CULTURAL INTELLIGENCE (CQ) AND GLOBAL BUSINESS LEADERSHIP: EMBRACING THE SPIRIT OF THE CHAMELEON

By

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Abstract.

This literature review and academic inquiry looks at the role of Cultural Intelligence in effective global leadership and global learning. The definition of Cultural Intelligence being adopted for the purposes of this paper is “the ability to interact effectively with people who are culturally different” offering by Thomas (2006). The premise underlying this review and inquiry is that Cultural Intelligence plays a significant role as an enabler in a global firm, when understood and facilitated well. This paper determines that this capacity can be developed in all people to make for more effective interactions when dealing with situations that involve cultural differences.

Through this research I have found that success in global learning and global leadership calls for a heightened degree of sensitivity to differences in how people situate themselves in the context of their cultures and how this informs their perspectives and responses. I have found that attempting to facilitate learning as well as deploying leaders across a global firm in the absence of Cultural Intelligence has a negative and costly impact. To be successful one has to be able to “embrace the spirit of the chameleon”, thereby being able to adapt to, blend in with, and even reflect back the nuances of the various cultural idiosyncrasies one finds themselves operating within in a global organization.

“To be culturally intelligent requires embracing the spirit of the chameleon”.

Rasheed Joseph-Young.
Dedication

To my three children Ashley, Elijah and Levi who are a source of inspiration and unfailing love and support, they give purpose to my life. This work has not been possible without them.

I also wish to acknowledge the incredible support, patience and encouragement from my professor Dr. Elizabeth Lange who challenged me to excel in discovering my true inner thoughts, convictions and abilities in completing this work.
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>5</td>
</tr>
<tr>
<td>Situating Myself</td>
<td>7</td>
</tr>
<tr>
<td>Five Scenarios</td>
<td>11</td>
</tr>
<tr>
<td>Theoretical Exploration: Cultural Intelligence Defined</td>
<td>14</td>
</tr>
<tr>
<td>Cultural Intelligence as a Multidimensional Construct</td>
<td>16</td>
</tr>
<tr>
<td>Applicability of Cultural Intelligence in International Business</td>
<td>23</td>
</tr>
<tr>
<td>Analysis of the Literature- Applying Cultural Intelligence to Global Business</td>
<td>28</td>
</tr>
<tr>
<td>The Role of Educators in Mediating Cultural Intelligence</td>
<td>30</td>
</tr>
<tr>
<td>Organizational Learning in Global Culture: a Description and Analysis of my Employer.</td>
<td>35</td>
</tr>
<tr>
<td>A Descriptive Look at the Enterprise</td>
<td>36</td>
</tr>
<tr>
<td>The Canadian Learning Culture</td>
<td>36</td>
</tr>
<tr>
<td>The Global Learning Experiment: On the Ground Insights into Enterprise Learning</td>
<td>37</td>
</tr>
<tr>
<td>The United States of America</td>
<td>40</td>
</tr>
<tr>
<td>The Caribbean</td>
<td>42</td>
</tr>
<tr>
<td>The United Kingdom</td>
<td>46</td>
</tr>
<tr>
<td>Applied Analysis and Recommendations from the Literature</td>
<td>48</td>
</tr>
<tr>
<td>Recommendation One: Cultural Brokering</td>
<td>49</td>
</tr>
<tr>
<td>Recommendation Two: Cultural Intelligence and Leadership</td>
<td>51</td>
</tr>
<tr>
<td>Assessment tools</td>
<td>53</td>
</tr>
<tr>
<td>Recommendation Three: Intercultural Training</td>
<td>55</td>
</tr>
<tr>
<td>Discussion, Future direction and Conclusions</td>
<td>59</td>
</tr>
<tr>
<td>Bibliography</td>
<td>65</td>
</tr>
</tbody>
</table>
Introduction

In the era of corporate globalization and with the increased reliance on cross-cultural managerial assignments as well as the growing implications of multinational teams, global organizations, and international joint ventures; it is critical that we gain a better understanding of the factors that enable employees and managers to perform effectively in cross-culturally diverse contexts. This calls for a greater awareness and understanding of the nuances of various cultures and their norms and practices which foster the smooth transacting of business and social interaction. I propose that in today’s global organizations, where individuals must skillfully interact with or manage others with diverse perspectives and cultural backgrounds, a well-defined construct of Socio-Cultural Intelligence would likely improve leadership techniques, personnel selection systems and training interventions thus providing a competitive edge for individuals and corporations. I am curious as to whether it can be developed in all people to make for more effective interactions when dealing with situations which involve cultural differences.

Thus, in this paper, I seek to answer three questions based on a review of existing literature on the subject of Cultural Intelligence (CQ).

(1) What is Cultural Intelligence and what is its relevance in the global workplace?

(2) What role does Cultural Intelligence play in the effectiveness of the design and delivery of learning solutions in a global firm?

(3) What role does Cultural Intelligence play in leadership effectiveness in a global firm?
I will establish a clear definition of Cultural Intelligence and explore various conceptual frameworks. I will attempt to bring together the answers to these three questions by looking at the theoretical link (if any) among them with the intent to be able to discover and assess how the notion of Cultural Intelligence might be an enabler in a global firm, when understood and facilitated. It is expected that attention to Cultural Intelligence can move the speed of business forward by enabling communication to be more relevant and learning to become more situated in local culture; leading to it’s permanence. I am searching for evidence that culturally intelligent leaders connect more quickly and easily with the people they are leading and develop trust faster; hopefully driving employee engagement and business productivity.

I will conduct a review of literature on the topic of Cultural Intelligence, in which I will seek to inform my practice of global learning and leadership development by better understanding various conceptualizations of Cultural Intelligence and its relevance, if any, in today’s corporate environment. I will critically examine the relevance to the area of adult learning and leadership effectiveness in a global financial institution and consider the applicability of various conceptualizations of Cultural Intelligence for guiding training initiatives in a cross-cultural, global corporate context. I will start with a theoretical exploration and definition of Cultural Intelligence. By reviewing, assessing and comparing and contrasting the various thought leaders on the topic of Cultural Intelligence, I will examine their approaches and present a definition of CQ. The second section of the paper will examine applications of CQ in the work of adult learning, establishing a centralized global learning function and global leadership. I will be drawing from my own experiences in working with learning and leadership development around the globe in approximately 50 countries during the past eleven years. Finally I will seek to
integrate selected elements of theory and application by comparing them to concepts of adult education and leadership development.

**Situating Myself**

I am keenly interested in the area of Cultural Intelligence and its impact on global learning and leadership as I am faced with trying to understand the successes and failures of learning programs and leaders in a vastly global and multicultural corporation. At a more personal level I am a bit of a cultural anthropologist (at a touristic level) and at the employment level, my work in performance consulting exposes me to the areas of diversity awareness, training, and leadership development in a global firm. What has shaped my worldview? Why have I been magnetized to the work I do and the role I play in society? Why do I feel called to do and fulfilled in doing the work of challenging the hearts and minds of people to relinquish old paradigms, to embrace personal emancipation, and to realize their full potential? Considering my impoverished and deprived upbringing - a perfect recipe for a repetitive dysfunctional cycle - what has helped me to break the cycle?

I was raised the youngest of ten children in a poor lower class family in the South Caribbean by an uneducated single mother with a will of steel and a resolve to provide and survive. As a child I initially accepted our position/place in society as pre-destined and circumstantial with very little agency to transform our situation. One critical turning point for me was when I realized that equality and liberation from class and caste structures may rest within the individual resolve to gain an education for personal and family advancement. It was my one chance to break free and escape the endemic cycle of oppression of the lower class. My focus was not on the liberation of society at large but on individual transformation which could overflow into society. I believe that
one needs to take personal responsibility and act to improve their situation rather than sit back and blame the oppressors.

I learned the values of self-sacrifice, hard work, honesty and tenacity in my early childhood. I hold a very optimistic humanistic view of society and people in general. I believe that people are generally good and want to do the right thing if given the right opportunities and resources to do so. A strong education is one of those fundamentally important tools. I had accepted the prevailing ideology as presented by my teachers, often fraught with their own desire to reproduce the existing power structures. Yet, it was learning nonetheless, even if it had to be unlearned, as it gave context to understanding my current state as well as motivation and insight into what my true potential could be. I was determined to change the cycle for my generation so I applied myself to my studies and I excelled in class. I draw on a humanistic approach, followed by the ideals of progressivism with bridges into the radical paradigm, in support of my belief “in developing the human to their fullest potential”. My life’s experiences caused me to think critically about the meaning perspectives and the meaning schemes I held of the world. I moved to Canada about twenty two years ago at the age of twenty three and found many of the paradigms I held were challenged and new personal paradigms were formed through cultural awareness and education. My held views, knowledge, beliefs, values and feelings were confronted with many contradictions which did not fit into my worldview and were further challenged as I moved into the work I currently do. This journey of understanding life, self and human potential has been ongoing and has served well in helping me find alignment and meaning in the career path I have evolved into.
Today as an international performance consultant, I see my mission as contributing to shaping a high performance culture in our organization by facilitating transformational learning. I have been given the privilege of engaging people’s minds and hearts in an attempt to challenge their held paradigms or validate them as they relate to the values and ambitions of our organization. The values of the firm are not forced upon employees, but rather they are presented as a framework for our organizational culture, decision making and employee engagement and so employees either find immediate alignment with their personal values or they to seek to reconcile the two. I use the term reconcile because my organization subscribes to the thinking that one cannot simply impose the firms values on employees. I do this by travelling to over fifty countries in the world on an annual basis and facilitating learning on various topics of “management excellence”. I touch over five thousand learners each year in an organization which employs about eighty thousand people dispersed in over fifty countries. I believe that learning is an individual motivation issue; ‘the inert desire to be’ executed by deliberate and intentional actions. It is this inert desire to be that propels one to take action to sustain or change one’s circumstances and provides the fodder of motivation to embrace “learning” in a purposeful way. I subscribe to the thinking that the self has potential for growth and development and that any subject matter is not the end but a means for cultivating the self, where knowledge of self furthers growth toward self actualization. I also believe that any change of society is achieved through the development of the individual. From a progressive perspective I believe in teaching the learner to fish rather than giving a fish because once intelligence is trained and applied to what interests the learner, the study of organized and more abstract knowledge is possible. I see the facilitator as a partner-helper to the learner. I see learning as an equalizer to battle the inequities which prevail in society and in many organizations, thus resulting in social
transformation. I believe that all of this learning has to be centered in, mindful of and presented in the context of the local social prevailing culture. The learning process ought to be reflective of and situated in the nuances of the local culture, so as to be culturally intelligent.

