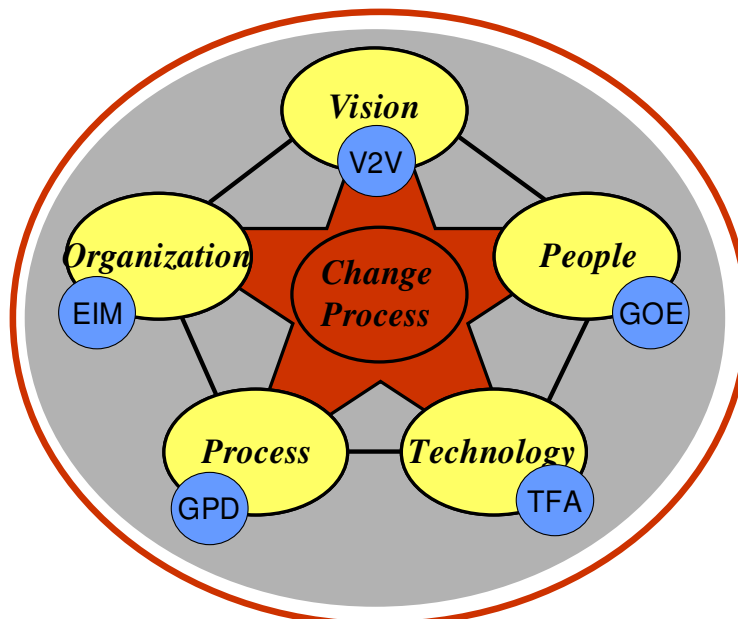
While globalization is clearly a multi-faceted issue, to be successful in today’s ever-increasing competitive environment, it is essential that international organizations become masters of the paradox – “enabling,” rather than “stifling” – developing a common sense of purpose and a cohesive set of principles by which to govern and to help reconcile apparent paradoxical demands. While many organizations may not yet be prepared to evolve into true “chaords” (in Hock’s purest definition of the word), all organizations can benefit by adapting Hock’s chaordic concepts and integrating what aspects may be appropriate into their business. To bring the organic benefits of a chaordic entity to the enterprise, there are three critical success factors: the creation a strong and intensely shared vision including the development of a trusting, empowering, self-organizing culture, the alignment of the company’s organizational model with their corporate history and overall strategic objectives, and the development globally alert leaders who have the ability to identify and leverage opportunities for competitive advantage.

## TRANSNATIONAL HR MODEL

*"All organizations are merely conceptual embodiments of a very old, very basic idea -- the idea of community. They can be no more or less than the sum of the beliefs of the people drawn to them; of their character, judgments, acts, and effort" (Dee Hock).*

While organizations are clearly a product of their leaders’ vision, beliefs, and values, they are also heavily influenced by their cultural origin and administrative heritage – or corporate history – as well as by the attitudes and orientations of the people who populate them. The new chaordic, *Transnational* HR business model brings together this corporate heritage, along with the vision and values of the enterprise, the organization’s structure, and the global orientation of its associates. Together with a foundation of well-defined, structured business processes and the appropriate supporting technology, the emerging chaordic, *Transnational* HR Model comprises the following five core components (see Figure 1):

Figure 1. Transnational HR Model



- ❑ *Vision* – sets the overarching framework, direction, and values for the organization
- ❑ *Organization* – defines the organizational structure that the enterprise will function within
- ❑ *People* – comprises the organization’s associates – their skills, competencies, and orientations
- ❑ *Process* – delineates the processes that individuals in the organization are to follow
- ❑ *Technology* – provides the underlying infrastructure to support the people and the processes

The new *Transnational* HR model must be adaptive and responsive to changing conditions and must at the same time preserve overall cohesion and unity of purpose. The fundamental paradox facing most enterprises today is that healthy, vibrant organizations naturally exhibit a dynamic tension between chaos and order: the chaotic organization must foster as much initiative and competition as possible – chaos – while building in mechanisms for cooperation and control – order. "Neither competition nor cooperation can rise to its highest potential unless both are seamlessly blended.... Either without the other swiftly becomes dangerous and destructive" (Hock 1991).

To ensure that the new HR business model is a living, breathing process, actively used in the day-to-day operations of the business, there must be a way to measure the organization’s progress according to the model – because, in the well-known words of Peter Drucker, “you can’t manage what you don’t measure.” Thus, the new *Transnational* HR Model includes methods for measuring each of its components:

- ❑ The *Vision-to-Values (V2V)* assessment process aids in defining a global vision and set of values for the organization, placing quantifiable, measurable values – or metrics – on the global enterprise vision and strategic objectives;
- ❑ The *Efficiency Innovation Model (EIM)* assesses where the enterprise is along the path in its global evolution and points to some leading practices to help move the organization further along in its development; and,
- ❑ The *Global Orientation Evaluation (GOE)* approach assesses the associates in the organization to determine whether they have the appropriate personality characteristics and global mindset for leading a *Transnational* enterprise.

Due to scope limitations, the remainder of this article will address only the first three components in the *Transnational* HR Model – Vision, Organization, and People – the ones that form the underpinnings of the enterprise and hence are critical to success for the global company.

## **STRATEGIC VISIONING**

*“An organization's success has enormously more to do with clarity of a shared purpose, common principles and strength of belief in them than to assets, expertise, operating ability, or management competence, important as they may be” (Dee Hock).*

Most companies have a vision statement, but does the HR department? Do you know how the company’s HR plans, policies, and programs align with the company’s overall global vision and strategic direction? How many vision statements have you participated in developing, only to find them stuffed in a drawer and not looked at again for another five years? Why do we continue to participate in such efforts, only to find ourselves repeating the same activities again and again with little or no progress?

Although there are probably many reasons (or perhaps more appropriately, excuses), I surmise that there are two major ones: the vision statement bears no relevance to the day-to-day activities of the people in the organization; and, there is no way to measure progress against the vision to know whether the organization is on the right track or whether they should be steering another course – and quickly!

The vision statement does not present a precise plan for the organization to follow, but rather sets the purpose and a clear sense of direction, defining a common set of values or guiding principles for the organization. Since the introduction of the Internet and with the increase in global mobility, the speed of change has accelerated substantially, rendering the creation of a detailed plan futile – it would be obsolete even before starting. Rather, our time is better spent in defining a clear vision and set of values and tying that vision to the organization’s strategic goals and specific objectives, then ensuring that all associates can see the relevance and connection between them. With a concise, well-understood vision, linked to a common and attainable set of objectives, the organization is better prepared to face the surprises the future will inevitably hold.

To help prepare for the future, many organizations use an approach called “Scenario Planning” (De Gues 1997, Georgantzis 1995, Schwartz 1991, Stambaugh 1999 and 2003). This process basically consists of thought leaders in the organization envisioning multiple, different scenarios – some likely, some unlikely – of what the future might bring – from war, to economic slowdown, to the emergence of a new competitor, etc. – and what the company’s reaction to that future might be – layoffs, acquisition, re-training, etc. “Using scenario planning, we can open a window into the future and do much of the identification and assessment before the event itself” (Stambaugh 2003). While the actual scenario will undoubtedly not happen exactly as it was envisioned, we will be better prepared to react cogently, swiftly, and effectively when some new event does occur, because we have exercised our minds and explored many different possible futures and outcomes. Scenario planning is an excellent way to promote out-of-the-box thinking, to open up new horizons, and to rid ourselves of the old ideas that inhibit truly creative, strategic thinking. Again in the words of Dee Hock, “the problem is never how to get new, innovative thoughts into your mind, but how to get old ones out.”

A practical approach to visioning and strategic planning can be found in Scott Bolman’s *IHRIM Journal* article, “Developing a Global HR Systems Strategy” (2001). As Bolman says, “simply put, strategy is about choices, or more clearly, the elimination of choices.” The goal of the strategic visioning and planning process is to review alternative approaches for the business, eliminating those that are not appropriate and focusing on one strategy at the expense of the others. Bolman defines five steps critical to creating an effective strategic HR business plan:

- ❑ Identify key drivers/business goals... to create alignment
- ❑ Identify global processes... to define the scope
- ❑ Identify current processes/systems... to establish a baseline
- ❑ Develop alternatives... to define the desired future state
- ❑ Evaluate/decide alternatives... to arrive at the best possible decisions

At the core of a solid HR business model are the articulation of a clear vision and set of business goals, based on the real activities of real associates in the organization – that is, global processes – and the development of an understandable and achievable strategic plan that is both qualitative and quantitative.

