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**IDENTIFYING THE BARRIERS AND CHALLENGES TO THE EFFECTIVENESS OF
GLOBAL TALENT MANAGEMENT**

A Thesis in
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by
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ABSTRACT

The purpose of this study is to identify the barriers and challenges to the effectiveness of global talent management. Global talent management is important to study because multinational companies must be aware of the effective measures needed to sustain a strong talent pipeline. At the global level, managing the performance of individuals is not an easy task to complete, but the human resource department is able to accomplish this through various roles and methods. This research specifically identifies the four levels of challenges to effectiveness involving the individual, human resources, line manager, and overall talent management system. The study is based on twenty-five interview transcripts from three organizations: one professional services firm based in the United States (sixteen interviews), one bank based in the United Kingdom (seven interviews), and one bank based in the United States (two interviews). The results show that within the four levels, re-entry, transparency, expatriate expectations, benchmarks, long term strategy, and line manager capability were common challenges voiced by the interviewees in the three organizations.

Keywords: Performance management, talent management, effectiveness, expatriation, global talent management

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Chapter 1

Introduction

With increasing globalization in recent years, there has been a greater amount of pressure put on multinational corporations to create a competitive advantage (Dowling et al., 1994). There are more than 100,000 multinational corporations and nearly 900,000 foreign affiliates or subsidiaries that account for approximately 25% of the gross domestic product around the globe (UNCTAD, 2011a, 2011b). As the need for globalization has increased in pace and intensity, organizations have had to develop more effective talent management systems that span subsidiaries, transnational units, and international bodies. While companies begin to adopt some of the same practices and systems, the people and the quality of their talent management become the differentiating factor. But how effective are the talent management tools and processes being implemented?

Managing talent in a global sense becomes a difficult task when the shortage of talent is higher or the potential is not discovered in time. In order for an organization to be successful, a small number of high-potential individuals must be identified because these are the individuals who are able to add value through their competencies when they transition into key strategic roles (McDonnell, Lamare, Gunnigle, & Lavelle, 2010). Retention then becomes an issue because companies have long tenured top talent, which tends to diminish once an expatriate assignment is complete. If performance is not valued or is overlooked, firms are not able to accurately predict the success or potential of their employees. The biggest challenge of all is that every organization is in competition to find individuals who can adapt to an ever-changing economy and overall global environment (Tarique & Schuler, 2010). For this reason, human resources (HR) must work

to identify the best ways to effectively manage top talent globally. The influence that HR provides along with other levels of a business may be overlooked even though the way people are managed matters just as much as the revenue they produce for the organization.

The following study will begin by looking at literature that exists on global talent management. Three levels have been identified which correspond with the levels expected in the qualitative analysis. These levels include the individual, HR and talent management systems which will be analyzed to express the challenges in the effectiveness of talent management. Specifically, expatriate talent management will be assessed through interviews conducted in three organizations. The study will then conclude by discussing the limitations that emerged and future research.

Chapter 2

Literature Review

Performance management managing and developing people in a way that enables shared objectives to be achieved (Armstrong & Baron, 2000). In other words, the goals and efforts made by employees must align with the goals and needs of the business. When everyone is working towards a common goal, both the organization and individual will benefit. Specifically, a company's HR practices must develop an employee's skills, knowledge, and motivation so that employees behave in ways that contribute to the implementation of a particular business strategy (Bowen & Ostroff, 2004). This study explores the challenges in the effectiveness of different levels in managing talent globally.

Talent Management

Assessing talent management is often referred to as a phenomenon because there is no singular theory that can accurately depict its cause-and-effect relationship (Dries, 2013). For the purpose of this study, talent management is defined as the systematic identification of the key positions held by employees that contribute to an organization's sustainable competitive advantage (Collings & Mellahi, 2009). The end goal of most organizations is to transfer skills into the highest possible economic value so that their business is more desirable than a competitor's. Based on definitions in the HR literature, talent can be operationalized as *human capital*, or the stock of competencies, knowledge, social and personality attributes that aid in the ability to perform labor that will lead to economic value (Farndale, Scullion, and Sparrow, 2010).

Human capital can be measured at the individual performance level by linking the value of talent with the company's goals.

When we think of effectiveness, we should consider how successful something is in producing a result. Specifically for this research, effectiveness refers to how successful organizations are in managing a strong talent pipeline. Effectively managing talent decreases the time spent hiring replacements for leaders and specialists in an organization (Bethke-Langenegger, Mahler, and Staffelbach, 2011). It is more beneficial for organizations to manage and develop the talent already acquired so that additional costs are not made on recruiting talent outside of the company. But who is held responsible for the success or failure of a strong talent pipeline in an organization? Typically, the blame falls on HR (Becker & Gerhart, 1996). This study argues that challenges to effective talent management occur more than just at the HR level.

Stewart (1997) developed a model of talent (Figure 1) in which the value of talent was determined by the difficulty of replacing that talent. The highly specialized skills obtained by individuals that were difficult to replace were placed in the upper right hand quadrant while lower quadrants illustrated the talent pools with no unique value and talent that was easily replaced. This strategy can be effective to use because it analyzes the association that value has with the individual's uniqueness. The more difficult it is to replicate an individual's talent, the more favorable their skill becomes. Top talent is therefore categorized by the difficulty in replacing skills and the value those skills bring to an organization.

Collings and Mellahi (2009) describe an effective talent management strategy as activities and processes that involve the systematic identification of key positions in an organization that contribute to its sustainable competitive advantage, the development of a talent pool of high potential/performing employees to fill these roles, and the development of a human resource division that can facilitate filling these roles. This strategy best aligns with the goal of this study because there is no singular process that is deemed as contributing solely to talent

management. As a phenomenon, talent management cannot be obtained from a single source or single approach, which is why it should be analyzed from different perspectives. In this study, the main objective will be regarding the individual effectiveness of talent, HR's level of effectiveness, and lastly the effectiveness of talent management systems overall.

Figure 1: Talent classified by difficulty-to-replace and value.

Difficulty to replace	Difficult to replace Low value added	Difficult to replace High value added
	Easy to replace Low value added	Easy to replace High value added
	Value added	

Individual Effectiveness of Talent Management

Although an employee's performance can be measured through past trends, potential is also important for predicting an employee's future in the organization. Talent management can be viewed as an approach taken by HR and the business to achieve organizational effectiveness by improving the performance and potential of people (Ashton, & Morton, 2005). By combining the performance and potential of people, the business can determine what an employee has accomplished, as well as what an employee is capable of doing. The ultimate goal should be to place employees in positions where they will succeed and bring in maximum capital for the organization.

Similar to Stewart's (1997) model, from a capital perspective, employees are categorized into two dimensions known as value and uniqueness (Dries, 2013). Value is described as the

potential of the human capital to contribute to its organization's core competence and enhance its competitive advantage. Uniqueness refers to the difficulty in replacing the organization's human capital compared to being readily available in the labor market and copied by competitors (Dries, 2013). For an organization to stand out from the rest, this perspective promotes the idea of employees possessing both value and uniqueness. The more an employee is able to contribute to the bottom line with skills that are irreplaceable, the more important these individuals are in the talent management process.

Individual Performance of Expatriates

In terms of individual effectiveness, a top performer must be aware of their value and what uniqueness they bring to an organization. Organizations like to send their "high potential" employees on extended overseas assignments to help gain an overall perspective of how the business operates globally (Oddou, 1991). Expatriate talent management is a difficult task when considering the technical knowledge needed, personal adjustment to the foreign culture, and environmental factors such as the labor market (Cascio, 2006; Oddou and Mendenhall, 2000). When individuals are asked to go on international assignment opportunities, companies agree to invest time and money on a high performer as long as the level of talent is justified. When there is a lack of availability of management and technical skills in some countries, organizations employ expatriates to fill these gaps (Brewster & Scullion, 1997).

Expatriates are the primary focus of individual effectiveness because these employees are sent overseas to complete assignments for multinational corporations. These individuals are chosen to represent the organization in a new location to share the knowledge and skills required to fill a gap. When expatriates fill a global assignment, adjustments must not only be made in

their new role, but also to a new culture (Mendenhall & Oddou, 1985). Assimilating to a new culture is not an easy adjustment to make, which can create challenges for an individual.

