Chapter 1

Challenges in Developing and Implementing Global Selection Systems

The development and implementation of global selection systems have benefits as well as challenges. (See Figure 1.1.) When standardization occurs, numerous advantages to the organization can be gained and the costs related to employee selection greatly reduced. (See box below.) A globally consistent selection program enhances talent management and aids the organization in deploying human capital where needed by providing accurate, job-relevant information on applicants and employees. In addition, common staffing practices help communicate the organizational culture to applicants in a consistent manner around the world. However, developing a globally standardized selection system is a challenging task that requires careful thought and planning. In this chapter, we will provide an overview of the common challenges in this type of undertaking, each of which is explored in depth in subsequent chapters. The challenges that are discussed below are based on the experiences of large multinational companies (MNCs). Some of the examples come from a study of six major MNCs (IBM, P&G, Agilent, Shell, Dow, and Motorola) that developed selection systems for global use (1). Other information comes from our own work with MNCs based in the USA and Europe.

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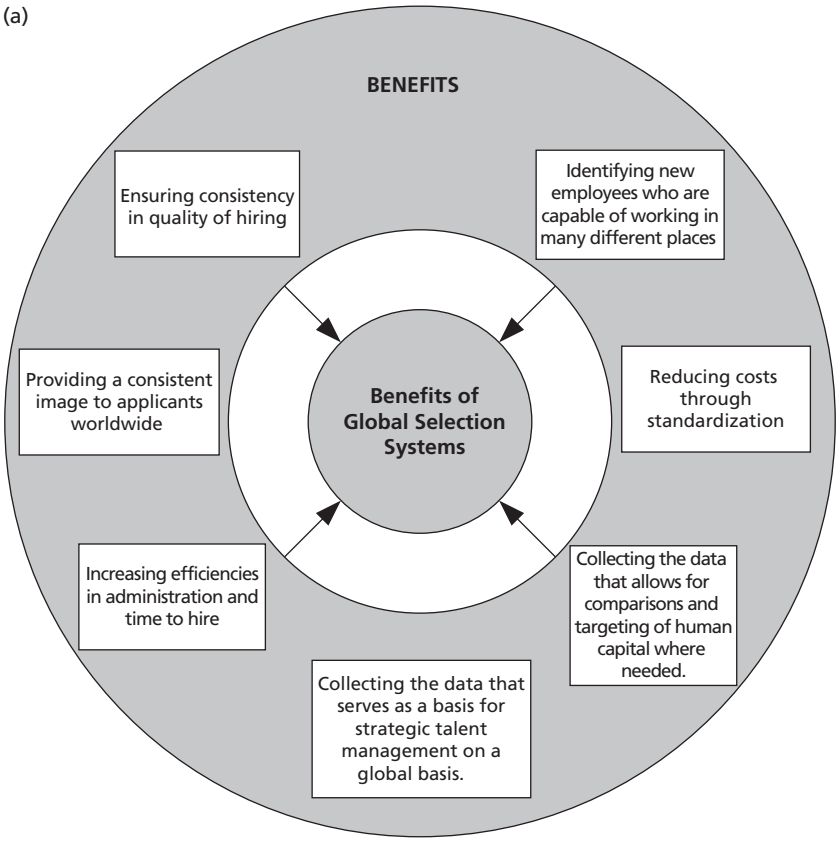