*Vision-to-Values Process (V2V)*. As previously stated, the first step in developing a chaotic, *Transnational* HR Model is to clearly define the overall vision, goals, and objectives the organization is trying to reach, tying that vision to specific, quantifiable values – that is, metrics. *The Vision-to-Values (V2V) Process* is a structured approach that ensures the organization’s vision and objectives are clearly defined, that all stakeholders are committed and aligned toward the same goals, and that value metrics are explicitly identified to meet the vision. The output of the V2V process is an explicit framework for the organization to operate within that defines a roadmap for the future. There are four basic steps to the V2V Process:

- ❑ SWOT Analysis
- ❑ Vision Definition
- ❑ Value Metric Identification
- ❑ Stakeholder Mapping

SWOT Analysis. The SWOT Analysis – a process of identifying the organization’s Strengths, Weaknesses, Opportunities, and Threats – is a well-established approach that many organizations use to assess their current state of affairs vis-à-vis the current market situation and economic environment (see Figure 2). The SWOT process consists of a series of brainstorming sessions in which the relevant areas of the organization are assessed and delineated. It is important to ensure appropriate and adequate representation in the SWOT process across the organization, both horizontally and vertically, to make certain different perspectives and approaches are being considered. The output of the SWOT is then used to develop the organization’s vision statement.

Figure 2. SWOT Analysis Process

<p><b><u>Strengths</u></b></p> <p>These are areas that the organization considers their strong areas – factors that give them a competitive advantage over their competitors.</p>	<p><b><u>Weaknesses</u></b></p> <p>These are areas that the organization feels they do not perform well in or are factors that are a disadvantage with respect to their competitors.</p>
<p><b><u>Opportunities</u></b></p> <p>These are the areas that the organization should explore to find opportunities to take advantage of their strengths and/or minimize their weaknesses.</p>	<p><b><u>Threats</u></b></p> <p>These are threats to growth, profitability, survival, competitive edge etc. if the organization does nothing or don’t take advantage of their opportunities.</p>

Vision Definition. Vision Definition is a statement of what the company expects to achieve in the future; it conveys the goals, objectives, and expectations of the company’s executives and key stakeholders. The Vision Definition step answers the question, “What is the organization’s *raison d’être*?” While there are many ways to express a vision statement, the most effective, in my opinion, is one that is concise (consists of one sentence), concrete (contains one or more specific objective(s)), action-oriented (begins with a verb), and measurable (identifies a quantifiable goal).

Value Metric Identification. The Value Metric Identification process brings a quantifiable dimension to the strategic visioning process by taking the objectives from the Vision Definition and assigning a value – or metric – to each (see Figure 3). The Value Identification step answers the question, “How will the organization achieve its stated vision?” Value Identification starts with the end result, identifying the outcome(s) or objective(s) the organization is trying to reach (e.g., improve service levels, decrease costs, build global infrastructure). Next, the relevant stakeholders are named, the current process is defined, the required inputs are identified, and the sources of the inputs are documented. Because they are measurable, value metrics put the “teeth” into the process and are the key drivers in tying the vision to the day-to-day business operations.

Stakeholder Mapping. Stakeholder Mapping is a well-established approach in the industry for identifying the interested parties who are directly involved in, have an influence on, or are simply interested in any given project, effort or enterprise (see Figure 4). Stakeholders include the organization’s associates, executives, board members, investors, stockholders, third party providers, vendors, etc. – anyone who is either directly or indirectly concerned with the effort. The Stakeholder Mapping process answers the question, “Who will be involved and influence the effort?” It consists of brainstorming with the relevant individuals and entities and identifying their potential impact on the effort, that is, their level of trust and

agreement with the goals of the organization. The goal of this process is to identify those stakeholders who are “allies”, and hence supporters of the effort, and those who are “opponents,” “adversaries,” and/or “double agents.” The purpose of this effort is to build strategies to leverage the “allies” and neutralize the others. In the ultimate chaordic organization, once the shared vision and guiding principles are defined, everyone should be aligned toward the common goal, with few adversaries, opponents, and double agents working against the vision.

Figure 3. Value Metric Identification Process

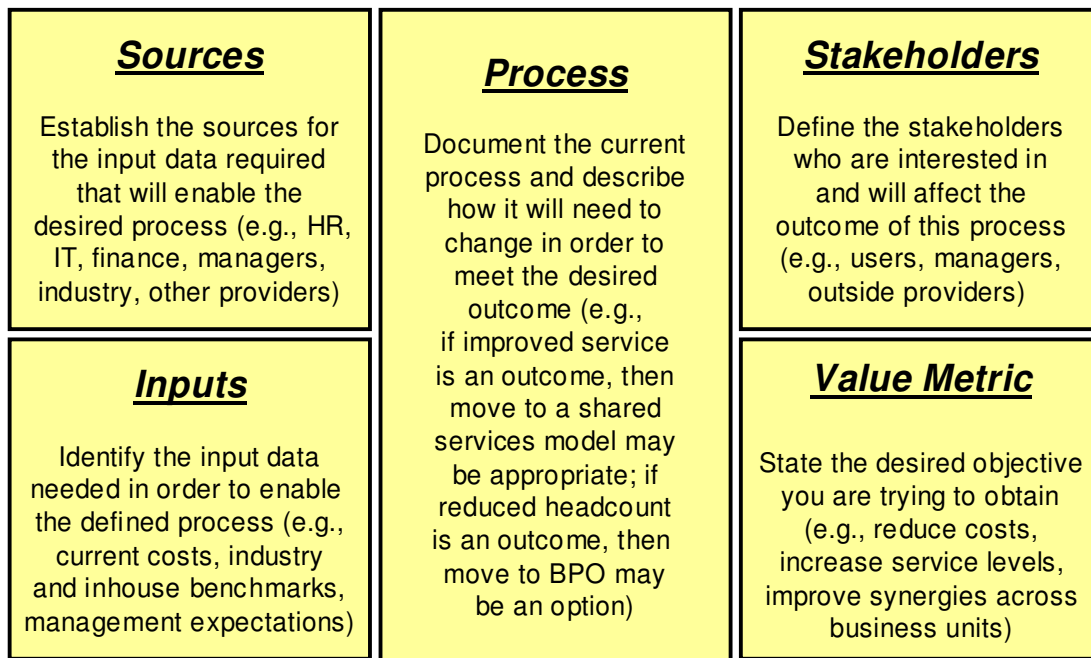
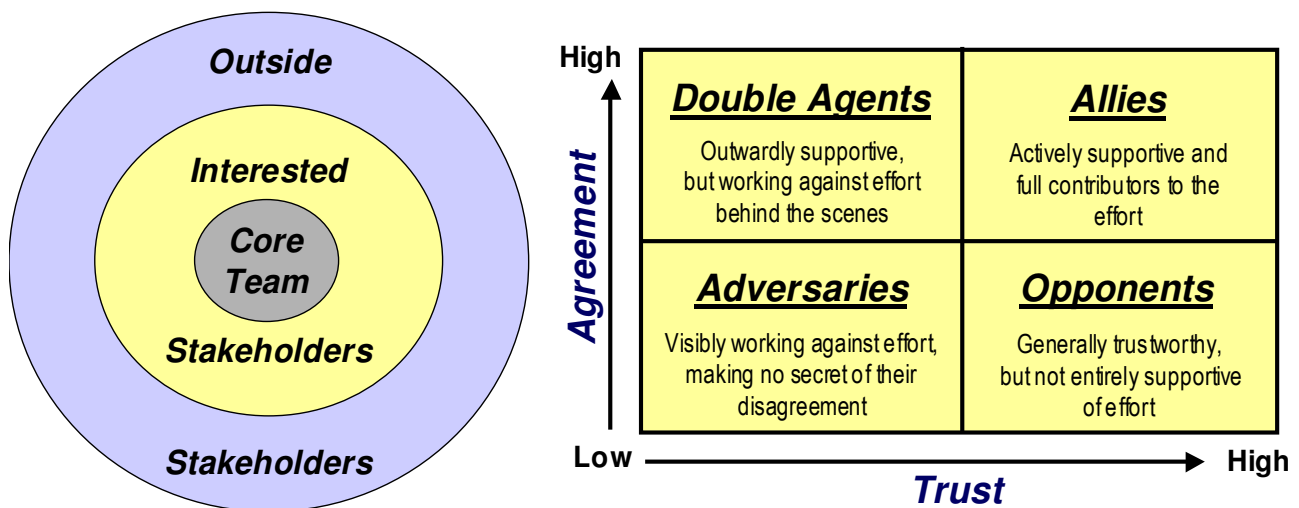