Training programs are also necessary for the adjustment process which has been shown to have positive value for the expatriates (Brewster and Pickard, 1994). When training is received for an assignment, expatriates appreciate the time taken to prepare them for their new role. Research has shown, however, that the main concerns influencing the success of an expatriate include the environment, job requirements, and personality characteristics of the individual (Schuler et al., 1991). While training programs may assist in the adjustment of an expatriate, challenges are still prevalent during the assignment period.

HR's Effectiveness of Talent Management

Moving forward into effectiveness at the HR level, Ulrich (1997) writes “you cannot manage what you cannot measure.” Linking HR to business results should be simple as long as HR practices correlate with higher business results. In order to gain a significant competitive advantage, performance must be improved continuously by reducing costs, innovating products and processes, and improving quality, productivity, and speed to market (Becker & Gerhart, 1996). Becker & Gerhart (1996) acknowledge that HR's effectiveness must either focus on improving efficiency or contributing to revenue growth if they want to have an influence in organizational performance. Throughout its existence, HR has always been viewed as a cost center because it does not directly generate revenue. For this reason, the focus of HR must shift towards improving efficiency and innovation in organizational performance. The challenge, however, lies in improving efficiency while minimizing cost yet maintaining investments that will lead to future talent capabilities required for the organization to succeed.

The main objective of most organizations in any given industry is to maximize profit and do so in the cheapest way possible. A reduction in employees can be viewed as the solution to minimizing costs, but does reducing staff always help to add value to the firm's strategy? No, not necessarily (Cascio, 2009, SHRM). Fewer workers do not equal more efficiency. Reducing the number of employees may lower costs, but may not lead to a maximization of profits (Pfeffer, 1998). Becker and Gerhart (1996) describe human resources as moving towards a focus in value creation within the company. This new strategic approach draws from various areas such as psychology, economics, finance, and strategy. With a number of different areas to draw from, HR can move away from its traditional organizational role and move towards becoming a strategic partner within the firm (Becker & Gerhart, 1996). Once HR learns to generate value that is unique to the organization, a partnership with HR and strategy can form.

The term human resource accounting (HRA) has been used in previous studies to define the identification, accumulation and dissemination of information about human resources in dollar terms (Woodruff, 1973). Woodruff (1973) describes HRA as an information subsystem that communicates changes in investments made in HR. These investments include efforts made in recruiting people, the onboarding process, and the costs of training among other things. Essentially, HRA is used to report to operating managers on how effective some HR practices are in dollar amounts. Although this is not an easy task to accomplish, measuring the effectiveness results in being able to calculate the return on investment (ROI) for every HR practice or program (Phillips, Stone, & Phillips, 2001). Ultimately, this calculation aims to determine which practices are beneficial for the firm and which are costly (Pease, Byerly, & Fitz-enz, 2012).

In contrast, there have also been critiques presented between the relationship of HR and the effectiveness of performance. Collings et al. (2007) considers the changing attitudes towards careers in the international context. The article describes changing attitudes as affecting the willingness to both accept an assignment and the return after an assignment is completed.

Individuals do not look at their current positions as positions they want to stay in for the long term, but rather consider the short term. According to the most recent available data from the Bureau of Labor Statistics, the average worker today stays at a job for approximately 4.4 years (<http://www.bls.gov/>). People are growing accustomed to working a certain number of years in one company, then moving on to bigger or better opportunities. Instead of having an organizational focus, employees are now leaning towards self-interest and finding ways to maximize their own values and aspirations. Additionally, organizations are also aware of the need to constantly reform and restructure their businesses in order to remain competitive. The alignment of business with strategy from a global perspective is the key to obtaining the overall goal of competitive advantage.

For the purpose of this study, HR effectiveness in relation to expatriate management is an important connection to make because HR is typically held responsible for the selection and management of top performers who pursue global experiences (Oddou, 1991). HR is responsible for managing the expectations generated by expatriates who are unclear with what adjustments need to be made. Even though the selection of expatriates involves business need and management input, the training and preparation for an assignment are key resources identified for a successful assignment (Oddou, 1991). In some organizations, a specific global or international mobility function is used to help manage the process involved in a global assignment. The function is primarily in charge of the coordination and control of individual business functions across borders (Kim, Park, & Prescott, 2003). The support received or perceived by an expatriate plays a role in how effective talent management is from both the HR and individual levels.

Effectiveness of Global Talent Management

The effectiveness of global talent management (GTM) is the main topic of interest when we consider the challenges presented to multinational corporations. Global talent management is about “systematically utilizing international Human Resource Management activities to attract, develop, and retain individuals with high levels of human capital consistent with the strategic directions of the multinational enterprise in a dynamic, highly competitive, and global environment” (Tarique & Schuler, 2010). The main difference between GTM and HR management in this study is that GTM is a process involving more than just the HR function; the effectiveness includes the expatriate on the receiving end, and the systems necessary to identify the talent. Implementing GTM strategies is challenging for multinational corporations because it is so dynamic. Individuals are sent on international assignments as representatives of the firm’s top talented employees. On the opposite end, re-entering into the home environment office after an international assignment is complete is referred to as repatriation (Scullion and Brewster, 2001). Incorporating both terms is important in the cycle of GTM because expatriates are only successful to the firm once they are able to transfer back valuable knowledge, skills and leadership.

In one study, six principles of the effectiveness of GTM have been identified: alignment with strategy, internal consistency, cultural embeddedness, management involvement, balance of global and local needs, and employer branding through differentiation (Stahl et al., 2012). With the first principle, alignment with talent and strategy is necessary to determine what type of talent is needed. Each company is unique in the sense that what strategies may work for one firm may not work for another depending on company needs. Globally, pipelines must be reviewed in order to attract, recruit, develop and deploy the right people to impact whatever the company need may be.

Alignment with the business strategy is achieved by assessing an individual's current performance and their predicted capabilities (Heinen & O'Neill, 2004). As the business grows, so must an employee's talent in order to be successful. Development through experience and learning is a constant element necessary for growth and improvement. While some skills may be needed to land the job, other skills are learned over time. When talent-development initiatives begin to adapt to where the business is heading, success is achieved by both the organization and employee (Heinen & O'Neill, 2004). With the continued growth in technology as well as emerging markets, fostering talent is just as important to align with the business strategy.

In its third principle, Stahl et al. (2012) uses the term cultural embeddedness to describe the integration of company core values into talent management processes such as hiring methods, leadership development activities, and compensation and benefits programs. When employees are hired with values similar to the organization, this is often referred to as person-organization fit. Person-organization fit is the idea of hiring for organizational compatibility as seen through a fit between an individual's personality, beliefs and values and the organizations expressed culture, norms and values (Morley, 2007). While skills and experience are necessary to land you the interview, companies often evaluate organizational fit to ensure that individuals will want to stay once they have been selected. The attitudes and values of an individual are ultimately what differentiates a potential candidate from a new hire. Even if the skill level or experience is not quite where they need to be, organizations are willing to train those with less skill and greater cultural fit.

Does having a strong company culture help to sustain financial performance? Barney (1986) define organizational culture as a complex set of values, beliefs, assumptions, and symbols that define the way in which a firm conducts its business. Organizational culture holds an economic value that can result in a competitive advantage if it is rare and imperfectly imitable (Barney, 1986). Cultures that have shown a positive economic impact have the ability to enable

firms to do and be things for employees, customers, and suppliers (Deal & Kennedy, 1982). It is important for the culture to be unique and rare so that the culture is not replicated. Even in multiple locations around the world, established organizations hold a strong culture across the firm. Once an employee sets foot into any of the firms, there should be no difference in values or in the overall goal of the business.

Management involvement is essential for the effectiveness of GTM because managing talent cannot solely be looked at as a human resource priority. Management must be willing to devote a significant amount of time to the talent practices (Stahl et al., 2012). Management involvement is challenging because some senior leaders in organizations may not recognize the importance or their role in talent. Some firms, however, have found a way to incorporate career development into business strategy. These companies realize that sustained competitive advantage comes from talent management practices (Heinen & O'Neill, 2004). Managers carry more influence than they realize, especially when it comes to career development. If an employee is excelling in their role day by day, managers can get involved by offering suggestions on what new opportunities are available and more challenging.