Figure 1.1 Benefits and Challenges of a Global Selection System

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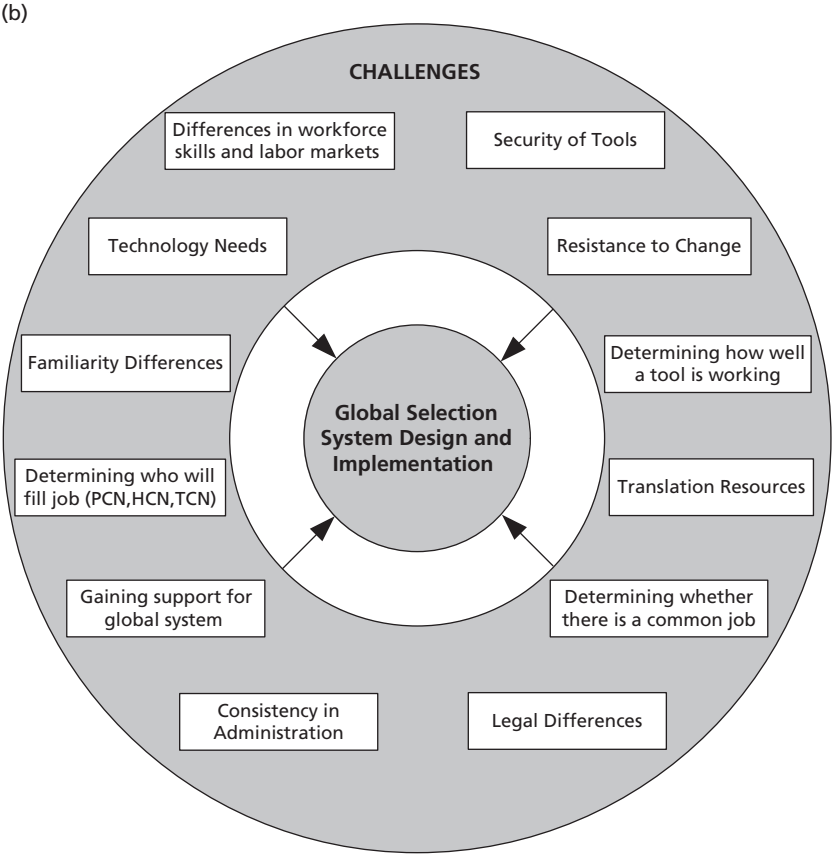

Figure 1.1 *Continued*

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Good to Know:
Costs and Efficiencies in Global Selection Systems

Selection systems have three primary sources of costs: (a) development, (b) implementation, and (c) ongoing operational use.

Development includes development of tests, interview protocols, and accompanying materials, and validation (i.e., the process of demonstrating these tools do indeed help select the best candidates). Many of these costs are fixed, and to the extent that this effort is minimized or the same or similar instruments are used in multiple places, significant savings accrue. However, a few development costs such as translations are specific to a location and recur in each new culture.

Implementation includes activities such as loading assessments on computerized administration platforms, printing tests, training administrators and interviewers, communicating with users and hiring managers, etc. Because many of these activities are generally repeated many times, they can be costly. Again, when a product is used multiple times, the cost savings can be significant. For example, developing one interviewer training program for global deployment is much cheaper than developing a different one in every country.

Operational use includes activities associated with actually administering, scoring, and using selection tools. Most of these activities are performed locally so there are few opportunities for savings from activities like administration, scoring, data management, etc. Nevertheless, common systems and policies can be used. For example, one database that is used for a repository for applicant information is cheaper than twenty.

Challenges in Selection System Development for Global Use

As our Global VP of Sales in our introductory scenario discovered, many challenges can arise in developing a selection system for global use. To address these challenges, we have organized this chapter around a set of questions that will focus your attention on some of the critical decisions to be made before embarking on a global selec-

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Case Scenario

The corporate HR Director and the corporate Manufacturing Director are debating whether to implement a global selection system for engineers in all of the manufacturing plants or to allow each country to develop its own system tailored to the location's special needs. The Manufacturing Director feels that a good engineer needs to have the same skills no matter where in the world you go, and he wants the HR group to come up with a useful web-screening tool and interview protocol that can be implemented worldwide. The HR Director believes that cultural differences mean that different skills and characteristics are needed to perform the engineering job in different countries, and therefore each region needs to come up with its own system.

tion system. (See Figure 1.2 for a summary of the questions.) While answering these questions is often difficult, failing to ask and address them can lead to catastrophe.

Do the Leaders in My Organization see the World as Converging or Diverging?

Whether you even consider the possibility of developing a global selection system depends a lot on where you stand on *convergence* and *divergence* (2). (See Figure 1.3 for an illustration.) Consider the following case study.

Some, like the Manufacturing Director in the case above, subscribe to a view of convergence: Societies are growing more alike, and there is an increasing interchange of ideas, goods and people. Consequently, there are many universals that transcend national borders and affect the ways in which business is conducted. Similarly, competitive pressures often lead organizations to eventually adopt universal best practices. Others, like the HR Director in the vignette, feel that the tendency toward convergence is overstated and that local culture still has significant effects on how work is done. Employee preferences and practice differences related to culture are still very important (3, 4). Others note that to be competitive, products and services have to be "fine tuned" for the local customers (5).