Figure 4. Stakeholder Mapping Process



## ORGANIZATIONAL DEVELOPMENT

*"No function should be performed by any part of the whole that could reasonably be done by any more peripheral part and no power should be vested in any part that might reasonably be exercised by any lesser part... Authority... [must] come from the bottom up, not the top down" (Dee Hock).*

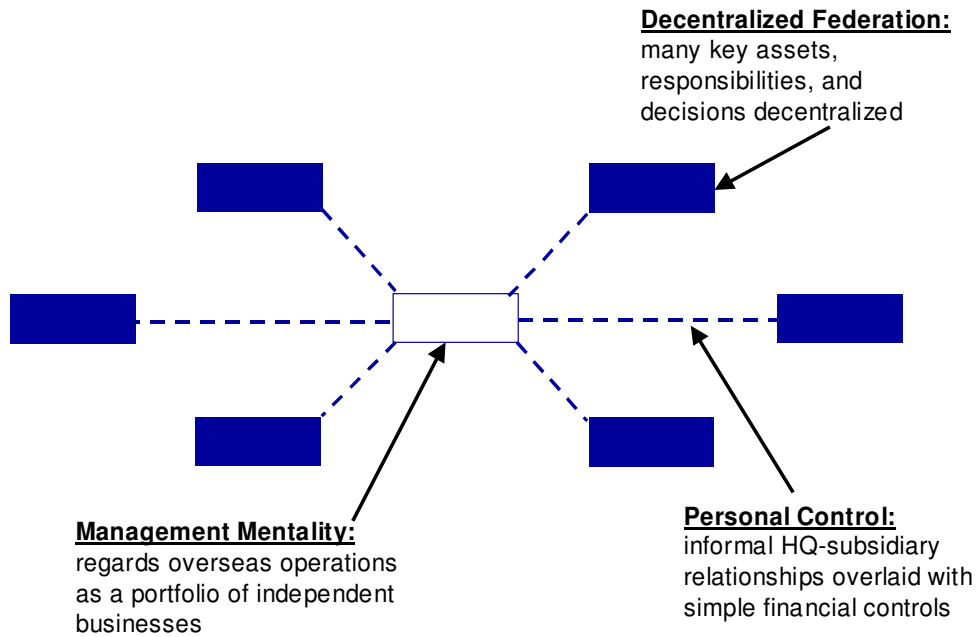
The second component of the chaordic, *Transnational* HR Model involves the organizational structure of the enterprise. Hock's theory of the chaordic organization is a synthesis of the theories of Lao Tse, Adam Smith, and Thomas Jefferson: rather than enforcing cooperation by restricting what associates in the organization can do, individuals are encouraged to compete and innovate as much as possible. In the chaordic model, the organizational structure is transparent, not controlling and delegating, rather guiding and empowering. To build this type of structure requires that responsibility and accountability be distributed to the lowest possible level in the organizational structure. Concepts like delegation, empowerment, and decentralization cannot be treated as the latest management fads dreamed up by over-paid consultants, but must be made real. We must follow Hock's mantra and transform our oppressive and stifling, albeit benign, dictatorships into prospering and highly productive democracies (Hock 1999).

Bartlett and Ghoshal's (1989) *Transnational* model embodies many of Hock's chaordic principles and provides the foundation for transitioning the global HR organization to meet the challenges of the paradox: it is responsive to local needs, cooperative for global activities, innovative to new ideas, and flexible to change. In their seminal book, *Managing Across Borders: The Transnational Solution*, they define four basic structures or models that organizations manifest in their global development:

- ❑ A *Multinational* organization is one that is highly decentralized, consisting of numerous independent local business units and little control at the center – generally not much more than financial oversight (see Figure 5).
- ❑ A *Global* organization is one that is highly centralized and standardized, minimizing the needs of the local business units in favor of one single, uniform operating environment – the “one-size-fits-all” approach (see Figure 6).
- ❑ An *International* organization, while still largely centralized, takes a learning and sharing approach by adopting innovations from local business units, integrating them into the global business model and rolling them back out throughout the organization (see Figure 7).
- ❑ A *Transnational* organization is a chaordic, networked structure with no centralized “controlling” unit per se, but with a well-defined set of centralized “coordinating” and “cooperative” processes that govern how the organization functions (see Figure 8). This type of organization is “enabling” and “self-organizing” – exemplifying effectiveness without being controlling and coercive.

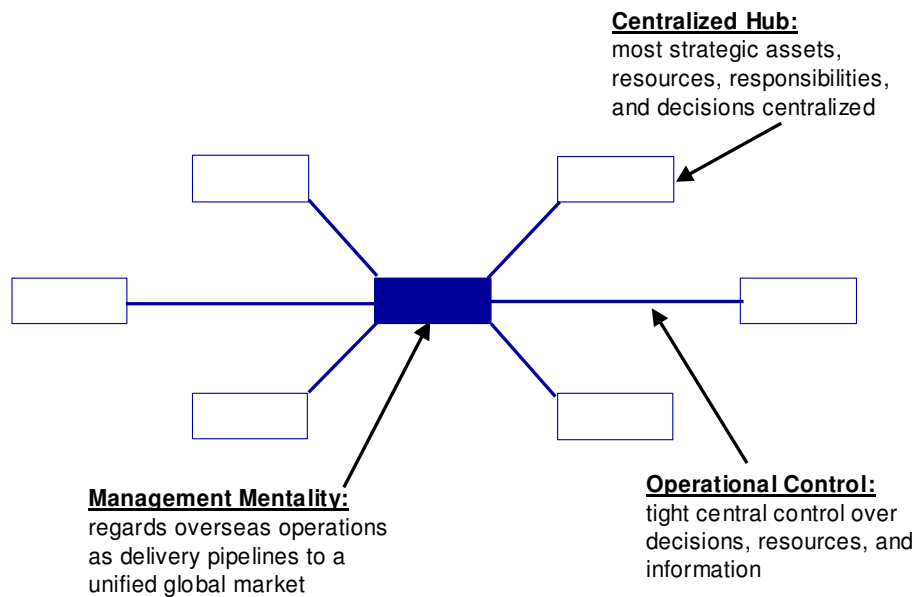
In their global evolutionary development, it has been postulated, that organizations evolve from a purely domestic stage through the *Multinational* and *Global* stages, then to the *International* stages, and ultimately to the *Transnational* stage (Beaman and Walker 2000, Beaman and Guy 2003) (see Figure 9). 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 intermediate stages in their development, jumping from one stage to another, in a “punctuated equilibrium” approach (Stambaugh, personal communication).