Multinational organizations attempt to maximize their abilities through global integration yet still be able to provide local responsiveness to respond to individual needs (Caligiuri & Stroh, 1995). Ideally companies may want to maintain congruence in all locations, but the business must develop practices that meet the needs of more than just the home country. Companies aim to centralize their practices across the global firm, yet recognize that some local practices may apply. One of the more prevalent challenges in centralizing practices is seen in the talent management systems used by global organizations.

Talent management systems, when effectively implemented, should enable the promotion of talent from around the global network to take key positions within companies (Mellahi & Collings, 2010). Even though talent can be identified at multiple levels of an organization, what

differentiates global top talent is their ability to fill a skills gap in any region. A *Harvard Business Review* article refers to this key talent as “A players” (Huselid et al., 2005). The article argues that building bench strength for every key position is essential for future business needs. Investing in feeder jobs for key positions allows organizations to realize who is ready for a new role now and who still needs some time before taking on more responsibility.

Balancing the global and local needs is challenging because organizations are moving towards global integration, yet still feel the pressure to adapt to local levels. When considering the effectiveness to GTM, these pressures must be realized because of their effect on talent management systems used (Mellahi & Collings, 2010). Ideally, companies would like to operate the same way in every location, but employees are sometimes brought into a completely different environment. The mission and objectives of the firm may remain the same, but culture at the local level makes a big difference.

The effectiveness to GTM focuses on expatriate management because individuals classified as expatriates typically possess unique and valuable skills that are needed to fulfill a skill gap within the organization. Through talent management systems, HR determines which top talented employees are sent on global assignments. If systems are ineffective in identifying top talent, time and money is then wasted while business needs are left unresolved. In order to avoid sending employees with low potential, the link between talent management systems and expatriate management is an important connection to establish. With the mentality of maximizing profit and minimizing cost, effective systems are just as important as HR identifying talent and expatriates completing a global assignment.

Research Question

The research question explored in this study is what are the barriers and challenges to the effectiveness of global talent management. Three levels have been distinguished based on the literature: individual, HR, and talent management systems. Each level has been associated with a certain set of challenges that hinder the success of international assignments. The findings expected differ from previous studies because the challenges to effective global talent management are expected from three distinct levels. At the individual level, expatriates have difficulty with adjusting to a new environment. At the HR level, challenge is presented with long term strategies and creating a quantifiable amount to the value of performance. Overall talent management systems face obstacles when determining bench strength in the organization. Since talent management is a phenomenon, the implementation and success cannot be said to end and begin with HR alone. The challenges serve as recognition that changes are needed at every level of an organization in order to effectively manage global talent. The purpose of this study is to address this gap in the literature.

Chapter 3

Methodology

For the purpose of this study, qualitative primary data was obtained and analyzed by the researcher. All three sets of data consisted of 25 overall interviews that were conducted in person, over the phone, or via Skype with one professional services organization and two banks. The first set of primary data analyzed consists of sixteen interviews that were obtained by the researcher's thesis advisor, who conducted a study in 2011 pertaining to organizational goals in global talent management. The second set of primary data consisting of seven interviews was also obtained by the researcher's advisor, who focused on the global financial crisis and the role of the corporate HR function. The third primary data set consisting of two interviewees were recruited using convenience sampling and transcribed by the researcher in 2015 to support the findings from the other two primary data sets. All interviews lasted anywhere from thirty minutes to two hours and were analyzed using two sets of interview questions- one set for the professional services organization and the second for the two banks. The three organizations serve as support that barriers and challenges exist in the effectiveness of global talent management.

All interviews were previously recorded, except for one of the interviews collected, where the researcher obtained detailed notes before immediately typing out the responses. After receiving and creating the transcripts, the researcher read and analyzed the interviews to find key issues relating to the challenges that each level faces to the effectiveness of global talent management. Challenges were originally identified in one spreadsheet which focused on three overarching codes: the line manager, decentralization, and expectations. These three codes emerged to the researcher to broadly identify and reflect every interview that mentioned

something pertaining to these topics. An iterative process was used where the cycle of analyzing the transcripts was repeated in order to highlight more specific themes. As line manager, decentralization and expectations were too general to accurately find similarities between transcripts, these themes were recoded to recognize more specific challenges such as the line manager's capability, the line manager's willingness to let go of top talent, benchmark issues, localization, culture, transparency, HRIS systems, business and HR alignment, business need, repatriation, returning from an assignment and problems with long term strategy.

Once the challenges were broken down, the researcher decided to split these barriers by level involved in the effectiveness of global talent management. Some of the codes were grouped together based on similarities such as repatriation and returning from an assignment (re-entry), as well as localization and culture (regional). Thus, four separate tables were created to represent the various levels involved in the talent management process, with distinct quotes of challenges that pertain to their level of effectiveness. Originally, three levels were expected, but through the iterative process, the line manager level emerged as a key challenge in all three organizations. The other levels include individual, HR, and talent management system. After identifying the key themes for each level, the researcher reviewed the 25 transcripts once again to pull out specific quotes that would add support to each underlying theme. In total, the transcripts were analyzed and coded three times before ending with desired results. The tables are presented below.

Table 1 illustrates the profiles of interviewees who had something to say relating to the individual level effectiveness. Seven out of nine of the individuals were expatriates currently on an assignment. Three expatriates were based in India, but within different divisions; one based in Argentina; two based in China, but in different locations and within different divisions; and one expatriate based in the United States. Of the nine individuals, only two had positions in the firm for less than five years, while the others had over seven years of experience with the firm. The

quotes serve as evidence to support what makes talent management effective from the expatriate lens. The challenges experienced by the nine individuals are introduced later in the findings.

Table 1. Individual Level Profiles.

Organization	Code	Host Country	Home Country	Division	Position	Yrs. At Firm
Professional Services	PS-3	US	Chile	Global Mobility Advisor	Expat	7
Professional Services	PS-4	US	US		GML	13
Professional Services	PS-6	US	US		GML	8
Professional Services	PS-11	Shanghai	US	Global IFRS & Offerings Services	Expat-Partner	8
Professional Services	PS-12	Argentina	US	Field Partner	Expat-Partner	13
Professional Services	PS-13	Beijing	US	Global Oil & Gas	Expat-Partner	5
Professional Services	PS-14	India	US	Analytic & Forensic Technology	Expat-Senior Manager	4.5
Professional Services	PS-15	India	US	Internal Communications	Expat-Director	14
Professional Services	PS-16	India	US	Strategy	Expat	13

Table 2 demonstrates the profiles of interviewees who had comments made about the HR level of effectiveness. Three of the interviewees are repeated from the individual level profile

(PS-3, PS-4, PS-6) because these individuals also had remarks to make about the HR level. Seven of the interviewees were Global Mobility Leaders (GML) from the professional services organization, three worked in Corporate HR (CHR) and two worked within the HR department from Bank 2. All interviewees were based in the United States, and ten out of twelve interviewees have more than seven years of experience working at their perspective organization.

Table 2. HR Level Profiles.

Organization	Code	Country	Division	Position	Yrs. At Firm
Professional Services	PS-1	US		GML	14
Professional Services	PS-2	US		GML	13
Professional Services	PS-3	US		GML	7
Professional Services	PS-4	US		GML	13
Professional Services	PS-5	US		GML	7
Professional Services	PS-6	US		GML	8
Professional Services	PS-7	US		GML	22
Professional Services	PS-8	US		CHR	10
Professional Services	PS-9	US		CHR	13
Professional Services	PS-10	US		CHR	5
Bank 2	B2-1	US	Human Resources	Global Head of Talent Development	12
Bank 2	B2-2	U.S.	Human Resources	COO of Talent Performance Management	5

Table 3 represents the profile of interviewees who had concerns about the overall talent management systems in their organization. Similar to the HR level profiles, some interviewees have been repeated as they also experienced challenges with their talent management system. While some of the years at the firm were not provided, Bank 1 shows a less tenured population with four out of seven employees having been with the firm for less than three years. Also found in Bank 1, none of the interviewees hold the same position within the organization. Five out of the six interviewees from professional services, however, hold the same position of Global Mobility Leader.

Table 3. Talent Management System Profiles.