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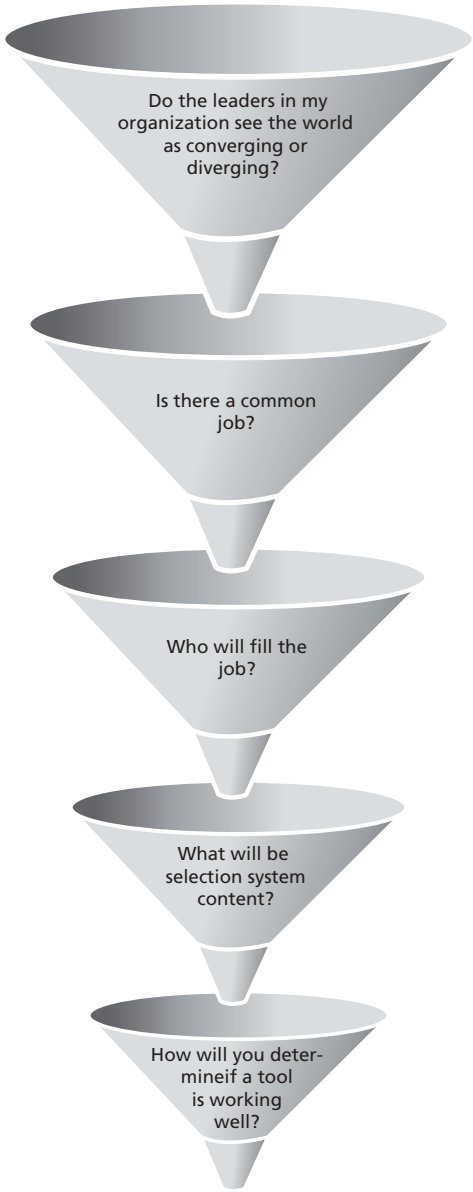

Figure 1.2 Critical Questions to Answer before Designing a Global Selection System

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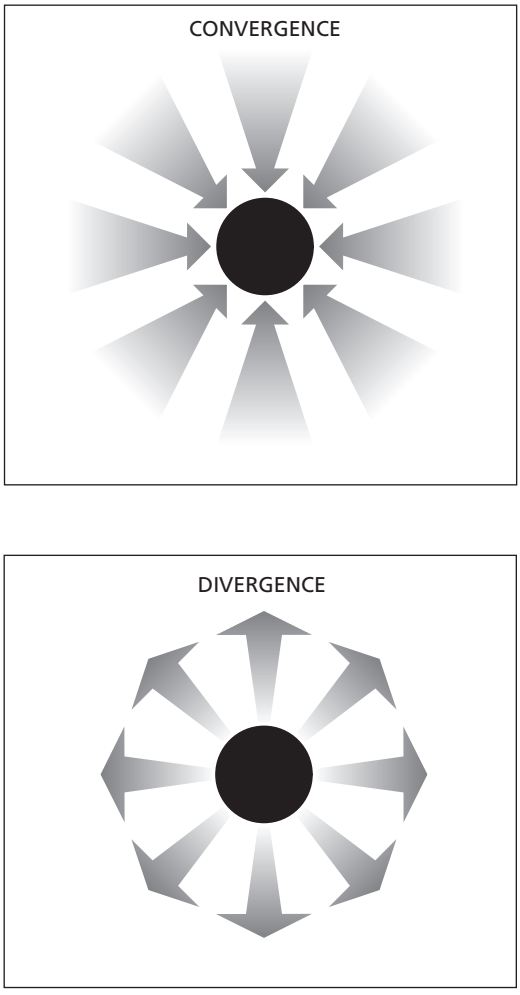

Figure 1.3 Convergence – Divergence

Of course, elements of both convergence and divergence exist. Some things are converging into one universal practice – for example, communications via the Internet. At the same time, numerous local customs remain firmly entrenched. Whether your organization is already moving toward convergence in staffing systems, feels convergence is an inevitability, or considers divergence too great to allow for

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standardization in selection, is a question you will have to explore and answer. We hope this book will provide you with guidance in doing so.