Figure 5. "Multinational" Model



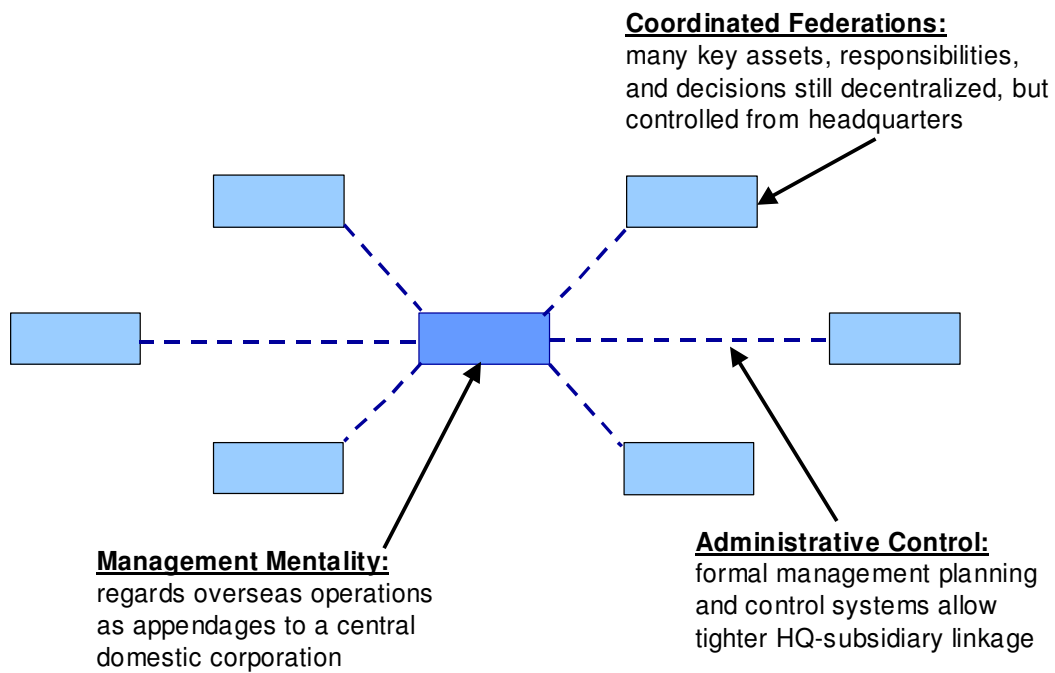
Source: Bartlett and Ghoshal 1989

Figure 6. "Global" Model



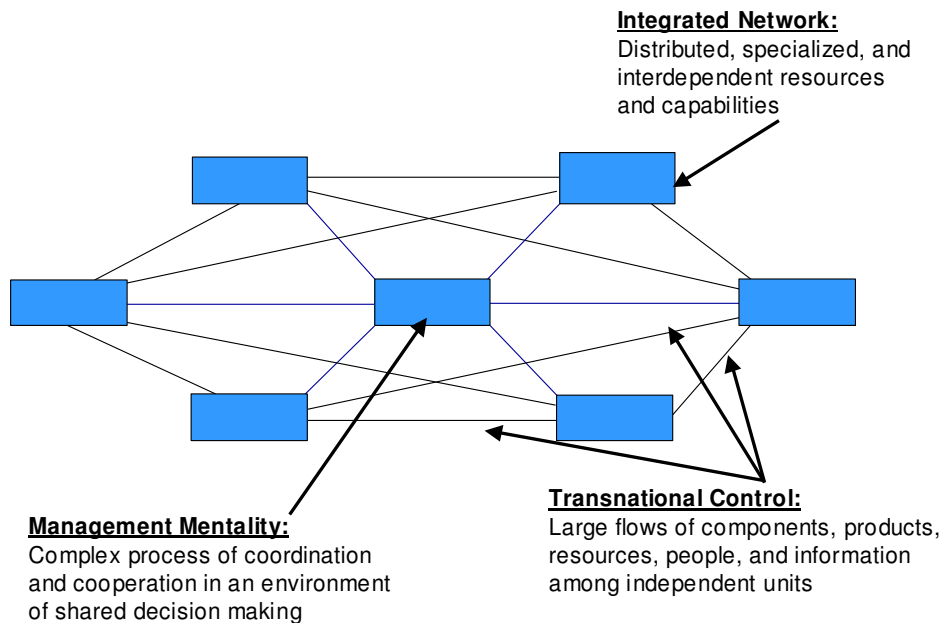
Source: Bartlett and Ghoshal 1989

Figure 7. "International" Model



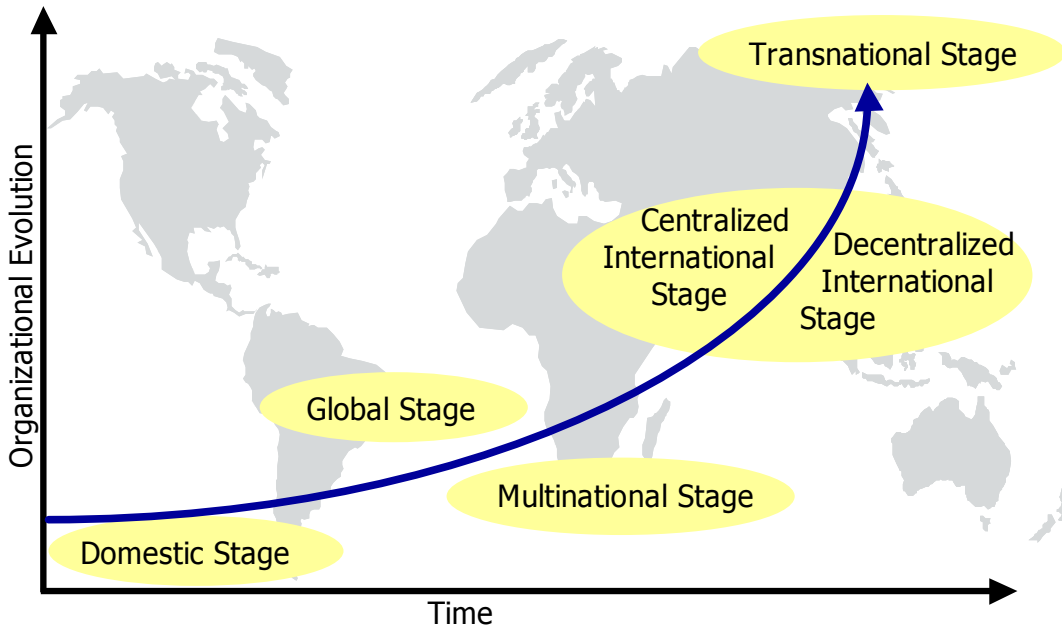
Source: Bartlett and Ghoshal 1989

Figure 8. "Transnational" Model



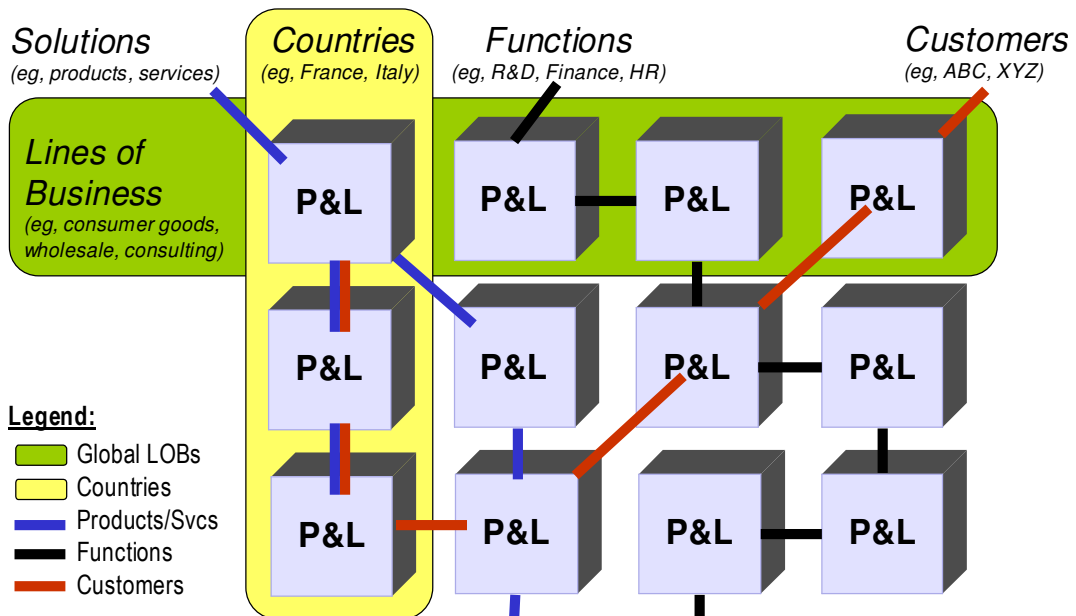
Source: Bartlett and Ghoshal 1989

Figure 9. Organizational Evolutionary Development Curve



Source: Beaman and Walker 2000, Beaman and Guy 2003

Figure 10. Multidimensional Multinational



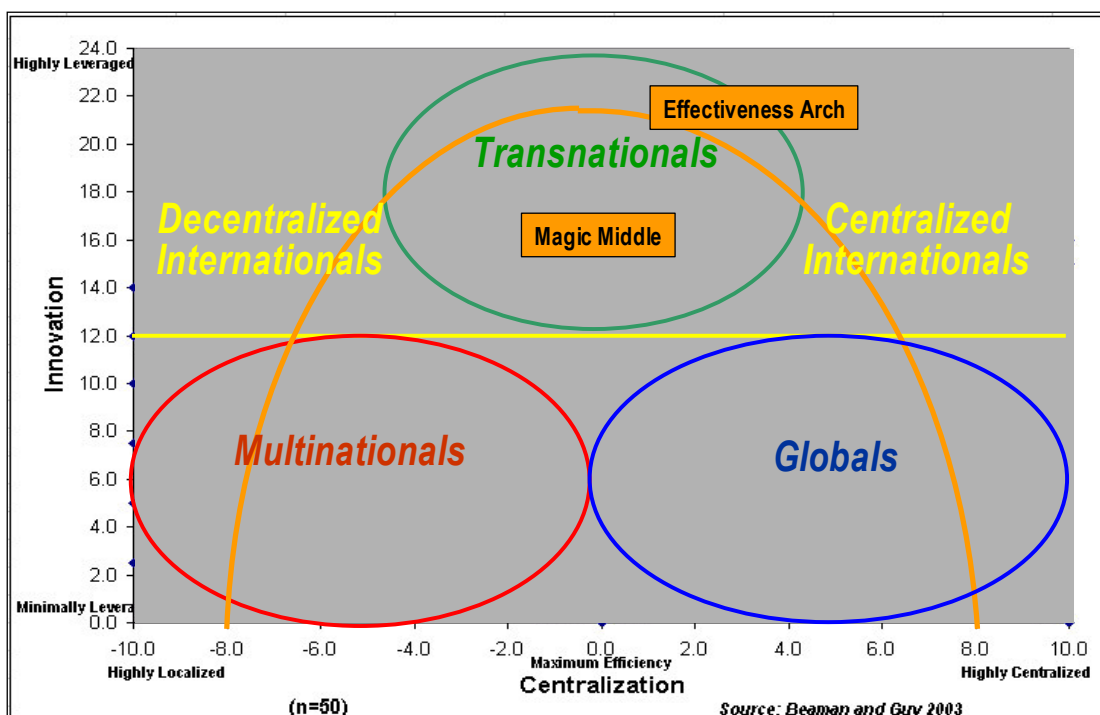
Source: Galbraith 2000

Jay Galbraith's (2000) "Multidimensional Multinational" exemplifies a practical approach to building a global organizational model that supports chaordic principles through its multi-structure approach to managing individual business units – and hence managers' objectives – across the corporation (see Figure 10). Profit and loss statements (P&Ls – indicated by gray square boxes in Figure 10) are defined at the lowest possible level (e.g., for a single product in a single country in a single line of business) and are then linked together for different managers and functions depending on their areas of responsibility. For example, one director may be responsible for all the lines of business in one country (indicated by the yellow shaded area in Figure 10), whereas another may be responsible for one product across different countries and functions (indicated by the blue line linking various P&L's together). Divisions are generally organized into global lines of business (LOBs) (indicated by the green shaded area in Figure 10). Likewise, customer relationship managers may be responsible for a single customer across multiple countries and product lines (indicated by the red line linking various P&L's). This multidimensional structure allows the organization to dynamically link individual "views" of the business, slicing and dicing the objectives and financials in various ways depending on the functional need and the type of business.

This multidimensional, *Transnational* model provides an approach for coordinating multiple, different objectives across diverse financial units and business functions in a chaordic manner. Such an approach is essential in any highly matrixed environment that demands different ways to evaluate and measure progress against goals. It is particularly relevant for a global HR business model because HR organizations are inherently matrixed: by their very nature, HR must answer to multiple chiefs and respond across diverse business functions and geographical units. The ability to implement an appropriate organizational structure with worldwide coordination capabilities is a key criterion in building a successful *Transnational* HR business model.

As previously mentioned, in order to effectively understand an organization's current structure according to Bartlett and Ghoshal's four models, significant consideration must be given to the heritage and corporate culture of the organization. For example, if the company has largely grown through an acquisition strategy, the *Multinational* model will prevail. If the company has grown primarily through an organic green fields approach, then the *Global* model will be more prevalent. The challenge is to move the organization in the direction of the *Transnational* model along the Evolutionary Development Curve (see Figure 9). To affect this change, it is critical to first understand where the company currently is in their development and then to uncover what practices can be employed that can best influence the necessary change(s).

Figure 11. Efficiency Innovation Model (EIM)



*Efficiency Innovation Model (EIM)*. In order to assess where an organization currently is along its evolutionary path in moving towards the *Transnational HR Model*, Beaman and Guy (2003) propose the *Efficiency Innovation Model (EIM)* (see Figure 11).

The EIM is based on the two dimensions most critical to the *Transnational* organization:

- ❑ *Efficiency* – the degree of centralization/decentralization, with the goal to provide optimal balance between central control and local independence (the horizontal axis in Figure 11), and
- ❑ *Innovation* – the degree of innovation that is supported and leveraged, with the goal to foster innovation and knowledge sharing across the organization (the vertical axis in Figure 11).

The basic tenet of the EIM is that an effective organization must find the right balance between centralization and decentralization in order to maximize innovation; overly decentralized organizations lack formal mechanisms for disseminating innovations throughout the company, while overly centralized enterprises allow innovations to languish in the field through the arrogance of corporate headquarters – the “not-invented-here” syndrome. The EIM predicts that organizations move along the “Effectiveness Arch” from either the *Multinational* or the *Global* stage, to the *International*, and ultimately, the *Transnational* stage, toward the “Magic Middle” – the point of optimal efficiency and maximum innovation (see Beaman and Guy 2003 for further details). Based on a pilot study of 50 global companies, organizations appear to be well distributed across Bartlett and Ghoshal’s four organizational models, with the most effective organizations clustering around the Magic Middle. These organizations are best positioned to take advantage of cost savings and productivity improvements through centralization and most able to leverage innovations and best practices through a high level of responsiveness to local requirements.