Organization	Code	Country	Division	Position	Yrs. At Firm
Bank 1	B1-1	UK	Business Services		
Bank 1	B1-2	UK	Retail	Head of Change for Retail Business	11 months
Bank 1	B1-3	US			3
Bank 1	B1-4	UK	Corporate Banking	Center for Performance Led HR	
Bank 1	B1-5	UK	Wealth Management	WM Leadership and Talent Development and HR Business Partner	
Bank 1	B1-6	Ireland			3
Bank 1	B1-7	UK	Insurance	Talent Consultant	2-3 months
Bank 2	B2-1	U.S.	Human Resources	Global Head of Talent Development	12
Professional Services	PS-2	US		GML	13
Professional Services	PS-4	US		GML	13
Professional Services	PS-5	US		GML	7
Professional Services	PS-6	US		GML	8
Professional Services	PS-7	US		GML	22
Professional Services	PS-10	US		CHR	5

Table 4 consists of the profiles of interviewees who faced challenges at the line manager level. These challenges were raised by employees across different divisions who hold talent and global mobility positions. Of the nine interviewees, five came from Bank 1, two from Bank 2, and two from Professional Services. Again, these interviews were pulled into a separate category because individuals mentioned challenges in their interviews pertaining to the line manager level.

Table 4. Line Manager Level Profiles.

Organization	Code	Country	Division	Position	Yrs. At Firm
Bank 1	B1-1	UK	Business Services		
Bank 1	B1-2	UK	Retail	Head of Change for Retail Business	11 months
Bank 1	B1-4	UK	Corporate Banking	Center for Performance Led HR	
Bank 1	B1-6	Ireland			3
Bank 1	B1-7	UK	Insurance	Talent Consultant	2-3 months
Bank 2	B2-1	US	Human Resources	Global Head of Talent Development	12
Bank 2	B2-2	US	Human Resources	COO of Talent Performance Management	5
Professional Services	PS-2	US		GML	13
Professional Services	PS-5	US		GML	7

Professional Services

The first primary data set analyzed consists of sixteen transcripts of interviews from one decentralized professional services firm headquartered in the United States. The firm has 180,000 employees in over 150 countries globally and contains multiple organizations within the firm which will be referred to as *member firms*. The interviewees consisted of four males and twelve females. Over 56% of those interviewed have been at the firm for more than 10 years, but the firm years ranged from 4.5 to 22 years. Of the sixteen, seven were classified as global mobility leaders (GMLs), three as corporate HR (CHR), and six were expatriates sent on different global assignments in Shanghai, Argentina, Beijing, and India. The firm will be referred throughout the study as Professional Services (PS).

Bank 1

An additional set of primary data was obtained and analyzed by the researcher, consisting of seven transcripts of interviews whose subjects were all female. The organization falls within the financial services industry and operates globally in 38 countries with roughly 110,000 employees. Even though the organization has headquarters in the United Kingdom, it is classified as decentralized, in that each country has authority to localize practices to fit their region's needs. For the purpose of this research, the organization will be referred to as Bank 1 (B1).

Bank 2

Primary data collected by the researcher consisted of two interviews from a centralized firm in the financial services industry and will be referred to as Bank 2 (B2). The firm has over 55,000 employees globally located in 28 countries and headquartered in the United States. The

two interviewees consisted of one female and one male working for the human resources department, specifically in the talent segment. The interviewees were voluntary participants who the researcher was able to contact for participation via email. The female has been with Bank 2 for 12 years while the male has worked for the firm for the past 5 years. Bank 2 is classified as a centralized organization, where decisions and practices are followed through by businesses in all regions.

Chapter 4

Findings

During this study, challenges and barriers facing effective GTM within three organizations were identified from three different levels: the individual, the HR department, and the talent management system as a whole. After further data analysis was conducted, an additional level was later found to contribute to the effectiveness of the GTM system: the line manager. The 25 interviews represent voluntary participants, primarily within the HR and expatriate positions that had concerns with the effectiveness of talent management. Below are the major challenges that were discovered in the levels, with the line manager presented last as this was an unexpected finding.

Individual Level Challenges

Table 5 depicts the individual level challenges to GTM effectiveness as described by the expatriates themselves. Many themes emerged that correspond with the barriers and challenges faced from the perspective of the individual. One major theme that emerged was the responsibility of the individual to effectively network during their global assignment in order to have a successful re-entry process. Of the nine transcripts that related to individual level challenges, six expressed concerns of re-entering into their home country. All nine of the transcripts came from the professional services organization, which additionally holds the individual responsible for networking their way back home. Unless you successfully network, the

assumption is that individuals will “come back exactly to where I left from, the same process, the same city” (PS-13).

Another major theme that appeared from the nine transcripts was the transparency of the global assignment process and that “people never really know who to contact” (PS-16). Again, six out of the nine individuals from the professional services organization stated their concerns about their role in the global talent management process and its effectiveness. Challenges that expats face with transparency specifically relate to the lack of support and the lack of value attributed to their assignment when they return. During an assignment, individuals believe that the role is geared towards career development when the main focus is to fulfill a business need. While opportunities are available for top leaders to raise their hand for an assignment, senior leaders are also sent out based on client and business need.

Along with fulfilling the business need is the preparedness before leaving for an assignment. Six out of nine individuals expressed how not enough time was devoted to preparing someone for what to realistically expect in a host country. Specifically, one individual articulated that they “wished for a more robust process on how I was oriented to the local clients in my host country” (PS-12). Similar to preparedness, training was found to be not as meaningful from three out of the nine individuals. Even though training is offered to all individuals participating in a global assignment a concern is that “they’re not necessarily helping me I don’t think in the day to day work that I do” (PS-13). From these two examples, becoming acclimated into local practices seems to be a prevalent issue that multiple people face in the professional services organization.

Two other challenges that emerged from the individual level were regional and benchmark issues. From a regional standpoint, “the talent management and evaluation processes are a little more mature and co-defined if you will than in my host country” (PS-12). Another comment made describing regional difficulties was “you’re going to be staying up until eleven o’clock or midnight locally every night because you’re gonna have phone calls every night” (PS-

14). In terms of benchmark challenges, translating value added back to the US was a concern that three out of the nine individuals had. None of these individuals were informed on “how people view things and rate things, etc., and how that translates into the US environment” (PS-11).

Table 5. Individual Level Challenges.

Code	Re-entry/Networking	Regional	Transparency	Training	Preparedness	Benchmarks
PS-3			"I had a very clear picture of what we were doing and everything. In the US, I do have a more reduced vision of that"			
PS-4					"some of the feedback that we received, especially as these numbers have grown, is that we need to do it faster, we need to give more support"	
PS-6	"You have to be really careful at a senior manager level, if you're going on a global deployment because that can delay your start on the partner/director track, particularly if you don't have the right network"					
PS-11	"I do think it continues to be a challenge for us as a firm when we encourage people to get out and take these assignments to then bring them back and have them have a positive re-entry"		"I don't think anybody when I rolled into the role in Paris initially, or even came here, looked at it or really described it so much as a development role opportunity"	"I don't think we get enough meaningful training when you're out on assignment"	"I'm a little concerned about, realistically, kind of being up to speed on all of the things that have been done over the last, you know, three years in particular"	"that was one of my concerns, is kind of the differences of how people view things and rate things, etc, and how that translates into the US environment"
PS-12	"I really don't have any expectations of being put in a leadership position on my return or you know any other sort of specific roles"	"in my home country the talent management and evaluation processes are a little more mature and co-defined if you will than in my host country"	"on tactical matters when it comes to human resources and who's gonna fill what position those things tend to happen year to year"		"if I had a wish list I would have wished for a more robust process on how I was oriented to the local clients in my host country"	"I would not recommend generally that senior managers go on these kinds of assignments because that's when you have to be most focused on demonstrating your financial viability and value to our firm and you know often that's more easily done on your home turf"
PS-13	"the assumption is that I come back exactly to where I left from, the same process, the same city"		"I personally don't think it's very effective when you tick off that box it goes into some database for HR"	"there's training requirements in general but they're not necessarily helping me I don't think in the day to day work that I do"	"I think that the firm could do a more kind of onboarding before you launch and what to expect"	"in the US performance metric and ratings are based off the client service work. I was a little bit concerned on how I'd be able to communicate and translate the value of what I'm doing here back in the US"

Table 5. Continued.