The pressures for global integration or local responsiveness vary according to many factors, including the industry, the function, task, and the organizational level. Within a single organization, some things may be converging; others diverging. For example, the design and marketing of consumer goods may need to be tailored to customs of a region while computer hardware and software share common features across national boundaries. Policies may be set internationally but sales promotions may be designed locally. Human resource (HR) management is frequently considered the most local of functions (5). Often, an organization that has global processes in manufacturing and finance still has differentiated HR practices, including different selection tools and processes in different locations.

One key to success in implementing a global selection system is determining if there is enough convergence to make it worthwhile using a similar system across locations. Even if you believe there is evidence of sufficient convergence, convincing it may be a challenge to convince others in your organization that similarities in jobs and staffing processes exist. Some of your associates will focus on the differences rather than the commonalities. Also, many will have a vested interest in divergent staffing.

Is There Support for a Global System?

Garnering support for developing and implementing a global system is a first hurdle that must be overcome before anything else can happen. Individuals are rightly proud of their cultural identity and may be reluctant to follow a system "imposed" from elsewhere. Further, many individuals may feel that local responsiveness requires a different selection process in each location. Incorporating stakeholder views and gaining support will be introduced in Chapter 2 and expanded upon in Chapters 5 and 6.

Is There a Common Job?

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One of the first decisions you must make is whether there is a common job across locations and cultures. Often, this decision is made unconsciously or with minimal thought or systematic investigation.

However, just because jobs have a similar title across locations, you should not automatically assume them to be identical. Conversely, if a job is labeled differently and has different pay rates in different countries, that by no means indicates it is not essentially the same job. From a selection perspective, two jobs must have similar knowledge, skills, abilities and other characteristics (KSAOs for short) requirements to warrant the same tool. One selection process can be used for two jobs regardless of title if the tasks performed or the KSAOs required are similar. For example, both warehouse product pickers and customer order takers need to be able to read product numbers without error so a checking simulation could be used for both. In Chapter 2 we will discuss the process of deciding whether enough commonalities exist to use the same selection system or even just some of the same components of a system; in Chapter 5 we will describe specific issues related to making those judgments when looking globally.

Who Will Fill the Job?

Another early decision is determining whether the job will be filled locally, regionally, or from further afield. While lower-level positions often draw candidates from the local labor markets, higher-level positions may be filled by locals or expatriates from corporate headquarters or other facilities.

Definitions

expatriate: Citizen of one country working in another country
parent country national (PCN): Citizen of the MNC's headquarters country who is sent to foreign positions
host country national (HCN): Citizen of the country in which he/she is working
third country national (TCN): Citizen of one country, working in a second country and working for an MNC headquartered in a third country (e.g., a manager from Germany working in China for Ford Motor Company, which is headquartered in the USA)
inpatriation: Developing HCNs and TCNs through transfers to the headquarters country

Source: (6).

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Your applicant source affects your selection system design in several ways. First, the amount of education and experience possessed by your new hires determines how much training you will need to provide and how you should organize the work. Second, the selection system must be designed around the requirements of the job and is determined to some extent by the source of applicants. For example, if the candidates for a job are expatriates from your own company, you will have a lot of information about the applicant and so your selection process may focus on indicators of past performance inside the company. In contrast, if you are hiring locals in a foreign country to perform the job, you may not know how to evaluate their educational credentials and experience in terms of knowledge and skills, and you may want to evaluate them with a selection tool that provides information in terms you understand. If some jobs are always filled with expatriates, then certain KSAOs do not need to be assessed. You probably don't need to evaluate technical knowledge for a plant manager position if it is always filled from the ranks of managers in the headquarters location.

Why might an organization decide to bring in expatriate managers? In some circumstances, such a decision is made without much thought. However, the decision to use expatriates is often a conscious one when organizations wish to achieve aims such as those noted in the box below.

Best Practices and Common Pitfalls Using Expatriates

Best Practices
When implemented strategically, using expatriates can:

- Transfer knowledge from one location to other locations.
- Maintain informal social control over branches/subsidiaries.
- Provide opportunities for the development of high potential managers.
- Address shortages of qualified labor pools in a host country (7; 8).

Common Pitfall
Using expatriates can:

- Be based on tradition or expedience rather than a thoughtful, strategic decision.

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The table below illustrates different views on the use of PCN, HCN, and TCN employees. Recognize the pros and cons of taking a more ethnocentric, polycentric, regiocentric, or geocentric approach and choose what is best for where your organization is today – or where you soon plan to be.