There are many intelligences….social, emotional, academic, interpersonal, real-world, practical and cultural (Earley & Ang 2003; Sternberg, 1986, 1988; Hedlund & Steinburgh, 2000; Gardner, 1993; Goleman, 1995; Salvoey & Mayer, 1990). These all align with the definition of general intelligence as, “the ability to grasp and reason correctly with abstractions (concepts) and solve problems” (Soon Ang & Linn Van Dyne 2008). Cultural diversity actually presents critical challenges to people all over the world even though globalization is regarded by some as a “flattening out” of cultural differences. These challenges include acquiring cultural and linguistic capabilities as globalization forces us into a more diverse yet interconnected workforce (Friedman, 2007). Yet, this does not mean that cultural differences are decreasing; in fact it has been noted that “when cultures come into contact they may converge on some aspects, but their idiosyncrasies will likely amplify” (Javidan & House, 2002, p.2).

Functioning in such a world requires organizations to become adept at managing cultural nuances outwardly, in terms of the cultural patterns of potential customers, as well as internally, regarding managing and leading in a multi-cultural workplace (Aycan, 2000). Technology and popular culture may be forces for convergence, yet deep-level cultural differences are not converging (Javidan & House, 2002). Globalization has increased intercultural interactions and the probability that intercultural misunderstandings, tensions, and conflicts will occur. To manage such cultural idiosyncrasies effectively, organizations as well as their individual
employees must gain an intercultural perspective that facilitates an understanding of culturally diverse work values and beliefs. I have seen in my own firm over the past twenty seven years examples of how, if these ‘differences’ are not understood and embraced, they will represent a barrier to the effective transacting of business on a global scale. There continues to be ongoing examples of this dilemma and it speaks to the need to continue to develop Cultural Intelligence in global organizations. Here are five examples of such situations.

**Five scenarios**

I will share five unrelated scenarios that raise key questions as a way to frame my theoretical exploration in this paper. While these are actual events which have occurred in my firm, the names of the subjects have been changed for anonymity. It was these types of events which caused me to become curious and peaked my interest in the area of Cultural Intelligence and its importance in a global business setting.

Scenario one: About ten years ago a team of six bankers visited a high potential, high value commercial client in Hong Kong. The team had prepared lovely binders with their proposals enclosed, all extremely ‘high gloss’ and very professional looking. They also purchased expensive Mont Blanc pens for the client. Upon arrival at the meeting, there were eight representatives for the commercial client sitting along a huge board room table. Our team immediately distributed their packages to each of the eight by almost ceremoniously placing a binder and Mont Blanc pen in front of each of the eight ‘would-be’ clients. The eight gestured for time out and conferred amongst themselves in their native language. After a few minutes of conferring with one another they pushed back their chairs, rose to their feet and asked for an
adjournment of the meeting. Our team was ushered out of the board room and back to their hotel only to find the contracts unopened and the Mont Blanc pens returned. The team of bankers was confused as to what had happened.

Scenario two: Two private bankers were sent to Singapore to meet with a high net worth individual to discuss prospects for doing business. They met at a lovely café and during the conversation our bankers lounged back into their chairs, crossed their legs and ended up revealing the soles of their shoes toward the client’s face. The discussion came to an uncomfortable stall and ended rather awkwardly with the client rising and declaring that they did not see that this partnership was going to work. Our private bankers were at a loss to comprehend what had gone wrong.

Scenario three: Our firm launched an enterprise-wide training course on effective communication skills which had been developed in the United States of America. The program received rave reviews in the US offices and we were encouraged to take it across the organization globally. To our surprise and dismay, it failed miserably in Canada and we could not get people to attend the sessions. After a few classes were run in Canada, enrollment dropped off dramatically and we could not generate sufficient participants to run the program. We were initially at a loss in trying to understand the cause of such a contradictory reaction in the Canadian audiences versus that of the American audiences. We embarked on conducting a costly review of the feedback from the Canadian audiences to try to understand this difference.
Scenario four: Our Canadian head office decided to send a manager whom we will call Charles from Canada down to the Cayman Islands to head up two offices employing about seventy staff. Charles was from West Coast Canada and had lived his entire life in Canada. He was well regarded in Canada and had been seen as a strong manager. This was a bit of a reward for Charles and his family and he enthusiastically welcomed the opportunity. There was not much feedback from these offices in the first three months, but soon after there was a huge drop in morale, disengagement of the staff, and a threat of a ‘walk out’ unless we removed him from a the leadership position. We launched a review to figure out what had happened and how we could fix it.

Scenario five: We were competing heavily for a market share in the banking industry in the southeast region of the United States. We did not realize there were such a high percentage of Hispanic people living as far North as Raleigh and Rocky Mount but nevertheless, we could not seem to make any in-roads into the Hispanic market. Where did Hispanic people bank? We did not realize that traditionally Hispanic people had mistrust for major financial institutions in the United States and that they preferred to deal with smaller institutions who dealt with them on a more personal level.

What knowledge and learning was necessary to make sense of these scenarios? What could we have done differently and how could we have been better prepared for each of these scenarios? I believe that these are snippets of situations where a good dose of Cultural Intelligence was necessary for being more effective action within these situations. I have travelled to over fifty countries and worked in many of them in the past twelve years on five continents and have found
that beyond common sense, beyond intuition, beyond gut feel, there is an intelligence which
seems innate to some which makes them more effective in dealing with cultural differences. I
believe that this intelligence is ‘Cultural Intelligence’.

It is recognizable that all of these scenarios deal with power as a central theme which is
inescapable when one considers the history of colonialization and particularly the once global
dominance of the British Empire. This history has in many ways shaped the interactions among
cultures and in some ways revitalized the nuances of the pre-colonial cultures as a means for
identity preservation in a post colonial world. Hierarchy, cast, class and privilege are all
notions which shape culture, and an awareness of and sensitivity to these elements of culture as
well as global geopolitics all form a part of the construct of Cultural Intelligence.

**Theoretical Exploration: Cultural Intelligence Defined**

What is Cultural Intelligence?

Intelligence represents one of the most elusive constructs in the psychology field. Available
literature reports numerous attempts at defining and measuring the construct, from the
psychometric “g” (Spearman, 1927) to the multifaceted perspective of intelligence offered by
Gardner (1999). The traditional study of intelligence focused on ‘g,’ which was the academic or
cognitive factor or types of intelligence. Howard Gardner became widely recognized as an expert
in the multiple intelligence field of research. According to his multiple intelligences theory
(Gardner, 1993; Sternberg, 1988), emotional, social, and other types of intelligence are possible
(Albrecht, 2005; Goleman, 2005). Decades of research culminated with the categorization of
seven intelligences: linguistic, musical, spatial, logical-mathematical, bodily kinesthetic, and intrapersonal (possessing an effective working model of self, the capacity to understand personal feelings), and interpersonal (capacity to accurately read the feelings and motivations of others) (Gardner, 1999). The most commonly adopted definition and categorization of social intelligence (SI) was offered by Marlowe (1986), who described SI as the ability to understand the feelings, thoughts and behaviours of self and others in interpersonal situations and to act appropriately upon that understanding. The term emotional intelligence (EQ) was introduced in an unpublished paper by Payne (1986); cited by Ashkansy & Daus, (2005) and defined as an ability to perceive, understand, and manage emotion in oneself and others and later made popular by the work of Daniel Goleman (1995).

Later, it was P. Christopher Earley and Soon Ang who introduced the concept of Cultural Intelligence (CQ) to the social sciences and management disciplines in 2003. CQ is an extension of theory associated with contemporary approaches to understanding multiple intelligences. CQ is consistent with this trend and a type of intelligence that is in keeping with contemporary conceptualizations of intelligence, considered as the ability to adapt to one’s cultural or social environment (Gardner, 2003; Sternberg et al., 2000). CQ is defined as an individual’s capability to function effectively in situations characterized by cultural diversity or ‘a person’s ability to adapt effectively to new cultural contexts’. (Earley & Ang 2003). Earley & Mosakowski in 2004 took this further and defined CQ as the ‘seemingly natural ability to interpret someone’s unfamiliar and ambiguous gestures in just the way that person’s compatriots and colleagues would, even to mirror them’, focusing on reflecting the presented culture. In 2005, Thomas & Inkson defined CQ as “being skilled and flexible about understanding a culture, learning
increasingly more about it, and gradually shaping one’s thinking to be more sympathetic to the culture and one’s behaviour to be more fine–tuned and appropriate when interacting with others.” Here we see a focus on developing skills to relate interculturally, adapt culturally, as well as show empathy. Over time we have additional definitions and a refinement of previous definitions. For instance, Brislin et al (2006) defined CQ as “people’s success (of lack thereof) when adjusting to another culture, for example, on overseas business assignment”. In that same year Johnson et al coined CQ as ‘an individual’s effectiveness in drawing upon a set of knowledge skills, and personal attributes in order to work successfully with people from different national cultural backgrounds at home or abroad’, again focusing on the notion of working within foreign cultures. In 2006 Ng & Earley kept it simple by stating it as ‘capability to be effective across cultural settings.’ Thomas in 2006 simply defined CQ as ‘the ability to interact effectively with people who are culturally different’. For the purposes of this paper I am adopting Thomas’ definition.

**Cultural Intelligence as a Multidimensional Construct**

Earley & Ang (2003) built on the growing consensus that intelligence should go beyond mere cognitive abilities and theorized that CQ is a multidimensional concept that includes metacognitive, cognitive, motivational and behavioural dimensions. Sternberg & Detterman’s (1986) CQ multidimensional construct is based on multiple intelligence foci. The four factors of CQ mirror contemporary views of intelligence as a complex, multifactor, individual attribute. Sternberg integrated many views on intelligence to propose four complimentary ways to conceptualize individual-level intelligence: (a) metacognitive intelligence is knowledge and control of cognition (the processes people use to acquire and understand knowledge) ; (b)
cognitive intelligence is individual knowledge and knowledge structures; (c) motivational intelligence focuses on the harnessing of energy and directing it as a beacon of intelligence; and (d) behavioural intelligence focuses on individual capabilities at the action level. Metacognitive CQ reflects the mental capability to acquire and understand cultural knowledge. Cognitive CQ reflects general knowledge and knowledge structures about culture. Motivational CQ reflects individual capability to direct energy toward learning about and functioning in intercultural situations. Behavioural CQ reflects individual capability to exhibit appropriate verbal and nonverbal actions in culturally diverse situations/interactions.