Code	Re-entry/Networking	Regional	Transparency	Training	Preparedness	Benchmarks
PS-14		"you're going to be staying up until eleven o'clock or midnight locally every night because you're gonna have phone calls every night"	"there's a big emphasis on career development but it's sort of up to you to drive a lot of that stuff and to push for conclusions"			
PS-15	"I used my network. So I reached out to some people I know and just started asking around, saying, 'hey, I'm coming back, is there, do you have something?'"				"I don't think that the firm does a great job yet of taking into account what somebody's learned and how they may be able to apply that in the next job"	
PS-16	"If you're not actively and aggressively managing that yourself then you are gonna find yourself kind of putting things on hold coming over thinking great assignment building some great skills and then potentially going back to kind of right where you left"		"some things are handled by HR some things by Finance so people never really know who to contact to be honest with you"	"I'd been here for like a week once and I really wanted cultural training and I could not get it"	"I think within our organization because not everything's solved under global mobility I think we need to do a better job of coordinating it"	
Total # of interviewees	6	2	6	3	6	3
Total % of interviewees	67%	22%	67%	33%	67%	33%

HR Level Challenges

Indicators of the HR department level challenges to GTM effectiveness that were found in all three organizations were managing expat expectations, the repatriation process, and the alignment held between HR and the business unit. In Table 6, we find that seven out of the twelve individuals expressing HR effectiveness issues stated that a realistic conversation needed to occur to manage expat expectations. Some of the expectations included additional support, cost of living adjustments, and promotion expectation. One of the HR leaders describes that “there tends to be, I think, an attitude that if you do well you put your head down, you get your work done, you deliver a high quality product, it’s all good and people should notice that” (PS-4). Getting the work done in a global assignment is not the only factor considered during a promotion, however. Another HR professional highlights that “given the nature of our business we can’t always commit to having them returned to the geography that they’re from” (PS-2). Thus, expatriates must be open-minded about relocating even within their home country depending on what positions are available during their return.

In terms of managing the repatriation process, six out of twelve individuals interviewed acknowledged that improvements were needed for the repatriation process of expats stating that the people who tend to leave are the ones “who went back to the same office than went back to a different office” (PS-7). The lack of change in roles and responsibilities leave the expat questioning what the point of leaving in the first place was. HR admittedly states “in 50% of the cases, I’d say we have strategic plans and succession planning and repatriation planning in play” (PS-5). If only half of the individuals on global assignments have a designated succession plan, the other half are left without a set repatriation plan in place which causes concern.

Another barrier found in HR’s effectiveness was the alignment between the business unit and HR, where seven out of twelve individuals voiced concerns on how HR “is always trying to

sell the idea to the line partner” (PS-4). At the end of the day, the decision is made by the business on which top performers are ready for an international assignment. Even though tension may be created from HR “wanting to be stewards of the company, and wanting the business to do something one way” (B2-1), the business will always have the final say. The challenge then stems from identifying the boundary between selling the idea to the line manager and backing up a formed decision.

Staffing and budgets were identified as being challenges at the HR department level. Five out of twelve individuals expressed staffing as an issue where “supply is much greater than the demand...there are many more practitioners interested in global opportunities than we have the supply for” (PS-2). While the interest is high, not being able to place everyone where they would like or even at all is a reality faced. Besides the initial interest of participating in a global assignment, HR struggles with finding an appropriate match. Even when all pieces of the puzzle seem to be present a concern is raised by an interviewee who states, “for us in HR it was frustrating because we do have the interested people, we do have the openings, but we don’t have the match which is kind of hard” (PS-3).

Additionally, five out of the twelve HR individuals expressed that the cost of sending someone outside of the country is expensive. Multiple individuals stated how “some of the biggest issues that we run into again not dissimilar to other countries in another type of organization doing this is the cost to bring in expats” (PS-10). HR must take into account the length of an assignment, housing expenses, spouse/family expenses, and any tax or visa laws that must be covered. Because of these considerations plus the status of the economy, “moving people cross-border costs money...” (PS-7). Unfortunately, not every top talented individual who raises their hand for a global opportunity is able to go because of challenges with funding.

Table 6. HR Level Challenges.

Code	Staffing	Expat Expectations	Repatriation	Budgets	BU/HR Alignment
PS-1	"people are overwhelmed with all the things they need to do before they leave the country"	"we've seen far too often someone come back and they come back into the same office when they left, they're servicing the same clients as when they left...they're wondering why did I do this for the last three years!"	"funding is always the big issue and so if a need exists in a member firm then we will definitely try to identify who those best people are to send on an assignment"	"there is a lot from the business that's driven by a bottom line	
PS-2	"supply is much greater than the demand...there are many more practitioners interested in global opportunities than we have the supply for"	"given the nature of our business we can't always commit to having them returned to the geography that they're from"	"agreement on funding between member firms for assignments...smaller countries don't necessarily have the same funds that we do in the US"	"trying to deploy people as quickly as we need to as the business dictates because of immigration"	
PS-3	"for us in HR it was frustrating because we do have the interested people, we do have the openings, but we don't have the match which is kind of hard"	"if you don't tell them from the beginning, 'this is going to be hard and this might happen,' then of course they come back and tell you, 'I didn't expect this.'"	"you take that top gun out of the New York market and you say, alright we want you to build that practice in East Asia, that person is going to come out of East Asia back into New York and be behind their counterparts because they don't have the same opportunity there"		
PS-4	"there tends to be. I think, an attitude that if you do well, you put your head down, you get your work done, you deliver a high quality product, it's all good and people should notice that"	"in 50% of the cases, I'd say we have strategic plans and succession planning and repatriation planning in play, and the other half, you know, we spend six to nine months trying to work it out before they get back"	"there's a lot of talk about expense and so forth, the organization, HR individuals, is always trying to sell the idea to the line partner"		
PS-5	"some of those countries we will deliberately try to push more assignments to, even though it's harder to find people to go there, and we'll fund them more than we would other places"	"You have to set peoples' expectations appropriately, you have to create your network. it's just like starting a whole new job at a whole new firm"	"it's the repatriation and if they don't feel like- they don't feel the love, so to speak, you know...they're all going 'I made this sacrifice for the firm,' regardless of whether they did it because they wanted to or not, they're, like, 'I sacrificed, it was hard for me'"		
PS-6					"It's really a selling piece and I have to depend on the business leaders to sell the role. From my perspective as talent, I can't really sell it because I don't know enough about the work"

Table 6. Continued.

Code	Staffing	Expatriate Expectations	Repatriation	Budgets	BU/HR Alignment
PS-7	"you need to have that conversation because one of her challenges back to me was, you know, 'Oh, I didn't know that was supposed to happen.'"	"people who leave within a year of coming back, it tends to be more highly the people who went back to the same office than went back to a different office"	"some of the challenge that we have had over the past, you know, again, two to three years is just the economy has not been on our side. So, you know, moving people cross-border costs money..."		
PS-8	"They have to send and receive assignees, just like the US firm does. If I have two hundred people to send and I don't have places to send them, then there's no integration, right?:"	"if you're expecting to have three cars and a three-car house and, you know, on and on and on- That's how [they think they're going] to live when they move to Hong Kong, but that isn't their lifestyle"			
PS-9	"because of the location of some of these countries it's not always easy to find enough people interested in going there"			"we do not essentially fund assignments and, so certainly that's always a challenge that we hear from member firms and from leadership of that mobility is too expensive"	"how member firms are celebrating our successes in mobility, how they're through their communications how does leadership show their support for assignments"
PS-10				"some of the biggest issues that we run into again not dissimilar to other countries in another type of organization doing this is the cost to bring in expats"	
B2-1					"there's this tension between HR wanting to be stewards of the company, and wanting the business to do something one way...but yet the business really owns that decision"
B2-2			"these people are wondering, 'do I have a home when I'm back; is the same job I had still there for me years later.'"		"If a senior manager says 'we need to grow out South Korea, how do we do that,' that's when we step in and have a business conversation with them"
Total # of interviewees	5	7	6	5	7
Total % of interviewees	42%	58%	50%	42%	58%

Challenges to Effectiveness of TM Systems

As represented by table 7, several challenges were identified at the overall GTM level of effectiveness which include benchmarks, long term strategy, HRIS systems, regional, and transparency. In the professional services organization, evaluations are conducted twice a year with both the host country as well as home country so that the home country is aware of the progress employees are making while they are away. Even though both parties are involved in the overall talent management process, a major challenge found in all three organizations revolved around benchmark issues. Of the fourteen individuals who were found to have an issue with talent management effectiveness, twelve spoke of a problem their organization had with benchmarking their talent. Top talented performers are getting tracked and labeled as high potential, but overall there is no strategy “across the firm to say this is how we assess readiness” (PS-10). If the challenge is not corrected, too many people end up in a high potential category they may not belong in and “to move them into these new roles then causes a hole elsewhere” (B1-3).