*Transnational Leading Practices*. Beaman and Guy (2003) also identified several industry trends and leading practices among the *Transnational* corporations in their study. One salient finding from their study is the more frequent occurrence of Shared Service Centers in *International* and *Transnational* organizations, highlighting these organizations’ focus on a high-level of efficiency and leveraging of shared infrastructure. *Transnational* organizations are also much more likely to have frequent face-to-face global HR meetings, facilitating sharing of ideas and communication across business units. They are also more receptive to new ideas from local and regional business units and to implementing common strategies across the organization – globally, regionally, and locally. Additionally, *Transnational* organizations also tend to use a single provider and/or technology platform globally for their HR solution, facilitating their ability to coordinate activities across the worldwide organization.

## **GLOBAL ORIENTATION**

*“Hire and promote first on the basis of integrity; second, motivation; third, capacity; fourth, understanding; fifth, knowledge; and last and least, experience. Without integrity, motivation is dangerous; without motivation, capacity is impotent; without capacity, understanding is limited; without understanding, knowledge is meaningless; without knowledge, experience is blind. Experience is easy to provide and quickly put to good use by people with all the other qualities” (Dee Hock)*

The third component of the *Transnational HR Model* that this article considers deals with the people who make up the organization and their global orientation, and hence suitability to work in a chaotic, *Transnational* environment. This aspect is undoubtedly the most critical, as well as the most complicated, component of the entire model. Nothing in business functions without people: people are the thinkers behind the ideas, the doers of the activities, the managers of the processes, the recipients of the services, the leaders of change. In any enterprise – indeed in any human endeavor – people are the fundamental asset that allows the effort to function and prosper. While there are many critical human attributes that interact in the professional environment, we discuss three aspects of this multi-dimensional issue that appear to be most relevant for building the people component of the *Transnational HR Model*:

- ❑ Motivation
- ❑ Cultural Adaptability
- ❑ Global Mindset

Motivation. Much research in this area has shown that individual characteristics (including age, gender, language, personality, prior experience, etc.) are inadequate predictors of success in an international setting. Rather, the principle attributes that make a difference are the individual's motivation and receptiveness to different cultures (Baruch 2002). Motivation appears to be both an inherent personal characteristic as well as a situational attribute heavily influenced by the individual's work environment. Other work suggests that motivation is stimulated by blending values from various cultures and establishing a single global vision and common set of objectives (Begley and Boyd 2000). Premoli's (2003) polynomial theory of motivation also argues that success is achieved when organizational values and individual objectives are closely aligned, thereby creating a motivating environment.

Consistent with these and many other observations about the connection between motivation and success, in their study of 90 expatriates, Beaman and Guy (unpublished research) also found a strong correlation between motivation and success in an international environment. The more motivated an individual was to learn the language, adapt to the culture, socialize with locals, etc., the more successful, and less frustrated, they were. Guy and Beaman (forthcoming) also found a strong correlation between motivation and the expatriate's satisfaction with their assignment: not surprisingly, successful individuals are more satisfied than dissatisfied ones; and quite naturally, satisfied individuals are more motivated.

Dee Hock's philosophy on hiring (see above quote) also supports the belief that motivation is a key attribute required for success in any endeavor. Of paramount importance in building an effective *Transnational* HR Model is the selection of highly motivated, alert, and committed associates to seed the organization. Motivated individuals are contagious: they propel others along with them. These are the desirable leaders in the organization – they build expansive and productive social networks that help the organization flourish. From these findings and other studies, it is clear the motivation is a strong determinant for success and an attribute that should be sought after in building a *Transnational* HR organization.

Cultural Adaptability. The new *Transnational* environment requires a plethora of individuals who can work internationally – who are ultimately flexible, accommodating, and adaptable to different cultures and varying ways of doing things. Studies on the success or failure of individuals in an international setting have indicated that American expatriates experience a failure rate of 30 to 40 percent as compared to many Europeans and Japanese, whose failure rate has been estimated as low as six percent (Tung 1988). It appears that some countries or cultures are more effective at producing successful global professionals than other countries.