Linn Van Dyne, Soon Ang, & Christopher Koh (2006) went on to develop and validate the Cultural Intelligence Scale (CQS), which measures the four dimensions of CQ using a twenty question self–report and an observer report (questionnaire/assessment) comprised of the same questions. The instructions are to read each statement and select the response that BEST describes you AS YOU REALLY ARE on a scale of 1= strongly agree; 7 = strongly disagree. Sample questions found under the metacognitive section are as follows:

**Metacognitive:**

1. I am conscious of the cultural knowledge I use when interacting with people with different cultural backgrounds.
2. I adjust my cultural knowledge as I interact with people from a culture that is unfamiliar to me.
3. I am conscious of the cultural knowledge I apply to cross-cultural interactions.
4. I check my accuracy of my cultural knowledge as I interact with people from different cultures.
According to their findings, people with strength in metacognitive CQ consciously question their own cultural assumptions, reflect during interactions, and adjust their cultural knowledge when interacting with those from other cultures. They challenge their reliance on culturally bounded thinking and assumptions and are more prone to adapt and revise their strategies so that they are more culturally appropriate and more likely to achieve desired outcomes in cross-cultural encounters. They also tend to be consciously aware of the cultural preferences and norms of different societies prior to and during interactions.

Under the cognitive section the following questions are used.

Cognitive:

1. I know the legal and economic systems of other cultures
2. I know the rules (e.g., vocabulary, grammar) of other cultures' languages.
3. I know the cultural values and religious beliefs of other cultures.
4. I know the marriage systems of other cultures.
5. I know the arts and crafts of other cultures.
6. I know the rules for expressing nonverbal behaviours in other cultures.

Thus, the high cognitive CQ scores reflect knowledge of norms, practices, and conventions in different cultures that has been acquired from education and personal experiences. It refers to an individual’s level of cultural knowledge or knowledge of the cultural environment which includes knowledge of oneself as embedded in the cultural context of the environment. This indicates knowledge of cultural practices (things common to most cultures, such as religion, food, family, etc.) as well as knowledge of cultural differences. Van Dyne et al suggest that the cognitive factor of CQ is a critical component because knowledge about cultural similarities and
differences is the foundation of decision making and performance in cross-cultural situations. This dimension of CQ relates to the work of Geert Hofstede (1991, 2001). Hofstede is a prominent organizational psychologist whose research is based on a large questionnaire survey of IBM employees and managers working in fifty three different countries. In comparing and defining culture he looked at five dimensions of basic cultural values:

1. Power distance or the degree to which members of a society automatically accept a hierarchical or unequal distribution of power in organizations and the society.
2. Uncertainty avoidance or the degree to which members of a given society deal with the uncertainty and risk of everyday life and prefer to work with long-term acquaintances and friends rather than with strangers,
3. Individualism or the degree to which individuals perceive themselves to be separate from a group and free from group pressure to conform.
4. Masculinity or the degree to which a society looks favorably on aggressive and materialistic behaviour.
5. Time horizon (short-term to long term) or the degree to which members of a culture are willing to defer present gratification to achieve long-term goals.

I see a strong relationship between these elements of culture and defining cognitive CQ as it focuses on the very tangible attributes of culture.

The third section of the CQS focuses on motivational CQ and includes the following questions:

Motivational:

1. I enjoy interacting with people from different cultures.
2. I am confident that I can socialize with locals in a culture that is unfamiliar to me.
3. I am sure I can deal with the stresses of adjusting to a culture that is new to me.
4. I enjoy living in cultures that are unfamiliar to me.
5. I am confident that I can get accustomed to the shopping conditions in a different culture.

According to Van Dyne et al, those with high motivational CQ direct attention and energy toward cross-cultural situations based on intrinsic interests and confidence in cross-cultural effectiveness. It is seen as a critical component of CQ as it triggers effort and energy directed toward functioning in novel cultural settings. It is also seen as a critical component because drawing on the expectancy-value framework, motivational CQ is characterized as a special form of self-efficacy and intrinsic motivation in cross-cultural situations. Both self-efficacy and intrinsic motivation play an important role in CQ because successful intercultural interaction requires a basic sense of confidence and interest in novel settings. The fourth and final section concludes with a focus on the behavioural aspects of CQ and includes the following questions:

Behavioural:

1. I change my verbal behaviour (e.g., accent, tone) when a cross-cultural interaction requires it.
2. I use pause and silence differently to suit different cross-cultural situations.
3. I vary the rate of my speaking when a cross-cultural situation requires it.
4. I change my nonverbal behaviour when a cross-cultural situation requires it.
5. I alter my facial expression when a cross-cultural interaction requires it.
High behavioural scores suggest that an individual is able to demonstrate the capability to exhibit appropriate verbal and nonverbal actions when interacting with people from different cultures. Because verbal and nonverbal behaviours are the most salient features of social interactions, behavioural CQ is a very important component of CQ as observers may rely on this component strongly in assessing each other’s CQ. In addition, nonverbal behaviours are especially critical because they function as a ‘silent language’ that conveys meaning in subtle and covert ways. Furthermore, individuals with high behavioural CQ are seen as flexible and can adjust their behaviours to the specifics of each cultural interaction.

Earley & Ang’s (2003) theories posit that four dimensions of CQ are qualitatively different facets in the overall capability to function and manage effectively in culturally diverse settings. Accordingly, they view metacognitive, cognitive, motivational, and behavioural CQ as different types of capabilities that together form the overall CQ construct.

This questionnaire was completed by approximately one hundred and twenty managers in different countries in my organization as a part of a diversity training initiative. The primary purpose was not to support my research project, however, I reference it here as the output from the data served to validate and support my literature review. I will expand further on the results of this under the section on CQ and leadership.

At a very subjective level one can infer that CQ is just about good common sense, personality, individual differences and basic self awareness, and a case of learning strong self awareness and applying that to every encounter. However conceptually anchoring CQ in the intelligence
literature clearly positions it as a set of abilities or capabilities, as opposed to personality or interest. Compared to emotional intelligence, (EQ) focuses on the ability to deal with personal emotions and thus is similar to CQ because it goes beyond innate academic and mental intelligence.

However, EQ differs from CQ because it focuses on the general ability to perceive and manage emotions without consideration of cultural context; including appropriate cultural knowledge, motivation, and behaviour. Given that emotional cues are symbolically constructed and historically transmitted within a culture (Fitch, 1998), the ability to encode or decode emotions in home culture does not automatically transfer to unfamiliar cultures (Earley & Any, 2003). Thus EQ is culture bound, and a person who has high EQ in one cultural context may not be emotionally intelligent in another culture. In contrast, CQ is not necessarily specific to any one particular culture and refers to a general set of capabilities within a specific culture. CQ is a specific, “state like” individual capability that should be related to other forms of intelligence and other indicators of intercultural competence, while remaining conceptually and empirically distinct. CQ should predict performance and adjustment outcomes in multicultural situations. Obviously if cultural distance is perceived to be small (a great amount of cultural homogeneity exists), it is expected that individuals will share more common values and normative behaviours, and hence, CQ will play a less significant role than in situations where cultural distance is perceived to be great.

I would define CQ as that innate sense of knowing and being in a state of sensitivity and awareness beyond self. This entails a recognition that the space around me at all times is
occupied by others who also inhabit this universe and operate out of a set of beliefs and values (their culture) which shape their behaviours and actions which may be similar to or different from mine. This awareness and sensitivity then compels me to be willing to adjust my responses in order to respect and connect with the others around me in the context of their culture as much as possible. In the context of doing business globally then, what implication does this hold?

**Applicability of CQ in International Business**

What is the relevance of Cultural Intelligence in the workplace?

I believe that beyond good common sense and respectfulness, there is a strong business case for organizations to recognize the value of understanding as well as embracing and employing the constructs of CQ in a global firm. In today’s highly competitive business environment, an individual’s success in cross-cultural settings is greatly influenced by his or her capability to manage the challenges associated with living and working in a multicultural environment, such as managing diversity, simultaneously adjusting to multiple cultures, and being conversant in multiple languages (Briscoe & Schuler, 2004). Knowledge of the general dimensions of a foreign culture may provide an individual with some awareness and reduce anxiety, reduce culture shock, and promote appropriate behaviours when living and working in a host culture (Caligiuri & Tarique, 2006). Selmer (2002) & Takeuchi, Tesluk, Yun, & Lepak (2005) found that previous international experience of expatriates had a positive effect on their adjustment level to the host country. Their studies imply that previous international experience can enhance cross-cultural competencies or Cultural Intelligence. The theoretical logic behind their arguments can be found in social learning theory (Bandura, 1977). Bandura’s Social Learning Theory posits that people
learn from one another, via observation, imitation, and modeling. The theory has often been called a bridge between behaviorist and cognitive learning theories because it encompasses attention, memory, and motivation.

Carpenter et al argue that when individuals travel to or study in a foreign culture they learn behaviours, customs, and norms of that culture through direct contact. This broadens their horizons and gives them a wider range and capacity to embrace and process differences in any culture. They develop inimitable knowledge, worldviews, and professional ties that help them to better manage cross-cultural interactions (Carpenter et al., 2001). Their willingness to relocate and interact with host country nationals is enhanced (Brett & Reilly, 1988) and their adjustability to display appropriate behaviours is less mechanical with previous experience. Argumentatively, there are many variables at play which may not necessarily lead to a higher CQ, but it is an attempt in the current literature to assess the relationship between international non-work experiences and CQ.

It is also recognized that ineffective international assignments cause a variety of problems for employees, their families, and companies. At the individual (expatriate) level, poor adjustment may bring loss of managerial self-confidence and psychological stress for expatriates and their families (Mendenhall & Oddou, 1985). This may also affect job performance and career advancement negatively as well as cause wasteful expenditures for companies. Problems with local staff, governments, customers and suppliers in the host country may also be generated. At a practical level, a better understanding of the correlation between CQ and expatriate effectiveness would allow multinational organizations to improve staffing and performance management systems directed at enhancing expatriate adjustment and performance. In the same vein a similar
study was conducted by Tay, Westman & Chia (2008) to examine the relationship between CQ and short-term business travel, defined as travelling for the organization for periods of a week or so while crossing international borders. The study proposed that the higher the CQ of the business traveler, the lower the chances of ‘burnout’, and the higher the perception of control over their travel schedule.