A second significant barrier was found in the long term strategy of each organization or lack thereof. Nine out of fourteen individuals expressed concerns with their organization’s long term strategy when discussing top talented employees. While people are being plotted in nine box matrixes Bank 1 acknowledges “we’re not a mature international talent management operation” (B1-1). Similarly in the professional services organization, an individual states “it would be one thing if we really started to have more longitude data and you can look at people over time” (PS-10). Currently, neither organization seems to have confidence in the talent management systems being able to track “who’s going to take the organization forward” (B1-4).

A third challenge that emerged from the analysis was the HRIS systems and how “a number of people have talked about the HRIS systems as being problematic” (B1-3). In the two decentralized organizations (Bank 1 and Professional Services), six out of fourteen individuals

discussed how different databases are used to collect employee information in different countries. With no central database in place “we’ve no easy way of collating, collecting or sharing this data” (B1-5). If an expatriate in China gets rated as a 3 out of 4 and in the US is rated as a 4 out of 5, how can HR accurately determine the performance level of the expatriate? Another point addressed was that “the other countries they might not have access to all these online systems that we have in the US so you have to share documents and paperwork and it’s a lot of work” (PS-6). More advanced technology and systems in one country over another add to the challenges of the HRIS systems.

Two additional barriers analyzed in the overall GTM level of effectiveness were regional and transparency, which have also been challenges in the other two levels. Six out of fourteen individuals mentioned how “talent has always been locally owned and jealously guarded as opposed to being seen as an organizational resource” (B1-5). In the GTM process, practices are handled at the regional level yet again for the two decentralized organizations. A reoccurring issue is that “a lot of the things they create just don’t work here in the region” (B1-3). Challenges found in transparency all stem from Bank 1, where there is “no real active management of them in terms of where they come back to and where they are going in terms of their career” (B1-1). Bank 1 also acknowledges that “in our talent process we have no process that says we should go to people and ask them about their mobility” (B1-3). Unfortunately for expats and HR levels, transparency is a barrier even found in the overall GTM process.

Table 7. Talent Management Level Challenges.

Code	Benchmarks	Long Term Strategy	HRIS Systems	Regional	Transparency
B1-1	"...there should be some indicators to show that bench strength exists within the organization..."	"We're not a mature international talent management operation"		"I don't think we're 100% there yet in terms of really bottoming out how the regional versus functional piece will work"	"no real active management of them in terms of where they come back to and where they are going in terms of their career"
B1-2	"they leave them sitting as high potential/high performance and that's where we all know they're not"	"we don't have it for the organization so we can't plan ahead where we think our people are going to track to"			"we tell them they're talent, we bring them in but we then don't manage them as talent"
B1-3	"to move them into these new roles then causes a hole elsewhere"	"...we're plotting people on the nine box matrix but when push comes to shove and the real discussion around so what do we need to do to accelerate someone's readiness. What is the plan for their development?"	"A number of people have talked about the HRIS systems as being problematic"	"a lot of the things they create just don't work here in the region"	"in our talent process we have no process that says we should go to people and ask them about their mobility"
B1-4	"and I think we're recognizing we haven't got the right bench"	"we have to identify our leadership potential because we have to understand who's going to take the organization forward"	"even our talent data we don't necessarily have a central database to collect information to people"	"I think in the US for example they can't necessarily tell someone if they're viewed as talent because it will mean something (laughs) 'more' in terms of their contract"	
B1-5		"if we could get our heads around taking time to stop and think and plan more long term, which we're doing, but we need to get better at it and we need to do more of it"	"we haven't yet got a system, we've got no technology P, we've no systems, we've no easy way of collating, collecting or sharing this data"	"talent has always been locally owned and jealously guarded as opposed to being seen as an organizational resource"	"People weren't informed where they sat. It was almost like the final taboo...my division we're looking to be much more open and transparent"
B1-6	"we need to ensure that we retain and have absolutely key is having the right calibre of people..."	"I don't think we've got quite yet that balance and I don't think people management is as valued as it should be. I think that is going to take time"			"in other parts I do know across BANK again its very mixed; nobody has complete transparency"
B1-7	"people just seem to be looking at the nine box matrix in terms of performance and can they have one promotion"	"I think just the amount of change that's going on is talent going to be seen as top priority by the business"	"where I think this role is going to come into play is to create the organization wide sort of tool and process and infrastructure and to help bring that to life on an organization wide basis"	"they have got to create some tools that all divisions can use so therefore it will be a bit vague and unspecific for each division"	"Transparency it completely depends who your line manager is, who your business area are and it really, really differs"

Table 7. Continued.

Code	Benchmarks	Long Term Strategy	HRIS Systems	Regional	Transparency
B2-1	"what we do in North America, or in Europe, or in Budapest or Dubai, what we do there he wants the exact same thing done across the globe...because it's scalable"				
PS-2	"we use multiple systems to manage our various types of assignees and so we're doing a lot of tracking and management and sometimes some of those systems aren't integrated with the greater talent systems"				
PS-4				"in terms of the technology, in terms of the support, in terms of the idea for how things are supposed to work and even the connection between people in the States, it's very very US centric"	
PS-5	"we don't really have any specific metrics to measure it. You know, long-term retention, I think for us, because we do lose - even though we need some attrition, we do lose"				
PS-6	"...people are reviewed differently in different countries. The US has really high standards for getting people promoted so we really have to push that through"	"each member firm should have a top 200...a top 200 list of people that we want to get to be the next leaders and the next global mobility fix. I don't think we do that here"	"we're so systems driven that in the other countries they might not have access to all these online systems that we have in the US so you have to share documents and paperwork and it's a lot of work"		
PS-7	"we don't want to downgrade somebody who was in the top 5% of their university and all of that and now they're in the best of a really good pool...I think we struggled as an organization on the defining of high potentials"				
PS-10	"assessing people for readiness to go on assignment but we're not using anything that's you know strategically across the firm to say this is how we assess readiness"	"it would be one thing if we really started to have more longitude data and you can look at people over time and really do comparisons between path to partner...but we don't really have that level of data"	"there's some opportunity for us to look at metrics but again it requires that we have different I think database - that we have a database that really facilitates that"		
Total # of interviewees	12	9	6	6	6
Total % of interviewees	86%	64%	43%	43%	43%

Line Manager Level Challenges

The line manager of a top performer plays a significant role in the effectiveness of a global assignment. As we find in table 8, the two most prevalent themes found throughout the three organizations analyzed were line manager capability and letting go of their top performers. Seven out of nine individuals stated that the capability of the line manager effectively identifying top performers was a challenge faced in their organization. Bank 2 specifically mentions how “the manager doesn’t always have a holistic view of what a top performer is thinking” (B2-2), which creates mistrust in their judgment calls. In most instances, individuals are not even allowed to pursue an assignment unless their manager has approved it. If their credibility is perceived as low, how effective can line managers be in identifying the correct individuals?

A second prevalent theme found was the line manager’s inability to let go of a top performing individual. Of the nine transcripts analyzed for this table, six individuals agreed that “there are some managers who would be very sensitive about people going on a programme and then losing their staff” (B1-4). Instead of a professional opportunity for the top talented employee, the line manager perceives an employee leaving for an assignment as a loss. For this reason, a line manager’s credibility and motives are further questioned.

Table 8. Line Manager Level Challenges.