Moore (2003) argues that there are 10 countries that produce the largest number of "good" global managers: Canada, the Netherlands, Switzerland, Belgium, Ireland, Sweden, Denmark, Singapore, Australia, and Finland. According to Moore, what these 10 countries have in common is their size. While they are not dominant powers in their geographic regions, they are considered significant players on the international stage. These middle-economy countries face the everyday reality that they are not the most important culture in their region and thus they find themselves constantly negotiating between their own culture and identity and that of surrounding dominant cultures. In order to be successful, individuals growing up in mid-sized countries learn to embrace multiple ways of looking at the world. They grow up with a duality (or plurality) that obliges them to work effectively with their neighbors. It is this ability to be "all things to all people" that helps such individuals to be successful in a global context. "When working on global teams or in other countries, the ability to think outside your own culture and see an issue through the eyes of another is critical to success" (Moore 2003).

In the field of psychology considerable work has been conducted on people's sensitivity to intercultural issues and their ability to adapt to other cultures and different ways of doing things. Some organizations have moved to personality testing to better ascertain the likelihood of success of individuals working in an

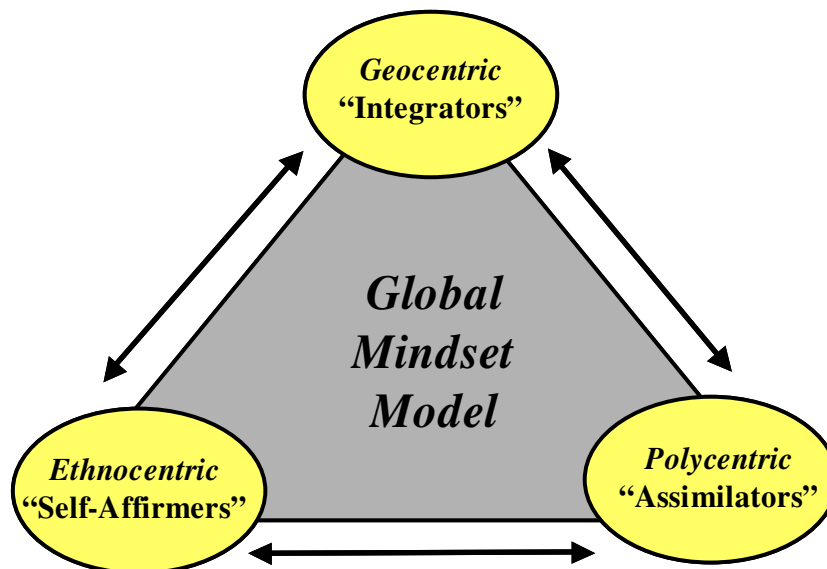
international environment. There are many approaches to personality assessment, and a number of assessment instruments are available (e.g., Myers-Briggs Type Indicator (Keirsey and Bates 1978), Big Five (Goldberg 1990), IDI Profile (Hammer and Bennett 1998), Global Awareness Profile (Corbitt 1998)).

Edward Hoffman (2002), a clinical psychologist working therapeutically with expatriate workers residing in the United States, noted in the clinical setting that several key personality traits seemed predictive of success for individuals living in a foreign country. The Hoffman’s Cultural Adaptability Inventory (HCAI) comprises four subscales assessing Intercultural Liking (an evaluation of a subject’s openness to other cultures), Risk-taking, Amiability, and Extroversion/Introversion. An individual’s score on this test can serve as a general predictor of suitability for international work experience, and hence likelihood of success as an expatriate.

Global Mindset. Much has been written on the influence of culture and global orientation on business (Hofstede 1980, Trompenaars 1998, Henson 2002), as well as on different “mental models,” “cognitive maps,” “states of mind,” “global mindsets” (Perlmutter 1969, Sullivan 2001, Guy and Beaman, forthcoming). Peter Senge (1994) defines mindset as those “deeply ingrained assumptions, generalizations, or ... images that influence how we understand the world and how we take action.” In the international environment, Daniel Sullivan (2001) has used global mindset to define how individuals “interpret, analyze, and decide situations in a world of falling boundaries.” He describes three basic models (see Figure 12):

- ❑ An *ethnocentric* mindset is one that basically holds one’s own values, beliefs, and culture are intrinsically superior to those of others. Ethnocentric individuals interpret the world through the eyes of their own culture, not recognizing, even devaluing, cultures that are different from their own. “If it works here, it’ll work anywhere,” exemplifies the ethnocentric individual. Ethnocentrics can play an important role in preserving standards and uniformity across the global corporation.
- ❑ A *polycentric* mindset is one that adapts and assimilates to the values, attitudes and beliefs of another culture. Because they are highly attuned to the conditions and expectations of other cultures, polycentric individuals can play the role of empathetic “advisors,” effective at bridging the gap and transferring knowledge between the local environment and corporate. The danger with the polycentric mindset is the tendency to “go native”, sometimes to the detriment of the organization’s objectives.

Figure 12. Global Mindset Model



Source: Sullivan 2002, Perlmutter 1969, Guy and Beaman, forthcoming

- ❑ A *geocentric* mindset is one that believes there are certain cultural universals and commonalities in the world and that no culture is superior or inferior to another. “The geocentric mindset accepts the premise that bright people [do] bright things around the world” (Sullivan 2001). Also called “cosmopolitans,” these types of individuals focus on “finding commonalities . . . [and] spread[ing] universal ideas and juggl[ing] the requirements of diverse places” (Kanter 1995).

Sullivan's premise is that there is no one ideal mindset; rather, we need to seek out the right mindset depending on the job to be done. Ethnocentric individuals are appropriate in roles where there is a need to preserve the company's standards and provide a uniform approach. Polycentrics are effective in roles that require a deep understanding of the language and local market conditions in order to be effective. In the *Transnational* organization, a geocentric mindset that transcends cultural boundaries and seeks commonalities in beliefs and practices across the universe is critical.

Along the same lines as Sullivan's global mindsets, Bartlett and Ghoshal (1992) contend that there is no such thing as one single ideal type of global manager; rather, there are four different types of global leaders that are needed in order to build an effective *Transnational* organization:

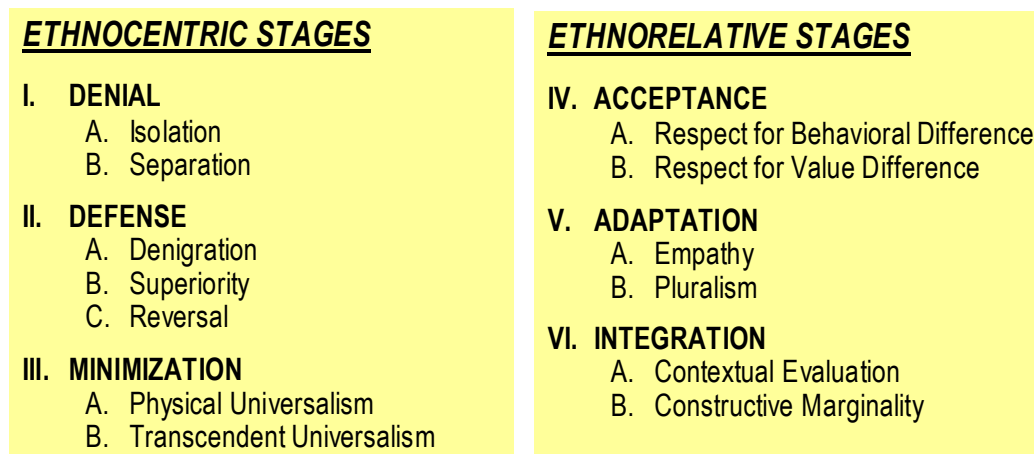
- ❑ *Business Managers* (cf. “ethnocentric”) support a single set of uniform operational standards and oversee the efficient distribution of assets across the organization by coordinating activities and linking capabilities and resources across the globe. They serve as the global strategists, business 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* (cf. “polycentric”) 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. However, “sometimes a country manager must carry out a strategy that directly conflicts with what he or she has lobbied for in vain” (Bartlett and Ghoshal 1992).
- ❑ *Functional Managers* (cf. “geocentric”) 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* (cf. corporate sponsors) 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 the *Transnational* organization, it is vital to maintain a balance among all four types of managers, using expatriate assignments and job rotation practices to ensure that associates 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, able to perform in a variety of roles and capable of wearing many different hats.