This is of particular interest to me as I travel, on average, each week to a different country to lecture. It is expected that I would be a likely victim of burnout and stress due to scheduling and a sense of loss of control over scheduling. I am often told by many, many of my colleagues that they are amazed at the ability to do the volume of travel that I do and to be able to function within the various cultures as I do on a regular basis. Many have confessed that they cannot do it and will not do it, even those who enjoy leisure travel and infrequent business travel. I have also spoken to many pilots who confess to doing less air miles per year than I do, but who do not have to deal with the settling into a different cultural business context as I do. They just turn around and go back to their home culture and therefore do not experience the same degree of stress and cultural adjustments. The study found that business travelers who are better informed and who have invested in learning about the cultural environment in different travel destinations (i.e., who have greater cognitive and metacognitive CQ) are in a better position to plan and manage the stress that arises from interacting in the different cultural contexts during business travel. Furthermore, business travelers with higher motivational CQ, who are willing to make a greater effort and have the drive to interact with others in different cultures, find the resources to develop contacts and relationships and are able to ease their work stress and stress related to perceived lack of control over travel schedules.
Another antecedent of CQ is one’s ability to acquire language skills, which refers to the extent to which individuals can speak easily and accurately in the language that cross-cultural interactions require. This does not necessarily refer to being able to speak a foreign language only, but also about one’s motivation to communicate with others who speak a different language. For example, my gardener has recently migrated to Canada from Cuba with his English speaking wife and finds it difficult to communicate with most people as his English is very weak. Yet he and I have had all kinds of deep conversations about himself and life where we fill in the spaces for each other in our discussions. He tells me that he was a head mechanical engineer in Cuba and because his English is so poor he cannot find other work in Canada just yet. My family and others are amazed that he and I can have such meaningful exchanges as they find that his English is so poor. Earley (2002) argues that individuals who lack aptitude for acquiring languages at some reasonable level are most likely to have lower CQ. It is commonly held that language conveys many subtleties of culture (Earley, 2002) and reflects its core values, such as norms, conventions, and differences in thought patterns (Nisbett, 2003). Given that language can be seen as a transmitter of cultural knowledge, a study conducted by Lu M. Shannon and Thomas M. Begley (2008) proved that a positive relationship exists between language skills and cognitive and behavioural CQ.

In yet another study Margaret Sheaffer & Gloria Miller considered the implications for and key success factors for living as expatriates (2008). Recognizing that an expatriate assignment can bring extra challenges to the individual and the organization, as well as additional costs when the expatriate attempts to adjust to life and work in a new country and culture, they found that failure
rates and costs are high. The cost of an expatriate in a four-year assignment in a host country can be as high as US $2 million (Klaff, 2002; O’Connor, 2002). The common failure rate (the rate of early return to the home country) of expatriates is up to 40 percent for assignments to developed countries, and 70 percent when the assignment is in an underdeveloped country (Anderson, 2003). In addition to financial costs, there are all kinds of emotional and psychological costs for the failed expatriate and their family as well as career costs for the firm and/or the individual. Utilization of some instrument designed to gauge CQ could help to reduce misplacement of personnel and reduce these costs for both individuals and firms.

Other studies have gone on to make positive connections between: CQ and an individual’s openness to new experiences and adaptive performance (Tania Oalders, Oleksandr S. Chernyshenko, & Stephen Stark 2008); ability to adapt to cross-cultural situations (Colleen Ward & Ronal Fisher 2008); and the ease of developing interpersonal trust when working with multinational teams (Thomas Rockstuhl & Kok-Yee Ng 2008). The commonalities cited in these studies culminate in a recognition that at the individual level, an ability to possess or develop an innate sensitivity awareness beyond self which recognizes that the universe is occupied by others who operate out of a set of beliefs and values, which shape their behaviours (their culture), and which may be similar to or different from mine, are legitimate. A realization that would help corporations and individuals is to recognize that there is not always a natural transition or translation when interacting with others from different cultures and therefore help is required to facilitate establishing a smoother transitioning into a host culture. We cannot make the assumption that this will occur naturally over time, as some corporations do, nor take for granted that there is a natural transition for people. Furthermore, awareness of the contentious nature of
the adaptive process and use of assessment tools will help to reduce the cost associated with failed placements and in fact will increase the speed toward productivity for the foreign worker in the new host country. In Canada, my gardener from Cuba explained to me that he has experienced severe depression and stress and has lost over twenty five pounds in the last few months. He said that he feels alone and out of place. Everything is so different and he misses his family, friends and lifestyle. It is putting a strain on his new marriage and his wife is getting tired of his constant state of depression, reminiscing the good old days in the old country. He feels that he wants to end his marriage and go back to Cuba but he also knows that there are opportunities here for him that he would not have in Cuba. He feels that all he does here now is work and sleep and he does not have a full life. So beyond the hard dollar costs, there are also the emotional and psychological costs associated with integration into a foreign culture. This awareness and sensitivity then compels individuals to be willing to adjust responses in order to respect and connect with others in the context of their culture as much as possible.

Analysis of the Literature: Applying Cultural Intelligence to Global Business

What role if any does Cultural Intelligence play in the effectiveness of the design and delivery of learning solutions in a global firm?

Design of Learning Programs

Six years ago we developed a program called Managerial Excellence; an initiative to create a cultural shift in how we manage people in the organization. This was a perfect example of a revived version of human capital theory, where managers are now called leaders and coaches and there is competitive advantage to be gained from a skilled and committed workforce. The intent was to equip managers to drive employee engagement and thus, productivity. It was built in
Canada with full support of the organizational leadership and became the largest roll-out of a learning program across the enterprise globally. The strategy was clearly a push strategy, where learning was developed and pushed out to the regions, and while it worked in Canada, it failed miserably in the international audiences because it was exported “as is”. There was no recognition for local cultures, particularly around learning, and no tailoring done to reflect the nuances of the various locations. The organization lost a tremendous amount of money because of this lack of “Cultural Intelligence” in attempting to bring learning to their global locations.

Upon later reflection we recognized that we did not include any representation from the global businesses when doing the needs analysis; the assumption made was that they were simply a microcosm of Canada and the needs should be the same. The design and development team made the same assumptions and did not validate any of the content in other global contexts. For instance, they used generic role plays, scenarios, video clips, on-line interactive sessions and language in all of the English language materials, but it was a rendition of “Canadian speak”. The curriculum was comprised of 5 modules, each consisting of a blended learning approach of six weeks of self-directed work, culminating in a one day facilitated class. There were specific learning plans itemizing how one would progress through the six weeks of self study including virtual group work, online interactive pieces, peer to peer discussions, and managers’ discussions. We found that most of this did not resonate in the global audiences; in fact they thought that we had “lost it” to expect that they would embrace such a process. I was told by managers that the intent of the design was to shift the learning culture toward embracing this type of approach to learning, and bring more alignment among global practices. Our focus was on “culture as sameness” hoping that this “training will have an assimilatory or cloning function”
(Nicky Solomon in Boud & Garrick 1999). We did not consider the need “to serve the different learning styles and needs, the different cultural orientations, and the different aspirations toward work and living [and learning] represented by the diverse population” (Barbules 1997; 98 by Nicky Solomon in Boud & Garrick 1999). The delivery was another nightmare as all of the facilitators were Canadian and brought a very Canadian lens to the classroom. They did not have cultural sensitivity and intelligence to tailor the delivery “at the point of delivery” to meet the needs of various audiences. They used hockey analogies rather than draw on the social realities of the learning cultures locally for understanding. Finally they did not do a thorough evaluation, as the program had to be pulled pre-maturely from the international audiences. The level one feedback (Donald Kirkpatrick Four Levels of Evaluation 2007) and the anecdotal feedback was enough to tell us that this was not working. I will provide an overview of each of our major geographies and how the local prevailing social culture impacts the corporate culture and thus learning embedded in that culture. However, I will digress for a moment to explain our training goals.

The Role of Educators in Mediating Cultural Intelligence

Managers in a post-industrial global economy must learn primarily, not new skills, but new roles Hirschhorn, L., Gilmore, T., & Newell, T. (1989). Current training seems to be based on the rigid separation of the training encounter from the natural world of work. In understanding the psychodynamics of learning, trainers can help adult learners learn new roles and develop new relationships, not just new skills, in the context of the culture in which they live and operate. Learners face anxieties in taking on new roles in the post-industrial global world and often training is seen by the company, trainers and learners as the defense against this anxiety. Yet,
trainers need to become better designers and understand the difference between the training “encounter” and “learning moments” in the social culture they may be training in. If they are unable to do this, training becomes irrelevant.

Trainers also need to recognize that in order for the training to “take” or “stick”, the authority system in the learner’s culture also needs to be a part of the training process itself. To learn how to take on these new roles in new ways, people need to become aware of their defensive routines which they use, that limit their abilities to collaborate with others and distort relationships (Wilson 2005). When examining these failed relationships in training sessions, learners frequently feel vulnerable and anxious. Despite their anxiety, they will embrace the learning only if they feel they can develop a trusting relationship with the trainer. In order to trust, learners need a “transitional object” equivalent to how a child carries a teddy bear to camp. The teddy bear allows them to move from dependency to independence (Wenger 1998).

Various techniques can serve as transitional objects which the trainer may employ such as small talk, humor, giving away information about themselves, showing humility, showing modesty, showing vulnerability, showing assertiveness and confidence, expounding on their knowledge of the content, showcasing their academic qualifications, etc. This builds a working alliance between the learner and the trainer and eventually the learner becomes less dependent on the trainer. When this relationship is not present, the learning can feel punished and distort the potential for learning. It can also serve to alienate the trainer from the learners. If the relationship and trust is built, the learners are initially dependent on the trainer, but will move to seeing the trainer as someone who is not just there to give them the answers, but someone to help them
interpret their experiences. This transitional relationship, the in-between zone through which the trainer passes from the teacher role to the collaborator role, can often substitute for the “transitional object” (Wilson 2005). But this is subject to the culture in which the learner was raised and is operating in at the time of the training.

Trainers need to work at achieving this relationship by developing their own Emotional Intelligence (Goleman 1995) as well as their Cultural Intelligence. This relationship development between trainer and learner depends on two processes. First, the trainer must be able to empathize with the learner’s difficulties as they face their own defensive routines, and learners must feel the trainer’s empathy. In other words, trainers must understand the realities of the learner’s world and demonstrate that. Second, learners must identify with the trainer’s observing and interpreting stance so that they can use their own ‘observing ego’ to overcome their feelings of vulnerability (Hall, 2006). This relationship can fail if the trainer cannot contain their anxiety, empathize with their learners, accept their initial resistance (and sometimes hostility) and help interpret their experiences. Moreover, even if the trainer takes on this complex role successfully, some learners may nonetheless be unable to accept the trainer’s empathy and discover their own observing ego. They may simply be too un-teachable or anxious for even the most experienced trainer.

It is important for trainers to overcome their own traditions of teaching, and take on new roles as consultants to the learning process, and designers of learning encounters. They must resist the temptation to please. Many trainers are seduced by the image of the charismatic trainer standing in front or centre of the classroom, controlling the talk and “the learning” of those they teach.
The historic compelling image of the “expert” who dominates their learners and who is expected by their learners to act in this way, distorts the trainer’s understanding of their own role dilemmas. This feeds the training tradition of the rigid separation between the artificial training encounter and the experiences in the natural and social world (Welton, 2005).