Code	Capability	Letting Go
B1-1	"I'd say we have a bit of work to do in terms of making sure that simple things like line manager capability are there"	
B1-2	"there is still that reluctance to downgrade people in talent terms"	"leadership teams tend to want to grow their own people and keep them in their own part of the business"
B1-4	"a lot of our challenges around capability gaps that a line manager should have in understand that actually being a talent manager is partly a role of leaders and it's not a process that we deliver"	"there are some line managers who would be very sensitive about people going on a programme and then losing their staff"
B1-6	"The process is there and understood but the capability of our line managers is weak"	"because nobody wants to let go of their best people and we don't necessarily have that kind of robustness here where everybody is willing to do that risk and release people and put them into a kind of critical developmental roles"
B1-7	"too process driven...round line managers, putting names in the matrix and thinking talent management is done and dusted"	
B2-1	"You might get managers that think their whole team is excellent and should be high potential...of course they've gotta defend them, right, because it's actually a reflection on them"	"you get the other type of manager that has been through the exercise before...knows they might get moved to a different job, so then, no one is a high potential on their team"
B2-2	"the manager doesn't always have a holistic view of what a top performer is thinking"	
PS-2		"there's always the challenge of someone who has top talent on their team...they may not want to be looking that far ahead you know in giving up a great resource"
PS-5		"yes, there is business unit of silo mentality where they're looking after their own people and if the timing isn't right, they're going to pull the plug"
Total # of interviewees	7	6
Total % of interviewees	78%	67%

Chapter 5

Discussion

After analyzing 25 transcripts of interviews, many expected and unexpected outcomes were revealed that correspond with previous research. The barriers and challenges were identified at four different levels to determine the effectiveness of global talent management. Based on previous research, three levels were expected to play a role in the challenges found which were the individual, HR, and overall talent management system. The following discussion serves to address the challenges presented at each of the three levels, while additionally addressing the challenges to talent management effectiveness at an unexpected level: the line manager. The barriers at each level are also explored in relation to previous findings made by former researchers.

As Ashton & Morton (2005) stated, talent management is an approach taken by HR and the business to improve the performance and potential of people. At the individual level, the value and uniqueness model described by Stewart (1997) helps to recognize and explore talent that is irreplaceable in a firm. This value, however, was identified as a barrier for two individuals in the professional services organization by two interviewees. PS-12 voiced concerns of not being able to show value at the senior manager level unless in their home country. Additionally, PS-13 showed concerns on how to effectively translate the value of projects completed in another country compared to their home country (United States). Individuals may be fulfilling a business need, but the lack of confidence in their organization's benchmarks serves as a barrier. As a result of this barrier, the individual level of effectiveness towards global talent is weakened.

Schuler et al. (1991a) identified the top variables influencing an expatriate's success to include the environment, job requirements, and personality characteristics. While this research focused on the successes that influence expatriates, the current research complements these findings with a different focus. Challenges involving re-entry, transparency, training, regional, preparedness, and benchmarks were found in contrast to the successes discovered. Schuler's environment variable relates back to regional challenges, however, because there were concerns with late night phone calls due to time zone differences and how talent management process are more mature in the home country. Thus, the local environment did have an impact on effectiveness at the individual level. Additionally, Schuler lists job requirements as a variable for success to illustrate the importance of an expatriate knowing what kind of work is expected of them in another country. This success variable coincides with the challenge of preparedness expressed by six out of nine of the individual level interviewees. The respondents state how an orientation to local clients (PS-12) and more onboarding (PS-13) would have helped their assignments.

A contradictory discovery from previous research was found in the influence of training programs. Brewster and Pickard (1994) found training programs to have a positive value for expatriates in their adjustment process, yet PS-13 stated "they're not necessarily helping me I don't think in the day to day work that I do." Three expats found the training offered not to be helpful which contradicts with previous research.

Bowen & Ostroff (2004) discussed that a company's HR practices must contribute to an overall business strategy. At the HR level, challenges arose for seven out of twelve interviewees in regards to the business/HR alignment. When there is a misalignment between HR practices and what the business is requesting, performance management is not achievable. As Armstrong and Baron (2000) argued in regards to performance management, there needs to be an understanding so that shared objectives are accomplished. According to PS-6, HR relies on the business to sell

the role of a global assignment because in talent they are not as rehearsed in what the work entails. Thus, the goals of both the business and HR must come together as more of a partnership than a barrier.

Cost pressures are prevalent, especially in the HR level of effectiveness because of lack of funding and economic factors. With an increasing competitive environment, the investment made in expatriates becomes a critical task to achieve. But, what about the investment that HR makes to the business? Woodruff (1973) discusses the importance of human resource accounting (HRA) as information about HR in dollar terms which was not an issue raised by any of the interviewees in the current research findings. Efforts made in recruiting people, the onboarding process, and the costs of training were not calculated in terms of a return on investment as Phillips et al. (2001) describes. Budget concerns focused more on funding rather than the effectiveness of HR practices in dollar amounts.

Staffing and managing expatriate expectations were also contributing factors to challenges at the HR level. Even though these challenges were not previously mentioned, according to Collings et al. (2007), there is a shortage of international managers available which creates a key strategic HR issue for multinational corporations. In contrast, some of the interviewees in the findings indicate that there are too many individuals interested and not enough international opportunities available (PS-2; PS-3; PS-8). Nonetheless, having a surplus or a shortage of talent causes a barrier in HR effectiveness, but is important to highlight the differentiation.

Managing expatriate expectations is discussed by Caligiuri et al. (2001), where expatriates are said to create their expectations of the host country before even leaving their home country. Seven out of twelve interviewees expressed challenges to managing expectations of expatriates. Having a conversation about what should be anticipated is important so that employees do not return home stating, "Oh, I didn't know that was supposed to happen" (PS-7).

When individuals are not provided with sufficient information prior to accepting an international assignment, ambiguity arises. Because of the ambiguity created, interviewees were led to believe they would receive promotions on return, similar salaries to home while abroad, and that their lifestyle would be similar in another country.

At the talent management system level, the predominant challenges were benchmarks, having a long term strategy in place, HRIS systems, regional, and transparency. Most of the challenges coincided with one another; especially barriers faced with benchmarks, long term strategy and HRIS systems. The main focuses of all three shares the difficulty in matching measurements with talent. The earlier studies cited discuss the value of talent compared to the difficulty of replacing that talent (Stewart, 1997), but actual effective systems were not identified. A study conducted in 2007 by Ready and Conger involved forty global companies that identified a lack of sufficient talent pipeline to fill strategic positions within their organization. B1-4 reported a similar insufficiency in their organization's HRIS systems where the realization is "we don't necessarily have a central database to collect information to people." By not using a central database, top talented employees in other countries may be slipping through the cracks and not filling strategic positions as mentioned by Ready and Conger.

A Harvard Business Review article addresses the steps needed to build a successful talent pipeline which were to focus on development, identify linchpin positions, make the system transparent, measure the progress regularly, and to keep the system flexible (Conger & Fulmer, 2003). Additionally in the article, an example of a best-practice matrix tool is shown, where the vertical axis tracks performance results and the horizontal axis tracks the leadership behaviors. By creating a more efficient, company-wide tracking system, benchmarks and long term strategies can easily be adapted in any country. This study has been cited as a potential remedy for the challenges presented regarding issues with the talent management system. The steps addressed in the article serve as possible best practices specifically for benchmarks and HRIS systems.

Performance management tools such as a matrix help to project where people are going, their readiness to take on a new role, and what opportunities are available once they return. B1-7 expresses how “people just seem to be looking at the nine box matrix in terms of performance and can they have on promotion,” but assessors should bring the focus back to development in order to find meaning in someone’s potential talent.

To further address the regional and transparency challenges in talent management systems, Mellahi and Collings (2010) describe agency theory, where the headquarters of an organization is able to make decisions on behalf of, or that directly impact their subsidiaries. When the goals of headquarters and the subsidiaries do not align, the relationship between the two can turn into competing interests (Mellahi & Collings, 2010). This relates back to the findings presented because the challenges in talent management systems were only found in the two decentralized organizations: professional services and Bank 1. As B1-3 admits, “a lot of the things they [U.K.] create just don’t work here in the region [U.S].” Similarly, PS-6 mentions how “people are reviewed differently in different countries.” When a system or process is created in the headquarters of the organization, it cannot be assumed that those same processes will apply in every region. Overall talent management systems face a barrier in finding out which processes can be adapted in which areas and recognizing that subsidiaries hold value in the systems they implement as well.