*Developmental Model of Intercultural Sensitivity.* Milton Bennett's Model of Intercultural Sensitivity provides a useful roadmap for understanding the acquisition and maturity of individual cultural awareness

and global orientation. Bennett (1993) postulates a development progression that that all individuals go through as they develop into geocentrics or cosmopolitans (see Figure 13). As individuals mature globally, they move from the “ethnocentric” stages of denial, defense, and minimization to the “ethnorelative” stages of acceptance, adaptation, and integration. Other empirical work has demonstrated that the more international experiences individuals have, the less ethnocentric they become (Guy and Beaman, forthcoming). Hence, associates who have reached the ethnorelative stages of their individual development – those with geocentric mindsets – are vital for the new chaordic, *Transnational* HR organization to function effectively.

Figure 13. Developmental Model of Intercultural Sensitivity



Source: Bennett 1993

Global Orientation Evaluation (GOE). Uniting each of these people-related aspects, we can build a global orientation component in our *Transnational* HR Model to evaluate the suitability of individuals to work in a chaordic, *Transnational* environment (see Figure 14). There are four basic parameters to the global orientation component of our *Transnational* HR model:

- ❑ *Hoffman’s Cultural Adaptability Inventory (HCAI)* – a tool for evaluating the basic, intrinsic personality characteristics vital to individuals in an international setting (Hoffman 2001).
- ❑ *Beaman Guy Global Mindset Scale (GMS)* – a technique for assessing an individual’s mindset – from ethnocentric to polycentric to geocentric (Guy and Beaman, forthcoming)
- ❑ *Bennett’s Developmental Model of Intercultural Sensitivity (DMIS)* – a method for evaluating an individual’s position on the development continuum of intercultural sensitivity (Bennett 1993).
- ❑ *Motivation* – an elusive personality characteristic that seems to be a major driver of success.

Figure 14. Global Orientation Evaluation (GOE)

**Hoffman Cultural Adaptability Inventory (HCAI)**

<u>Not suitable</u> HCAI < 0	<u>Challenging</u> HCAI 0 - 24	<u>Likely Success</u> HCAI 25 - 39	<u>Probable Star</u> HCAI > 40
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**Beaman Guy Global Mindset Scale (GMS)**

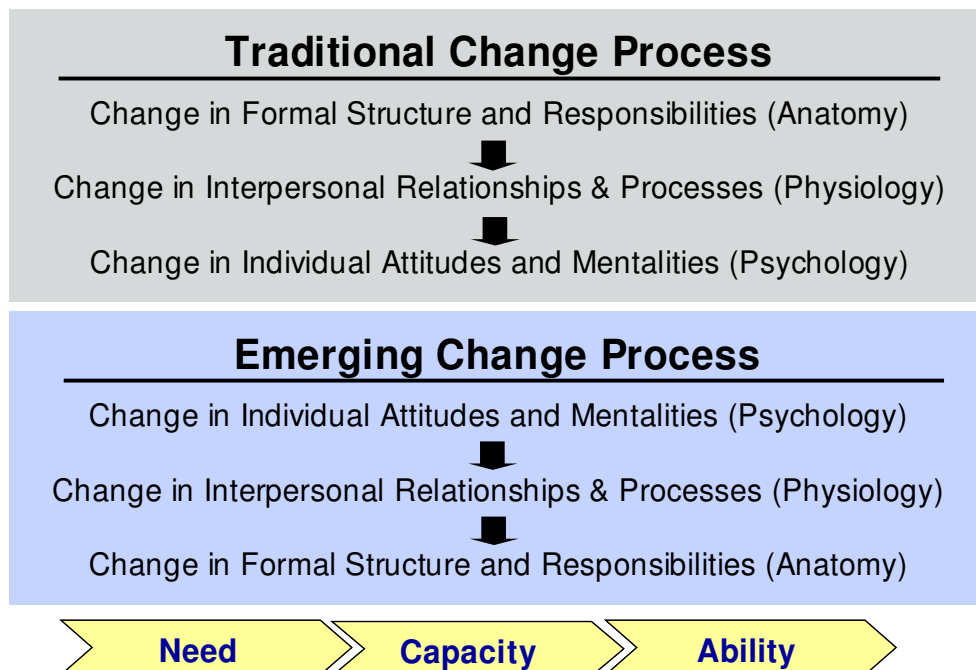
<u>Ethnocentric</u> GMS -3 to 3	<u>Polycentric</u> GMS 4 to 10	<u>Geocentric</u> GMS 11 to 15
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**Bennett Developmental Model of Intercultural Sensitivity (DMICS)**

<b>Ethnocentric Stages</b>			<b>Ethnorelative Stages</b>		
<b>Denial</b>	<b>Defense</b>	<b>Minimization</b>	<b>Acceptance</b>	<b>Adaptation</b>	<b>Integration</b>



Figure 15. Transnational Change Process



Source: Bartlett and Ghoshal 1989

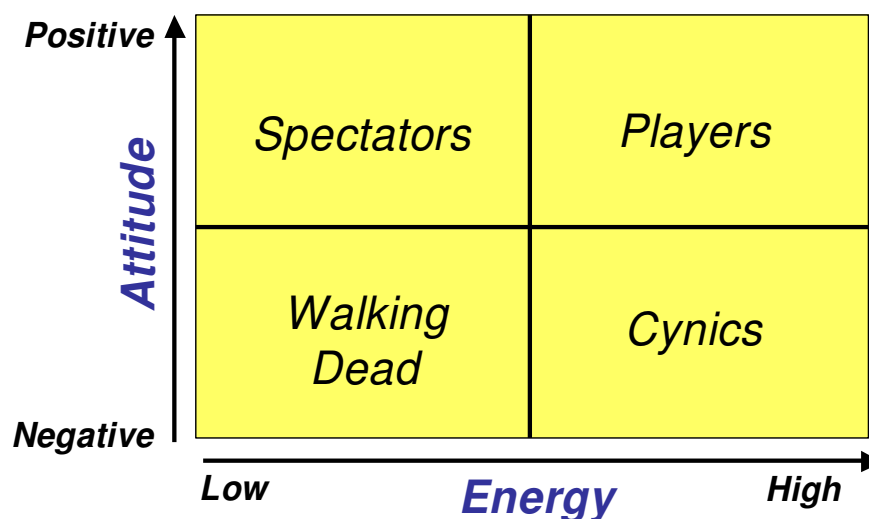
## CHANGE FACILITATION

*"Lead yourself, lead your superiors, lead your peers, and free your people to do the same. All else is trivia" (Dee Hock).*

So once the new *Transnational* enterprise has been defined and built, how do you get people on board with the change? The change process itself is at the core of the *Transnational* HR Model (see Figure 1). 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 Rummier 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 15).

An important component in facilitating change is to identify the individuals who are supporters and champions of the new initiative and those who are opponents and possible detractors to the effort. Similar to the Stakeholder Mapping process (see Figure 4) discussed earlier, Don Tosti's Energy Investment Model (see Figure 16) 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 an vital aspect of the change facilitation process.

Figure 16. Energy Investment Model

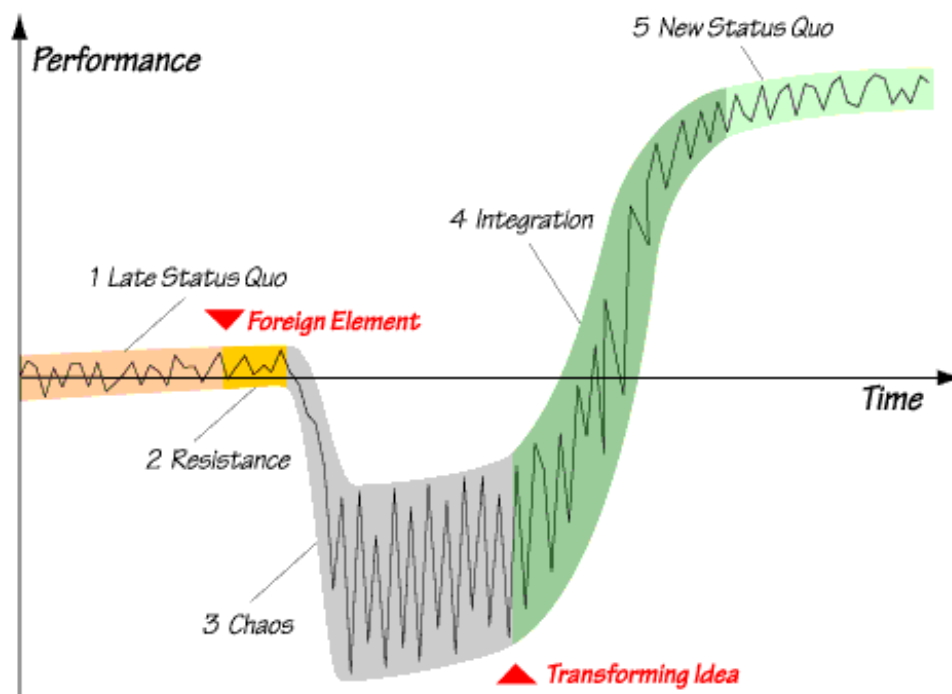


Source: Don Tosti

The well-known family psychologist, Virginia Satir (1991), provides a useful model for understanding the change process as it happens within individuals. Satir's model encompasses five stages that individuals go through as they change (see Figure 17):

- ❑ *Status Quo* – This is the current environment before a change emerges. This steady states 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 17. 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's not possible to skip steps along the way. The challenge for HR leadership 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. Figure 18 provides some guidelines to help people move effectively through the stages of the change process.