While educators might hope that training would ultimately prove unnecessary, that people could learn from their own experiences with relevant others as their relationships unfold, and that working and learning would be seamlessly integrated, this is as difficult as the search for the perfect trainer who can contain all the possible anxieties of a training encounter. Training encounters will always be needed despite the artificial learning setting. To bring it alive and close to people’s experiences is most effective for imagining the new roles they must take on in a post-industrial global economy. They also need to learn to stand in the boundary between the training encounter and the natural world to make meaning of training and help the learner transfer the learning to the world of work (Welton, 2005). We need to exchange resources, ideas and energy between those two worlds. In this way, as adult educators, we can help people become resources for one another as they work to overcome their shared anxieties and really learn. To take on new roles, trainers should first confront their practices, give up control, and begin to learn. To be good at training, one must be first good at learning, including learning other cultures and nuances (Guile & Young, 1998).

I subscribe to the early research of Angela V. Paccione (2000) in which she looked at what constitutes a multicultural person. The context for her research centered on multicultural education and she proposed that before one could become a multicultural teacher, they first had
to be a multicultural person. Eleven themes emerged from her research that are strong indicators of what leads to someone developing a higher CQ disposition. The eleven themes include: (1) influence of family/early childhood experiences which encouraged an affinity towards diverse groups; (2) influence of a mentor, role model, friendship from diverse groups; (3) influence of training, educational courses and books; (4) interactive/extended cultural immersion experience with another culture; (5) influence of critical incident(s)/significant event(s) described as life changing or perspective changing; (6) significant temporal environments such as the civil rights era; (7) motivation from empathy, moral disposition, religious/spiritual upbringing/influence/convictions; (8) discrimination/racism due to minority status or feeling of being lesser worth; (9) initiative from a job situation which includes being exposed to inequities by taking a job as a social worker for example; (10) heightened awareness of issues related to diversity such as issues of social injustice including power and privilege; and finally (11) personal power, which describes high self efficacy and actions taken in response to perceived injustices.

These eleven themes are important dimensions to consider in learning and developing CQ. Personally, I can identify all eleven themes in my background and feel that they contributed significantly to my CQ. While not everyone will naturally have the benefit of these eleven themes in their life’s experience, they can choose to avail themselves of certain ones to increase their CQ. Furthermore in the same vein, I believe that one can develop a commitment to cultural diversity through the same or similar four stage process described by Paccione, presented as (stage 1) contextual awareness, (stage 2) emergent awareness, (stage 3) transformational awareness, and (stage 4) committed action.
Organizational Learning in a Global Culture: A Description and Analysis of My Employer

The question this awareness begs is, can producing learning programs and content from a centralized function in a single geography (Toronto, Canada) effectively meet the learning needs of a global organization? Can we hope to understand and tailor an “enterprise learning approach” for the many foreign cultures in a global organization that originates in a Canadian model of a learning organization? I propose that unless one has an in-depth understanding of the “cultural nuances” of the various audiences, an enterprise approach to learning from a Canadian perspective will fail.

I wish to now return to a critical look at my organization’s attempt to provide a universal learning solution at a global level and how the local prevailing “learning sub-cultures” in the various foreign jurisdictions have impacted organizational learning. I will highlight how the local prevailing social culture impacts the corporate culture in a few of the major geographies the firm operates in. I have worked for the organization internationally for the past twenty seven years and in global training and development for the past 7 years. What I am sharing here is based on first hand experiences and interactions I have had in working and living in these global cultures. I acknowledge that one cannot pigeon hole an entire group descriptively, given that in any population there will be substantial diversity. However for the purpose of describing learning cultures, I am drawing on general descriptors of the majority.
A Descriptive Look at the Enterprise

My firm’s culture can best be described as “Canadian paternalism” with a strong emphasis on “humanistic values” and “communal consensus building”. We promote strong “teamwork” and “collaboration” and use the term “empowerment” in our description of employee engagement. We espouse competitive pay, top percentile benefits, an enabling work environment and a strong learning culture. This is important but it does not always apply outside the Canadian reality for a number of reasons. Each of our international locations has its own office sub-culture strongly influenced by the local prevailing social culture. This diversity makes sense because that is the social context in which the employees come to work from each day and go home to at night. Some of them are still dealing with the remnants of imperialism and colonialization while others are more bullish, individualistic, and confrontational. The international audiences are an important segment to the firm as approximately twenty-five percent of our employee base is outside of Canada and about forty two percent of our revenue is generated by the non-Canadian offices.

The Canadian Learning Culture

In Canada, the learning culture is well established. The firm allocates budgets for the learning spending per capita. Each employee is given the time and resources necessary to develop and serve the organization’s needs and a learning plan is established online for most roles. The learning afforded is “tailored to the needs of the industry, the organization, the
division and the individuals who work in this organizational culture” as Marsick & Watkins (Chapter 13, Boud & Garrick, 1999) puts it. The population (for the most part) embraces learning opportunities (on the job training, mentoring, formal learning, informal learning, accredited learning, mandatory and regulatory learning) as an expected benefit and they expect a demonstration of interest in their personal development by the firm. In many ways our firm sounds like a “cuddly vision of community and collegiality, a workplace where trust, sharing, reflective practice and empowerment flourish” (Fenwick 1998). One can suggest then that organizational learning is greatly encouraged and we do have the makings of a learning organization.

Argumentatively however, this is “learning for economy” where the individual does gain residual benefits as well in terms of “individual market value”. So while it would be laughable to describe the environment as “a place where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to act together” (Senge 1991), I would say that the employee does experience a certain degree of “controlled agency” when it comes to personal development. The employee can also embrace “learning for life” or lifelong learning as a part of the prevailing learning culture in the organization. In our various global locations, the learning culture is not as well established and mature, and this approach certainly does not work.

**The Global Learning Experiment: On the Ground Insights into Enterprise Learning**

What role does Cultural Intelligence play in the effectiveness of the design and delivery of learning solutions in a global firm?
About eight years ago we centralized the learning function in Canada (Toronto), employing 68 people to look after the learning needs of the organization. We threw a drag-net over the entire enterprise pulling in all of the learning and development activities across the globe with the promise of efficiencies of scope and scale and creating a centre of expertise. We departmentalized by function along the learning food chain; needs analysis, design and development, delivery and evaluations along with a technology assistance group and an administrative support group. The promise attached to all of this was economic; we would reduce the spending on a fragmented learning approach from twenty-seven million to a single centrally managed budget of twenty million in the first two years and yet not compromise learning. This gave us the engine to build massive programs and roll them out enmass in the form of a push strategy. In Canada, this worked well as people could attend various classes and see a curriculum unfold in a way that justified the learning spending. Scorecards were instituted by businesses to track the number of learners attending programs and this was celebrated as evidence of success. The mass production and commoditization of learning worked in Canada, given the degree of homogeneity in the business, the population, the maturity of the learning culture, and the proximity to the learners.

In revisiting the five opening scenarios in light of the research it is clear that we needed to have done things differently not just from a learning perspective but from a leadership one as well. In scenario one, we learned that in doing business in that culture, one does not place a contract in front of their potential business partners at first point of meeting face to face. Instead that contract should have been sent to the potential clients ahead of the meeting to be vetted by the company’s lawyers, accountants, senior management and elders before the meeting. We learned
that the meeting should focus on getting to know the people and building trust rather than contracting immediately. It was seen as trying to either “pull the wool” over their eyes by pressuring them to sign a contract or simply arrogance on our part, neither of which was appealing to the clients.

In scenario number two we found out that it is disrespectful to show the soles of your feet/shoes to those who are of equal or superior status. In this case we lost the deal as well because it was felt that we were not approaching the relationship as equal partners but putting them in subordination. This was not the type of relationship the clients wanted to have with their private banker; they wanted an equal partnership.

In the case of scenario three, we found out that people were discouraging others in the Canadian audiences from attending the training, discounting it as ‘too American’. Apparently the tone of the language used, the examples presented and the scenarios painted were seen as too aggressive, individualistic, and forward. This was seen as ‘not fitting’ within a Canadian context and people could not relate to the training.

In scenario four we learned that Charles struggled to build trust with the locals but his approach to doing business was very ‘North American’ and there were too many cultural idiosyncrasies that he did not understand nor embrace. While he related well with other expats, this actually worked against him and widened the ‘us versus them’ divide. In many ways this mentality dates back to colonialization and is reminiscent of the days of the ‘white man rule’ in the colonies. To make things even worse, he was replacing a local manager who was considered as the unofficial
mayor in the community. Charles was unaware of “the ambiguities and contradictions in attitudes and alliances, and the class structures within class structures” (Spivak, 1988) which prevailed in the island. Charles did not understand that trust in such communities is deeply seated in relationship and is displayed by having the people’s best interests at heart. Instead Charles came across as the traditional colonial master with good intentions, but was not able to relate at the level of the people and build relationships with them. While only scenario three speaks to training specifically, all of these examples do speak to our inability as an organization to reflect a knowledge of the culture we were working with. Likewise in our centralized training example, we got caught up in the excitement of the opportunity to create this centralized programming. We failed to recognize the strong sub-cultures of the international locations and how this may have impacted our business strategy in general and our learning strategy in particular. I will highlight three geographic regions here as examples.

**The United States of America**

In the fifth scenario which I shared earlier, we were competing heavily for a market share in the banking industry in the southeast region of the United States. We did not realize there was such a high percentage of Hispanic people living as far North as Raleigh and Rocky Mount but nevertheless, we could not seem to make any in-roads into the Hispanic market. Where did Hispanic people bank? We did not realize that traditionally Hispanic people had mistrust for major financial institutions in the United States and that they preferred to deal with smaller institutions who dealt with them on a more personal level.

We have forty-five hundred employees dispersed over seventeen states with the highest concentration in the southeast states - the Carolinas. The great majorities of the employees in the
USA have been acquired as a result of mergers and acquisitions (M&A) and continue to operate in their physical and geographic space with only a new logo on the store front. As a result, the existence of office sub-cultures are strong and the employee experiences little evidence of a broader overarching culture or of a sense of belonging to a large Canadian firm, which could be considered negative for business. The American way of doing things is to “biggie size” everything, so there was little resistance to a mass rollout of enterprise learning, but it had to be the American way and it had to be controlled locally. They wanted the high gloss, high touch approach as long as they could control it locally. However, they did not have the member population to justify such an investment locally. They claimed that our “language of learning” was too passive and congenial and therefore our case studies, examples and “approach to coaching and leadership” needed to be rewritten in a “more American” language.