A fourth level that was not initially expected was found to be just as prevalent in the barriers and challenges identified. The line manager effectiveness had a significant presence in the findings when referring to capability and letting go. Stahl et al. (2012) mentions management involvement as part of the six principles in the effectiveness of global talent management. Line managers are typically the first line of contact an employee has with management which is why a relationship is essential when having conversations about talent. The effectiveness is comprised, however, when managers are not able to downgrade people in talent terms (B1-2), or their

capability is weak (B1-6). If the line manager is unaware of how well their direct reports are performing, who else is held responsible for documenting their successes and failures?

In terms of line manager capability, research was conducted where forty line managers were interviewed on their experience of undertaking HR work in their organization such as performance appraisals, pay awards, and recruitment (Renwick, 2003). The results indicated that line managers found that they still needed HR advice, that performance appraisals were time consuming, and that the appraisals were something they lacked “discipline” in. Similar challenges were found in both bank organizations, where line managers would put names in a matrix without understanding why (B1-7), and having a holistic view of their top performers (B2-2).

Supporting this study’s findings, the ability of line managers to let go of top talent is also described by Mellahi and Collings (2010). Managers were found to send less capable performers because there is no direct benefit to the manager if their top performers were to move on to other subsidiaries. For this reason, it is not in the self-interest of a line manager to essentially let go or share their best talent with other businesses in the organization. Especially in decentralized organizations, where subsidiaries are rewarded or punished for their own performance, why would they willingly give up their best talent (Mellahi & Collings, 2010)? The challenge arises even in current findings for line managers who are sensitive about losing their staff (B1-4), not wanting to put them into critical developmental roles (B1-6), and not wanting to give up a great resource (PS-2).

Chapter 6

Conclusion

When discussing the effectiveness of global talent management, one level cannot be said to solely contribute because effectiveness is achieved by multiple levels. The barriers and challenges that influence the effectiveness have been identified in this study as the individual, HR, line manager, and overall talent management system. The four levels presented challenges regardless of whether the organization was in professional services or financial services, decentralized or centralized, headquartered in the United States or in the United Kingdom. The research presented illustrates the importance of multiple levels contributing to the effectiveness of global talent. HR has been described as being tasked with creating value and finding talent within the company that aligns with business strategy (Becker & Gerhart, 1996), but the findings and discussion of this study serve to recognize that more than one level faces challenges in aligning talent with business objectives.

The results identified complement previous research that have explored the effectiveness of global talent management and the steps needed for a successful expatriate assignment (Stahl et al., 2012; Schuler et al., 1991a). Whether concerns lie in transparency, regional biases, or expectations, each challenge has an influence on how effective global talent can be managed. Even though the line manager was an unexpected level determined after further analysis, previous research does support and acknowledge the contributions made by the line manager (Renwick, 2003; Mellahi & Collings, 2010). Current findings presented an additional challenge with the line manager's capability which was not discovered in previous research.

As multinational corporations grow their businesses internationally, managing talent becomes more significant as well. With the strategy of maximizing profit and minimizing costs to build a competitive advantage, there is no organizational decision that is made without considering if it can be done cheaper or better, or both (Pfeffer, 1997). Organizations must acknowledge the investment made in people to perform effectively and efficiently. These results are important because realizing the barriers and challenges presented at each level can further help prevent top talent individuals from leaving an organization. Knowing the challenges to the effectiveness of global talent management is just as important as knowing the positive outcomes that contribute to the effectiveness. Additional research would benefit from looking into the solutions for the challenges that have been identified.

Limitations

Limitations were discovered during the creation of this study. Using qualitative research does leave room for subjectivity in the overall findings because the interviews were specifically analyzed to identify what the researcher was looking for. Along with qualitative research, primary data was obtained from a previous researcher which limits the research question that can be formed and answered. Even though a vast amount of information was provided with the use of primary data from two organizations, the information collected was used to answer a different research objective. The validity of the findings can therefore be questioned since new interview questions were created to correspond with previous research.

Another limitation presented was the sample size of participants. Sixteen interviews were collected from the professional services organization, seven from Bank 1, and two from Bank 2. Twenty-five interviews from three different organizations may not be sufficient enough

information to draw conclusions from and any inferences drawn from Bank 2 in particular are limited due to lack of voluntary participants. Professional services and financial services cannot be said to only experience issues in the effectiveness, and therefore research was limited to the organizations available to the researcher.

Further limitations are presented in the findings at the individual level, specifically with re-entry concerns. All expatriates interviewed were currently on their global assignment, and therefore were speculating what the re-entry process was like for their organization. This challenge was opinion-based, and not actually experiences by any of the interviewees. Expatriate interviews were also only available from the professional services organization and not from either of the banks.

Additionally, only female participants were collected from Bank 1 which can contribute to similar generalizations made when the sample is not diverse. Again, findings from Bank 2 were limited by the researcher's access to individuals, so any inferences drawn from this data set can only be speculative and require further research in more centralized contexts. One interviewee did not want to be recorded, which further influenced the researcher's ability to take detailed notes that would accurately capture everything that was said during the interview.

Given this limited data, research supports that any data found is better than no data. Glaser and Strauss (2009) should further be referenced as the researchers describe *grounded theory*, where systematically obtained and analyzed data can lead to discoveries even when the number of organizations is limited. While a subjective review of the data questions whether results are generalizable, Glaser and Strauss (2009) argue that any data used to draw conclusions is good data.

In the methodology used, the codes were manipulated and simplified by the researcher according to keywords that were commonly found in the transcripts, but could be coded differently by another researcher. Constructing four different tables to present the analysis could

instead be presented as one larger table to reflect all the challenges and barriers found in one spreadsheet also in the methodology, the analysis of the transcripts focused on identification rather than hypothesis formation which would have strengthened the findings of the study.

Future Research

Future research would benefit from having a larger sample size that does not only focus on professional services and financial services industries. When the industries are broadened, a more accurate generalization can be made of what challenges prevent the effectiveness of managing global talent. Also, future research can focus on a specific level of effectiveness. In this study, only six expatriates were analyzed for effectiveness at the individual level, but other researchers may be able to collect an extensive set of data on just only expatriates and the barriers associated with them. A more specific comparison between two of the levels discovered can be assessed for the differences and similarities across industries. Identifying the barriers and challenges can serve as a resource for ultimately discovering the steps taken to deliver effective global talent management in any organization. Addressing the challenges of the individual, HR, line manager, and talent management system could influence the costs spent on replacing individuals and keeping top talent within organizations for a longer term.

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Appendix A

Professional Services Interview Questions

1. What strategies are used by HR to combine employee performance and potential?
 - a. Can HR drive performance/potential of employees not viewed as top talent?
 - b. From an HR standpoint, what qualities separate top employees from the rest?
 - c. Is the focus of HR on managing talent only for top employees?
2. What are the roles carried out by HR in GTM?
 - a. What challenges arise when carrying out these roles?
 - b. How is HR able to add value to the business?
 - c. How does corporate HR (CHR) measure the effectiveness of GTM on performance?
3. What metrics are kept by HR?
 - a. How do these metrics influence the retention of employees?
 - b. What quantifiable strategies are used to link practice with performance?
 - c. What are some of the more costly practices used to manage performance and how does HR justify the cost?
4. Does context make a difference?
 - a. What role does regionalization play, if any?
 - b. Are different strategies more effective depending on region?
 - c. What separates global integration from local responsiveness? When is one used over the other?
5. How does management involvement help to establish GTM?
 - a. Must an alignment of strategies and performance be created?

6. Is there evidence that HR can actually achieve GTM?
 - a. What role does CHR play in helping to develop a more integrated GTM system?

Appendix B

Financial Services Interview Questions

1. What are the roles carried out by HR in global talent management?
 - a. What challenges arise when carrying out these roles?
 - b. What are some of the roles not carried out by HR in GTM?
 - c. How are expat expectations managed and addressed?
2. What measurements are used to identify top talent?
 - a. How are these measurements quantified to link to performance?
 - b. What are some of the less costly practices used to manage performance and how does HR justify this cost?
 - c. What are some of the less costly practices used and how frequently are these used in place of more costly practices?
3. How does management involvement help to establish GTM?
 - a. Does management influence or hinder a global assignment?
 - b. Do the goals of an assignment relate to career development?
 - c. Is there an alignment between HR's role and management's role in GTM?
4. Does context make a difference?
 - a. What role does regionalization play, if any?
 - b. Are some regions more favorable to send global assignments? Why?