**Figure 18. Facilitating the Change Process**

Stage	Description	How to Help
1	Old Status Quo	Encourage people to seek improvement information and concepts from outside the group
2	Resistance	Help people to open up, become aware, and overcome the reaction to deny, avoid or blame
3	Chaos	Build a safe environment that enables people to focus on their feelings, acknowledge their fear, and use their support systems; help management avoid attempts to short circuit this stage with magical solutions
4	Integration	Offer reassurance and help finding new methods for coping with difficulties
5	New Status Quo	Help people feel safe so they can practice

Source: Virginia Satir 1991

## **TRANSNATIONAL COMPETENCY**

*“Given the right chaordic conditions, from no more than dreams, determination and the liberty to try, quite ordinary people consistently do extraordinary things” (Dee Hock).*

This brings us to the question of how do you build chaordic-like, *Transnational* competency in your organization. This section will highlight four basic strategies that are critical to advancing *Transnational* competency across the enterprise:

- ❑ Establish a Clear Vision
- ❑ Foster a Transnational Outlook
- ❑ Transform the Organization
- ❑ Communicate Actively

### *Establish a Clear Vision*

Of overarching importance is the ability to establish a clear vision through the *Vision-to-Values Assessment* process. Without a clear vision and specific, measurable goals and objectives, the organization will flounder. Some specific guidelines to help you with this process are:

- ❑ Ensure that the vision depicts a compelling need for change and that all associates are involved in the solution and keenly aware of how the change will improve the current situation
- ❑ Ensure that the change plan clearly demonstrates the WIIFM principle – “What’s In It For Me?” – so that associates can relate the results of the change to their day-to-day lives

- ❑ Involve multiple, diverse stakeholders in the process from various lines of business and multiple levels in the organization to ensure buy-in throughout the enterprise
- ❑ Gain commitment from all stakeholders – those both directly and indirectly involved in the success of the effort – and neutralize the opponents and cynics
- ❑ Establish priorities openly and logically – remember, “we can do anything, but we can’t do everything”
- ❑ Create objectives/metrics that are easily quantifiable and measurable and that can be influenced by those concerned
- ❑ Set up processes to regularly and publicly report on the status of the objectives, encouraging “friendly” competition among business units to “beat the numbers”
- ❑ Build an environment that fosters honesty, openness, and freedom of expression to encourage the free flow and exchange of ideas

### *Foster a Transnational Outlook*

*Transnational* competency entails fostering a new outlook – a new way of thinking and acting that continually looks to leverage new ideas and opportunities wherever they appear. Moving to a *Transnational* culture requires cultivating a shift in attitude throughout the organization – from one of “controlling a hierarchy” to one of “managing a network” of interconnected parts and activities. Emphasis must be placed on the process of socializing individuals into the *Transnational* business culture and building an outlook – a mentality – that appreciates the need for multiple strategic capabilities, analyzes problems and opportunities from the global, regional, and local perspectives, and interacts with others across the organization with openness, alertness and agility.

Following are some basic guidelines to consider when fostering a *Transnational* outlook and transforming the global mindsets of international associates:

- ❑ Encourage multiple overseas assignments for all key associates in order to broaden their experiences and to build an awareness of the impact of culture on business success
- ❑ Consider the type of international assignment and match the global mindset of the associate with the skills required to meet the objectives of the position
- ❑ Develop strategies to seek out motivated, engaged, alert, and committed individuals to lead the new organization
- ❑ Ensure explicit performance measures are in place to reward those responding positively to the change and to alienate – transition out – those who are not
- ❑ Recognize that people go through different stages of the change process in different ways and at different speeds and provide the needed individualized support and flexibility
- ❑ Transform corporate thinking from the traditional control-oriented and hierarchical management style to a flexible and delegating leadership style
- ❑ Put emphasis on learning, sharing, self-development, socialization, and acculturation to this new way of thinking

### *Transform the Organization*

To build the enabling organization that Dee Hock espouses requires commitment to egalitarianism and eradication of authoritarianism. The organization must support a peer-to-peer communication structure that facilitates collaboration across space and time. Following are some general guidelines to help in building the chaordic, *Transnational* HR organization:

- ❑ Identify appropriate *Transnational* practices to implement in your organization based on the organization’s culture and corporate history
- ❑ Build a matrix in associates’ mind, creating an understanding of the need to support multiple objectives simultaneously

- ❑ Define roles and responsibilities clearly, being careful to set visible lines of authority and avoid overlapping responsibilities
- ❑ Foster multiple levels of decision-making, pushing accountability to the lowest level possible in the organization
- ❑ Ensure that the change process has active senior management sponsorship and visible support; without support from the top, the change will fizzle and die
- ❑ Craft strategies to effectively coordinate activities and facilitate knowledge sharing across the *Transnational* network
- ❑ Encourage competition, cooperation, and sharing among business units, banning the “not-invented-here” syndrome

### *Communicate Actively*

To build a *Transnational* HR model, a solid communication network must be put in place that facilitates coordination, encourages sharing, and enables cooperative work among individuals and business units in far-flung places. With the ubiquity of the Internet, the growth of social networks and communities of practice, and the ever-increasing compatibility of global software and service providers, online real-time collaboration across the globe is becoming a reality.

As with any new initiative, proactive, frequent, and widespread communication is of paramount importance. It is essential to set up a detailed global communication plan that includes methods, media, frequencies, audiences, and messages to be conveyed. Some formal processes and tools need to be developed and put in place across the organization to ensure that information is getting to the right people at the right time. Some communication and collaboration approaches to consider are the following:

- ❑ Build a comprehensive communication plan that explicitly details the who, what, where, when, and why of the message to be communicated
- ❑ Hold annual company conferences, physically bringing people together across the organization to discuss and work issues
- ❑ Set up regular strategic “theme” meetings targeted to specific topics and audiences and empower ad hoc development committees to keep people involved
- ❑ Make extensive use of new technologies for tele-, video-, and web-conferencing to hold monthly and quarterly meetings
- ❑ Implement or expand company or HR newsletters to incorporate updates on the strategic vision, organization change, and people orientation initiatives underway
- ❑ Foster communities of practices and build knowledge bases to facilitate effective collaboration across space and time

## **CONCLUSION**

*“Substance is enduring, form is ephemeral. Failure to distinguish clearly between the two is ruinous. Success follows those adept at preserving the substance of the past by clothing it in the forms of the future” (Dee Hock).*

As Hock illuminates, the ability to understand, preserve, and leverage the past (i.e., the cultural heritage of the organization) in order to build the future (i.e., the new chaordic, *Transnational* HR model) is key to finding the right structure and gaining wide-reaching acceptance throughout the organization. Bartlett and Ghoshal’s *Transnational* model provides an important “transitional” stage that can help organizations move from their structured, regimented past to the new chaordic entity of the future. Of course, 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 and the transformation of the mindsets of the associates.

The fundamental message in this article is that no organization can succeed today with a relatively uni-dimensional strategy, emphasizing mainly efficiency or focusing primarily on local needs or leveraging merely the mother company's capabilities. To be competitive, we have to become masters of the paradox and be all three things simultaneously: globally efficient, sensitive to the needs of local business units, and, at the same time, with the facility to leverage innovation and worldwide learning across the enterprise. To function effectively in the new chaordic organization, we have to develop globally alert associates who are motivated to succeed and are committed to the company's strategic vision and objectives. It is only by embracing these chaordic, *Transnational* principles that we will be successful in the increasingly complex and ever-changing world. In closing, I leave you with one final quote from Dee Hock:

*"If one is to properly understand events and to influence the future, it is essential to master four ways of looking at things: as they were, as they are, as they might become, and [most importantly] as they ought to be" (Dee Hock).*

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