Given how geographically dispersed the population was, it would be very costly and difficult to address the needs for a diverse population, especially when considering organizational function and a multitude of topics and approaches. The use of technology in learning and the completion of pre-work were things we took for granted in Canada but were almost non-existent in this population. We considered that it allowed us to utilize a combination of learning mediums (classroom, self-study, online, and satellite learning) in the form of a blended approach to learning. However, this population saw a learning opportunity as an opportunity to travel, meet others in the firm, and spend up to 3 days at a time in resorts and hotels eating well and golfing in the evenings. Furthermore, any reference to Canada and Canadian values in training served to alienate the participants. They passively resisted our centralized approach by continuing to build
locally and employing local external vendors to meet their needs. In effect we were duplicating
the spending, as they continued to operate a “secret parallel” learning function locally.

Finally in scenario number five, we decided to consult with the brand and marketing group to
figure out a strategy, took some good advice from them, and found success. We hired a number
of Spanish speaking trainees and trained them to be branch managers. They were integrated into
the local community by coaching soccer, living within the community of potential clients,
attending local church and sending their kids to the same schools. We installed Automated
Banking Machines which did transactions in both English and Spanish. Our entire loan, credit
cards and account documentation was printed in both English and Spanish. Within six months in
some geographic areas, we saw a net increase in business of about ten percent. We learned that
to be successful in a foreign culture, one must reflect and adapt to the norms and practices which
build trust and respect from the local constituents (Fenwick, et al, 2001).

The Caribbean

We currently employ over sixteen hundred people in the region dispersed over eight countries
largely in the Eastern Caribbean. There is a strong post-colonial mentality which prevails in the
region with subservience to a “master day” rule, notoriously pronounced as “masser day” by the
local peoples. What this means is that people will do only what they are told to do, nothing more,
nothing less. The show of initiative is not rewarded, but punished as it is seen as over-stepping
their “place”. We have replicated this by sending male white colonial masters down as expats to
head up the operations and “keep the natives in line.” In Caribbean culture, children are taught to
be seen and not heard and therefore as adults they enter the workforce with underdeveloped
communication skills and a lack of confidence in expressing themselves. The schooling system is
still based on the traditional approach of unquestionable obedience to those in authority and does not really prepare them for participating in a self-directed, individualistic society. While academia is highly prized, learning remains at the level of memory recall in order to acquire accreditation, and not necessarily at the applied or critical thinking level. The tentacles of “liberal reformism” in the schooling system during the 1960s and 1970s have not quite reached this part of the world just yet. So participants show up in an adult learning environment still expecting the “teacher” to have all of the power, all of the answers, and to “fill their heads” with all of the right information. This approach may have served the economy of old and helped to maintain power in the hands of a few, denying “cultural capital growth” in the masses (Fenwick 2001). But foreign companies today are looking for self-directed, participative employees committed to raising their personal human capital. The notion of co-creating learning as a participative activity and not having absolute answers is foreign to this participant base. There is a great divide between “what schools teach and what employers want” (Erwin & MacLennan, 1994).

In this context, participants will bring every possible “what if” scenario to the session and hope to have a pat answer from the instructor to take back and use. If the instructor attempts to provide a process which can be interpreted in various ways relative to the situation, that is disappointing as it is “not the answer” they were looking for. From the reviewed literature, a pedagogical approach with high energy activities to draw learning from participants as opposed to a more theoretical approach would likely work best (Lowe, 2000). Participants fear being “wrong” and are unwilling to risk, so they tend not to do pre-work and speak up in sessions. They prefer the comfort and safety of a small group where they cannot be singled out (Fenwick, 1998). The use of technology is still on a very steep acceptance curve and its use in learning is even steeper.
This context is a strong culture of entitlement based on tenure. When locals are promoted into lower level supervisory positions, they carry out the deeds of their masters with a vengeance in order to secure their position. They are often seen as tougher managers and they replicate a culture of “us and them”, the divide between “management” and “staff”.

The average tenure is about 28 years as people join the firm and stay for life. This means that is difficult to introduce change and new thinking too rapidly and that new employees have to earn their stripes through the ranks to be respected. Change is expelled from the system like a virus. Regarding training sessions, I have heard people say that all you need to do is to “dumb it down one or two (academic and theoretical) notches, have good food and make it fun, and they will love it”. While English is the spoken language, there is a very strong local slang and unique expressions which are not reflected in our Canadian materials, which presents a road block to interpretation. Case studies, role plays, coaching scenarios all need to be localized to reflect the language of the learners (Boud & Garrick 1999). Often attending training is seen as a reward and therefore it is not the people with the greatest skill gap who get sent to training, but those who are most deserving of a reward. The participants seem to be able to build trust and connect more easily if the presenter is seen as “one of them” who can understand their culture and language and not another “master” telling them how to “be”. It is also interesting to note that each one of islands have their own sub-culture which also influences learning. For example in the Cayman Islands, there is a large percentage of the work population which is ex-pat from the UK and the USA, which reflects the “American way” and the “British way” in terms of learning and culture. My classes are usually divided along the lines of expats as well as local whites and local others. Each group relates to the facilitator and the content differently.
In the Bahamas, the majority of the workforce is female, except for management. Academic training is questionable in that the average grade in the high schools is a “D”. The minority who have better grades are privately schooled and are probably sent to the USA to obtain a degree. In spite of a degree from the USA, their return to the culture has an endemic effect which causes them to go native once again and regress to the nuances of the culture, the work ethic and dominant thinking. In any event, often they epitomize the findings of Wotherspoon (1998) “that there has never been a strict correspondence between formal education and work training {readiness}”. They enter the workforce needing as much training as anyone else.

Barbados on the other hand is a very educated workforce; with a strong British influence given that they were the one island which remained a British colony until independence, as opposed to many of the other islands who changed hands among the British, Spanish, Dutch, French and Portuguese. They are a proud people with a strong sense of being Barbadian (“Bagian”) and look to learning as an “emancipative equalizer” or a “survival strategy” (Fenwick, 1998). They believe that “education is the key that unlocks economic opportunities” (Lowe, 2000). While they too enjoy some light-hearted fun in the classroom and a display of “local awareness” by the presenter, they do not shy away from an academic debate especially if there is a vein of ‘human rights” attached to it. They too do not do a lot of pre-work, but they compensate for it in the classroom by their active participation.

In the Eastern Caribbean region, the issues are similar to Barbados but the differences centre on less academic sophistication and a melting pot of cultures among the islands. They represent
French, Dutch, Spanish and British heritages and bring some the idiosyncrasies of each heritage with them. They are happy to make training a mini-getaway, and take the approach of keeping it simple, making it fun, and bringing food. Overall, one of the overarching challenges with the Caribbean region is that employees see working for the firm “as a job for life” (Lowe, 2000), and we are trying to shift them to recognizing that “continuing employment will depend on continuing value and contribution to the organization” (Lowe, 2000), which in our understanding means continuous learning.

The United Kingdom

We also operate in the British Isles, London, Edinburgh and Dublin, employing about three thousand people in this area. The average learner shows up with a degree of sophistication, arrogance, command of the language, and “need for speed”. There is little time for “ice breakers” and the niceties of getting to know each other in the session. They like to “cut to the chase”. They are looking for “just in time” learning and are happy with just “espresso shots”. They do not have the time for lengthy sessions, pre-work, and a lot of fun and games. Food is not a necessity. Anything that adds time to the session without a wow factor is not a good use of time. The mindset around corporate learning is that it is for those who have a “skill or behavioural gap”. No one wants to be seen as having a gap and therefore attendance at training sessions is very challenging to achieve. Often people will only attend if the training is made mandatory.

In this context, we need to recognize that one can mandate attendance but one cannot mandate learning (Senge, 1991). Reflective discourse is not well entrenched in the culture and there tends to be an extremely critical view of the hidden intents behind corporate learning. They tend to see learning as purely for the organization’s benefit and should be done on the company’s time.
They do not “bleed blue” for the firm and are not easily encultured to wear the company’s logo. They hold the view that they own the language and therefore command it at a superior level. Any training offered has to be in the British version of English, as any other version is an insult to their intelligence and is easily discounted. I remember one participant expressing “you Canadians think you speak English but you don’t”. Another gentleman could not get past the fact that we had used a comma in the wrong place in the materials.

They prefer 2-3 hour sessions at a maximum and enjoy being asked to critique a case study or a video presentation as opposed to being the subject of the critique. They prefer to tell you how others have done it wrong and how others need to do it better. Asking them to think about and critique their own approach and behaviours is very risky. They perceive doing a role play and then engaging in reflective debrief as too gimmicky and inappropriate for a proper corporate environment. They love good whit and banter and are happy to engage in this, sometimes at an inappropriate level that does not respect diversity issues.

The workforce is extremely gendered as is communication. and the majority of the discussion is lead by men. There is a sense that our Canadian language is too “feminized” and politically correct, not reflecting their reality. The “place” of women in their society is still on a steep evolution from “basic misogyny” to “acceptance as equal”, and this is reflected in the power structures and how women participate in learning. Women do not occupy many of the senior management positions and are “signed up and sent” to training to make up the numbers when the men cannot leave their desks.
The centralized approach of one size should fit all, clearly fails and I remember being on a post
session review call with the design team in Toronto and was mortified when one of the senior
designers stated with defiance that we will not accommodate each group’s idiosyncrasies by
tailoring case studies, exercises and language to their liking. This for me was a fundamental issue
revealing a lack of Cultural Intelligence that has been consistently woven into learning design.

Applied Analysis and Recommendations from the Literature

There is a financial cost to ignoring the reality of difference among a global audience of learners.
That cost can be in the millions of dollars in terms of the development and redevelopment of
materials. Once our failures were clear in each case, our postmortem began with a number of
questions, questions that perhaps should have been asked at the outset of the project. Questions
are firm needs to ask itself are: What should we be cognizant of when seeking to deliver learning
solutions to a global audience? What should we do differently to ensure that the voice of the
foreign learner is heard in all of the stages of the learning food chain - needs analysis, design,
development, delivery and evaluation? How do we build a core curriculum with central messages
that are aligned to the organization’s vision, values and espoused culture, while at the same time
respecting the local idiosyncrasies of our foreign audiences? How do we reflect their “language”
in our materials, case studies, scenarios, and role plays or lack thereof, video clips etc. while not
compromising the spirit and intent of the messaging? How do we understand and reflect their
appetite regarding use of technology in learning, pre-work, self study and length of sessions?
How do we understand and reflect the issues around gender and power in learning and the
cultural readiness to move along the continuum of awareness on these issues? How do we
understand and reflect learner motivation in the foreign offices, their reason for attending
learning opportunities, and their expectations of learning? How do we reflect CQ in our design and delivery of learning in a global firm? As I reflect on my own experiences in working with learning and leadership globally, and having conducted an extensive survey of the literature, I would propose the following recommendations.

**Recommendation One: Cultural Brokering**

Through these experiences and failures, the organization gained a renewed understanding and focus on delivering appropriate learning to our global audiences with recognition of the impact of global cultures on organizational learning. According to Matthews & Candy in Boud & Garrick (1999, p.60) “it is important to see individuals [learners] within their social and cultural contexts”. It is arrogant to think that we in Canada can control learning for all of our global employees without doing due diligence in engaging their perspectives throughout the planning and learning process. Cultural nuances in the “local learning culture” need to taken into consideration in tailoring to each audience. The hope would be to see a greater uptake on learning opportunities resulting in greater organizational alignment and employee engagement in these foreign audiences.

The single most important learning is that centralized learning can only effectively meet the learning needs of a global organization if Cultural Intelligence is engaged. It requires us to approach the learner not as a generic category, but as individuals in a social context that includes the geographic and cultural reality the learner exists in. We learned that we must develop competence in our designers and facilitators to become cultural brokers (Gay, 1993). We failed to recognize that “people learn diversely and indelibly through their experiences of work and [the
culture of their workplaces” Catherine Casey in Boud & Garrick (1999, p.15). We failed to recognize that “learning is considered to be part of a cultural practice” and we need to move away from an assumption of “a workplace culture that promotes sameness” toward an engagement with cultural understanding (Nicky Solomon in Boud & Garrick (1999, p.122, 130). We came to appreciate the difference between running a centralized learning function and striving against the perception of “global domination” across the organization. In reality the problem is complex because “a diverse world coexists simultaneously with an organizational logic that presumes and assumes a universal character, one, however, that can only find its specific forms in the institutional and cultural contexts of every day local reality” (Tsoukas & Knudsen, 2005, 2000).

We had built an enterprise program to fit a monocultural norm and had rendered invisible the differences of learners and had not culturally-framed learning in our various global locations (Solomon in Fenwick, et al, 2001). How could we have hoped to have “touched the consciousness of the people” with a Canadian program “that gave them no voice” in its design and delivery (Spivak, 1988). Going forward we agreed to be more sensitized to these truths and ensure that we engage local representation on all projects who can help us to better situate the learning within the local prevailing culture. We also agreed to set up a process to manage the needs assessment up front so it is a combination of the needs brought in from the local geographies combined with the strategic direction of the firm together feeding the creation of a learning strategy for the organization. Some parts of this strategy will be non-negotiable for the entire enterprise such as compliance and regulatory training, and other parts will be more
localized depending on the need. This would result in greater buy-in from the various
geographies and a willingness to partner with head office.

**Recommendation Two: Cultural Intelligence (CQ) and Leadership**

What role if any does Cultural Intelligence play in leadership effectiveness in a global firm?
It is clear that there is no shortage of literature on the topic of leadership; however my focus here
is to look at the relationship between leadership effectiveness and Cultural Intelligence.
Managing a large modern organization requires leadership that not only understands the
technical dimensions of executing business strategies but also has an acute understanding of
international business and culture. As a result, traditional models of strategic leadership,
historically focused on the technical capabilities of executives, have become inadequate. Instead,
new models are needed that more fully embrace the capabilities of executives for global
leadership which consider how cultural intelligence can be integrated into executive leadership
(Mannor, 2007).

It is also clear that modern organizations require global leaders, who are seen as culturally
sensitive and possess executive intelligence (Menkes 2005). Executive intelligence is defined by
Menkes as a distinct set of aptitudes that an individual must be able to demonstrate in three
central contexts of work: the accomplishment of tasks, working with and through other people,
and judging oneself and adjusting one’s behaviour accordingly. This calls for a high degree of
self awareness and self regulation or emotional intelligence (EI) (Goleman 1995), as well as
sensitivity to working with differences in people (CQ). This cultural sensitivity is also important
as it positions the leader as a cross-cultural leader and opens the door for trust from coworkers
and employees in the host country. Leaders attempting to get work done through others within a foreign culture must be alert to possible nuances in culture and must be willing to acquire knowledge about local customs, language business practices, and norms. Such sensitivity requires the ability to understand the perspectives of those living in different societies and the willingness to put oneself in another shoes. In fact, understanding and the acceptance of other cultures can give leaders an advantage in successfully competing in global markets and avoiding pitfalls. Behavioural complexity is a term I would use to describe what global leaders need to develop in becoming a culturally sensitive and multicultural leader. This calls for diversity management skills and adaptability as well as innovation in leading and managing a globally diverse workforce (Johnson, Lenartowicz & Apud, 2006).

Michael Mannor (2007) in *Handbook of Cultural Intelligence* goes on to describe several intersections of Cultural Intelligence and Strategic Leadership Theory. His research found that executive CQ is positively related to (1) breath of the information-scanning behaviours of top executives in culturally diverse settings, (2) the selection of more direct and proximal sources of information in culturally diverse settings, (3) the quality of information top executives are able to gather when making decisions in culturally diverse contexts, (4) The quality of investment decisions made in culturally diverse contexts and (5) overall ratings of managerial performance in global firms.

His research also confirmed that executives with higher CQ will provide larger equity stakes to foreign partners in culturally diverse contexts and will engage in alliances with strategically valuable foreign partners that are more distant as compared to other executives in culturally
diverse contexts. I therefore argue for a positive relationship between global leadership effectiveness and high Cultural Intelligence.

**Assessment Tools for Cultural Intelligence**

The Cultural Intelligence Scale (CQS) self report referred to earlier was completed by approximately one hundred and twenty managers in different countries in my organization. What became evident was that those who described themselves as fairly compatible with cultural difference and adaptable to different environments scored higher on all four sections as compared to others who did not necessarily see themselves as culturally diverse or open to new and different cultures. Additionally, by cross-referencing the results from this questionnaire with a 360 degree instrument built to measure leadership and management effectiveness called the Management Review Profile (MRP), we found that those who were described as being more effective managers and leaders also scored higher on the CQS.

A logical but not scientifically proven conclusion from these assessment tools is that leaders with higher CQ are perceived to be more effective leaders overall. While leadership effectiveness is a broad topic that cannot be addressed here, our 360 degree instrument has defined leadership effectiveness as the leader’s ability to (1) build and strengthen relationships with employees globally, (2) lead and advocate change in diverse situations and cultures globally and (3) build and lead high performing multicultural global teams.

Let us return to scenario number four at the beginning of this paper and consider the implications and cost of Charles’ inability to translate leadership in a different cultural context. What could
have been done to assist him in working more effectively with the team? What assumptions did we make? Perhaps a closer look at his existing Cultural Intelligence and preparing him for the transition into a leadership role in a new and different culture would have produced different results. There are many different intercultural instruments available, which in retrospect, we could have unutilized to better prepare Charles for this assignment. Paige’s (2004) comprehensive review of intercultural instruments identifies several tools that can be used to assess and prepare leaders for foreign assignments: Cross-Cultural Adaptability Inventory (CCAI) (Kelley & Meyers, 1995); Cross-Cultural World Mindedness (CCWM) (Der-Karabetian, 1992); Cultural Shock Inventory (CSI) (Reddin, 1994); Culture-General Assimilator (CGA) (Cushner & Brislin, 1996); Global Awareness Profile Test (GAPT) (Corbitt, 1998); Intercultural Development Inventory (IDI) (Hammer & Bennett, 1998); Intercultural Sensitivity Inventory (ISI) (Bhawuk & Brislin, 1992); Multicultural Awareness- Knowledge Skills Survey (MAKSS) (D’Andrea, Daniels, & Heck, 1991); Overseas Assignment Inventory (OSI) (Tucker, 1999); and Sociocultural Adaptation Scale (SAS) (Ward & Kennedy, 1999). I would recommend using the CSI and the CCAI as both include personality characteristics, attitudes, and values, in addition to cross-cultural capabilities like openness to new experiences. I would therefore recommend applying testing and cultural assessment as a pre-requisite for international assignments to determine strengths and areas for development. In conjunction with that I would recommend training to augment these assessments to help prepare potential candidates for foreign assignments.
Recommendation Three: Intercultural Training

In a recent case in point, a gentleman whom I will call John is a highly successful manager in our retail division, and he has been offered the opportunity to transfer to the Beijing office. He has been very successful in Canada and has led many new business initiatives and large teams. He was highly recommended for the role and knows that is not healthy for his career to turn down these opportunities. He is anxious and nervous that he does not speak the language, does not understand the culture or how business is conducted in the culture. He has convinced himself that it cannot be that difficult after all he has heard of many others who have done it. His wife is excited about the opportunity and wants to be supportive but is also concerned that she will need to leave her job and find work there too. They are both concerned about their three children ages three, seven and nine who will need to be schooled, make new friends and fit in. They convinced themselves that they have moved once before, from east coast Canada to Toronto, so how difficult can this be?

They made the move and the first eight months have passed slowly for them. Jon is now worried as he is finding it difficult to adjust to the work culture and given the lack of communication he feels in the office. He and his wife do not like the food and are finding it difficult to find food they know and like. They are not comfortable with the public transportation and do not want to put their kids into an international school where they would need to deal with many other languages and cultures. His wife decided to stay at home and home school the kids giving up her career. Their social life has ground to a halt and they have not made friends, either local or other expatriates. They are both frustrated at the situation and just want to go home to Canada. John is concerned that asking to end the assignment will be seen as a sign of failure and a career-stalling
move. His leadership performance is beginning to become questionable since we have not seen the progress we were hoping to see thus far and he does not seem to have any impact at all on the team in Beijing. Furthermore and even more worrying is the news that he is demonstrating stress-related behaviours and exhibits outbursts in the office, which is extremely out of character and thus, he is compromising his leadership position. In fact many of the senior management team both in Canada and in China were beginning to shake their heads in disappointment, commenting that he had come so highly recommended. If he stays he is also concerned that his lack of performance in Beijing due to his lack of motivation and dissatisfaction can also hurt his future, as much is riding on his placement there. They both feel stuck!

This represents the classic stages of culture shock. According to Ward, Bochner & Furnham (2001) 'culture shock' is used to describe the emotional rollercoaster that someone experiences when living in a new country. Dealing with it helps minimize the risk of becoming disillusioned with a new country and the possibility of deciding that a quick return 'home' is the only solution. Experts agree that culture shock has stages and all agree that once people get beyond the initial and most difficult stages, life in a new country becomes a lot better.

Outlined below is an example of the stages people go through with culture shock:

Stage 1 - Excitement

The individual experiences a holiday or 'honeymoon' period with their new surroundings. They feel very positive about the culture, are overwhelmed with impressions, find the new culture exotic, are fascinated and are passive; meaning they have little experience of the culture.
Stage 2 - Withdrawal

The individual now has some more face to face experience of the culture and starts to find things different, strange and frustrating. They find the behaviour of the people unusual and unpredictable, begin to dislike the culture and react negatively to the behaviour, feel anxious, and start to withdraw, begin to criticize, mock or show animosity to the people.

Stage 3 - Adjustment

The individual now has a routine, feels more settled and is more confident in dealing with the new culture. They understand and accept the behaviour of the people, feel less isolated, and regains their sense of humour.

Stage 4 - Enthusiasm

The individual now feels 'at home'. They enjoy being in the culture, function well in the culture, prefer certain cultural traits of the new culture rather than their own and adopt certain behaviours from the new culture.

Clearly John and his family never got beyond stage 2. Cultural ineptness may be visible at all levels including in non-leadership roles, but it is amplified at the leadership level as leaders tend to be more visible and impact a greater scope of people. What could we do differently to help John and his family succeed? The immigration, integration and assimilation literature offers some ideas on the process which we could have made available to Charles and his family. For example we could have considered options such as pre-service visits, literature on the local norms and culture, initial language lessons, providing connections to other expatriates prior to
arrival as well as to other parents with school age children. We should have also talked about having them attend classes in the foreign culture and language (Wilkes, Guppy & Farris 2007).

They had completed the Cultural Intelligence Scale (CQS) before going out to Beijing and found their scores to be low in all four areas particularly low in the areas of metacognitive and motivational CQ. In spite of this the firm felt that we needed John out there. Both John and his wife had never really experienced working in a different culture and in fact had not travelled much to gain any international exposure. International work experiences allow individuals to obtain knowledge, skills, and behaviours that are essential for living and working in different cultural environments (Gudykunst & Ting-Toomey, 1998), as well as increased adaptability and flexibility in volatile environments (Sambharya, 1996). This couple also had limited diversity in their social circle and contacts, only spoke English and were never really interested in learning a foreign language; not even French their home country’s second official language. They had never really had to change their behaviours or actions to interact with others before moving to China and found that they did not hold any natural curiosity towards other cultures prior to moving to China. We discussed their lack of curiosity towards foreign cultures as well as what success looks like in a leadership position in the global offices. They concluded that they were not the best fit for such roles. While it was a difficult conclusion for John and his family, I supported them in it as clearly they had been through such a tough adjustment that they were not willing to invest any further effort and were prepared to quit if they were asked to. All they wanted at this stage was to come home. I asked them what they thought we could have done differently and they said that they felt very unprepared, but they did not know this until they actually got there and the ‘vacation’ period was coming to an end. They felt that if we had
provided them with some intercultural training and awareness of the stages of culture shock they would have been better prepared and the shock would have been less and easier to manage. They felt that this would perhaps have encouraged them and motivated them to embrace new ways of being. I feel that we as a company failed to recognize that cultural intelligence is not always a natural disposition for everyone. However I believe it can be developed with deliberate and intentional actions, experiences, and training, all of which John and his family were not privileged to.

John and his wife were relieved when they were told they were going home in spite of concerns about what awaited then back in the home country. In some ways they were saying we “tried to tell you but you did not listen”. Assimilation and or integration requires work on the part of the foreigner and as well as the society embracing them. Both need to be aware and educated on the plight of the foreigner and how to make this a successful process (Brubaker, 2001). They either refused to or did not have the capacity to embrace the transformative opportunity presented here even as I had to when I migrated to Canada several years ago. While we used the CQS with John and his family, we did not pay attention to its results. My recommendation is that we proactively set up a standard process which prepares any employee for a foreign assignment and which focuses on intercultural training.

Discussion, future direction and conclusions

As a learning leader, when examining each of the five opening scenarios after they had become problematic, several learnings are clear. There were clear actions we could have taken to avoid or mitigate some of the issues. We could have done our home work and been more prepared
through intercultural training and awareness in understanding how to do business in Hong Kong, Singapore and the Hispanic South East of the United States of America. In scenario number three, we could have taken the time to connect with the local learning professionals to understand the needs from their perspectives and seek to reflect the idiosyncrasies of their local social and learning culture in our approach to designing and developing the learning. In scenario number four we clearly failed to prepare and Charles for his foreign assignment as we did John in the later example.

In considering the plight of Charles and John, it is important for corporate global businesses to establish a formal pre-reporting process for all expats, leaders and non-leaders alike. This should include a formal assessment using the CQS, and at least one or two other assessments focused on assessing personality characteristics, attitudes, and values, in addition to cross-cultural capabilities like openness to new experiences. In addition the pre-reporting process should include extensive interviews, exposure visits, basic language training as well as intercultural training. We have now established a formal step by step on-boarding process in the host country and a detailed checklist including establishing contacts and networks prior to moving. We also established formal and informal training curriculums to support expats including topics such as culture, norms, work ethics, geography, social taboos, food, local shops and restaurants, driving and parking to name a few. Finally we provided a list of contacts including doctors, lawyers, hospitals, schools and other important services.

In drawing on the available research and my own experiences in the role of global consultant, I have defined the concept of Cultural Intelligence and its relevance in the global workplace. I
provided extensive discussion and arguments to make the case for the role of Cultural Intelligence in the effective design and delivery of learning solutions in a global firm. I also presented the business case for Cultural Intelligence in leadership effectiveness in a global firm. In addition it is clear that if the incumbent is willing and prepared to be open to new ways of being that Cultural Intelligence can be developed in the individual (Paccione 1998).

The research in the area of CQ is still evolving and it sets the stage for further empirical studies to be carried out to better understand ways to identify measure and develop CQ. For example, it would be interesting for future research to conduct a study to measure the exact or potential correlation between the CQ and Leadership beyond simply confirming a positive relationship between the two. Also further studies can be conducted to examine CQ as a predictor guiding the selection of individuals into global leader positions (Lievens et al., 2003; Spreitzer et al., 1997), to assist in intercultural training (Paige, 2004; Yamazaki & Kayes, 2004) and inform cross-cultural negotiation effectiveness (Gelfand et al., 2001).

In this paper, I have already considered the potentially positive relationship between CQ and the other intelligences; social and emotional as well as Cultural Intelligence. In sum, CQ can be learned through international non-work exposure, expatriate adaptation and effectiveness, short-term business travel, language skills, openness to new experiences, job performance, adaptability to cross-cultural situations, and ease of developing trust in working with multinational teams. Further research findings might offer business leaders additional employee selection and training strategies, and thereby improve assessment of cross-border business opportunities and employee success ratio factors. The argument is therefore that CQ is an important factor in driving expatriate adjustment and effectiveness because individuals with a high level of CQ can more
easily adapt to new cultural contexts and more easily navigate and understand unfamiliar cultures (Ang et al., 2007).

Allow me to conclude with a personal reflection on a small part of my journey in developing my own Cultural Intelligence. I did not know this at the time but as I reflect on the details, I experienced all of the elements of classic culture shock, right through to stage four and beyond. This also speaks to the post colonial experience of my journey of personal emancipation in the context of a new and foreign culture. As Bhabha (1994) puts it “learning to work with the contradictory strains of languages lived, and language learned has the potential for a remarkable critical and creative impulse”. It was in part the journey of V.S. Naipaul in his fictional accounts of A House for Mr. Biswas and The Mimic Men which I studied in high school that aroused my curiosity about identity. Like V.S. Naipaul retracing his journey from his India to the Caribbean and the intercept in London, I too found my self discovery in my journey from my Indo-Caribbean world of Trinidad to Canada. I call it the story of the ‘Canadianized Caribbean Man’.

It was very interesting and confusing for me to note that in my native Caribbean culture, notably a West Indian background, emphasis was not placed on communication as an academic skill to be developed. Yet we all realized that our very lives revolve around communication, particularly in the day to day transactions among people, as the essence of our culture, and how the richness of our culture is expressed through our language.

We are a very proud people, with a strong sense of identity and an indigenous culture forged out of the battles for emancipation from colonialization. We are a very ‘slang’ oriented people,
which evolves from a desire to express our intensity and own the language that came from “the masser’s”. This slang is arguably the result of the colonial experience and the definition of it as slang is a British construction itself. We tend to gesticulate, using more areas of our body sometimes than we are aware of. We curl our language, singsong our sentences and use volume to emphasize meaning. We say ‘let’s make a lime by D beeche’ to mean let’s go hang out at the beach. We say ‘doh make joke’ or ‘yuh makin joke’ to mean you’re kidding. We say ‘we going to get on wassi tonite’ to mean we are going to have a wild party time. We say ‘take it easy man’ to mean talk to you later. Our communication portrays this identity of a Caribbean person.

Imagine this Caribbean man migrating to Canada in the early 1980s. He is surrounded by a sea of new waves - tall buildings, fast cars, extensive highways, advanced technology, lighter skinned people, many different peoples, strange accents and faster paced life. He has to adapt, survive, and communicate. He has to say ‘hi’ instead of ‘what’s the beat man’. He learns to ‘party’ instead of ‘going to a fete’, from the Creole French colonization. He has dinner at supper time and wears suits to work every day not just on special occasions.

He does not understand the culture, the values, and the standards are higher he feels. He undergoes culture shock. He feels inadequate; he becomes withdrawn, and shy. This was manifested by stumbling on the escalators and not knowing what is a ‘bagel with Swiss’. His language sounds strange to him; as he notices his complexion, he withdraws further. He is clumsy on the subway and awkward on the office phone, slowly becoming introverted. His self acceptance and self esteem drops. Eventually, his self image shatters as he becomes confused. His free area shrinks and his hidden area enlarges (Johari window, Luft & Ingham 1955). He
protects his privacy and his disclosure remains at the surface. He is afraid to tell who he really is because if he does, he may be ridiculed, not accepted and therefore, not belong. Months pass by and he decides to learn from what he sees around him. He decides to embrace the culture while not losing his own identity. He decides to become a part of the mosaic. He observes well, researches well, reads well and questions well. He devotes his energy and concentration and begins to understand the workings of this new place.

Eventually he is accepted; he belongs. He learns the language well enough to match wits and offer good humor. He has friends and now belongs to a social group. He embraces his new culture which has opened up a world of new experiences for him. He speaks the language, drinks the light beer, and enjoys hockey. He is now a Canadianized Caribbean man with the opportunity to assist others in a similar transformative journey.

Embracing the spirit of the Chameleon represents the ability to assimilate without surrendering identity, to flex and fit in and even reflect the local social prevailing culture without losing one’s original self, to adjust and make others welcomed and comfortable while experiencing a new way of being (Brubaker, 2001). To be culturally intelligent requires embracing the spirit of the chameleon.
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