Reliance on expatriates varies from firm to firm, country to country, and time to time. For example, though many believe that Japanese MNCs rely more on expatriates than European and US firms, that tendency appears to have declined (11).

Traditional expatriate assignments involve relocation of the employee and his/her family and usually last significant periods of time. While estimates vary, 20 percent of foreign assignments are terminated early (12). When there are shortages of individuals willing to accept the disruption associated with international assignments, it is necessary to rethink strategies to find and place qualified workers.

There tends to be fierce competition for individuals who have knowledge of successful business practices in emerging markets such as China and India. The pool of available and qualified individuals is further reduced because of the growing number of firms needing international managers. Overall, demand is high, and supply is low.

Examples:
Alternatives to Traditional Expatriate Assignments

- short-term assignments
- international business travelers, often called frequent flyers
- commuter assignments, in which the employee goes home regularly (e.g., Eurocommuting)
- virtual assignments, in which the worker performs the job remotely through technological aids
- new hires who seek and volunteer for foreign work experiences

Source: (13).

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Approach	*Description*
Ethnocentric (focused on headquarters culture)	• Uses PCNs • Relies on headquarters policies and procedures • Minimizes differences across cultures
Polycentric (focused on multiple local cultures)	• Uses HCNs • Orients program to individual country • Lacks global uniformity • Recognizes cultural differences
Regiocentric (focused on one region that may incorporate multiple cultures)	• Uses TCNs and HCNs • Selects within a region • Creates uniformity within a region
Geocentric (focused on the entire world across all regions and cultures)	• Uses PCNs, HCNs, and TCNs

Sources: (2, 9, 10).

In sum, a key challenge will be identifying what approach you will take in filling positions at all levels of the organization. The approach that works best at higher levels of the organization may not be appropriate for lower levels, given differences in talent availability and comparability across locations as well as the cost effectiveness of

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Pro	*Con*
• Optimizes control • Transfers organizational culture to other locations • Develops headquarters employees • Provides human resources when there is a lack of local qualified staff	• Generally costs more • Risks expatriate failure • Sometimes ignores local culture and needs • May fail to take into account possible legislative restrictions on visas and work permits • Uses more short-term appointments • Limits development of HCNs
• Develops local employees • Costs less than PCNs • Depends on longer-term appointments which are usually more efficient • Helps when there is lack knowledge of local labor market or languages	• Provides less control • Risks HCN failure • Does not promote familiarity with headquarters • Does not build international professional skill • Can be limited by local laws requiring company to hire certain numbers of HCNs
• Provides a neutral alternative • Expands labor pool within company	• Can be limited by legislative restrictions on work permits and visas • Relies on shorter-term appointments which are usually less efficient
• Selects best regardless of nationality • Promotes consistency across countries and regions • Can be sensitive to local cultures	• Can be limited in use by local regulations regarding hiring foreign workers • Requires more coordinates of human resource programs

using PCNs, HCNs and TCNs at lower levels. Another challenge once an approach is chosen is determining if it can be successfully carried out, given labor availability within your organization and in the locales where you have hiring needs. We'll address the issue of labor markets in more detail in Chapter 4.

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What Will Be Selection System Content?

Determining what to measure in a selection system as well as how to measure what's important presents many questions and challenges. You must decide if you will measure reading, math, or communication skills, and you must choose a format such as paper-and-pencil tests, interview, or work sample. There are also decisions to be made regarding question type – word problems, analogies, comparisons, etc. and response format – short answers, multiple choice, essays, etc. The cultural contexts in which the system is used will affect these choices. For example, because straight translations do not necessarily result in equivalent language, you may need to avoid questions that depend on understanding the nuances of meaning. A word that is very easy in English may be translated to a very difficult word in Chinese. Sometimes, a word does not have a comparable word in another language. For instance, many tropical countries have no words for boots. Some question content may be offensive in one culture. If the meat of some animals is not eaten in some countries, a test question that references eating that meat may distract the applicant unnecessarily. Some content may be considered unacceptably intrusive in some cultures. You may offend an applicant if you ask in an interview how he or she feels about past supervisors. In Chapters 3 and 5, we will discuss these specific challenges in determining tool content and effective ways to handle them.

Definition:
"What Is a Test?"

The term "test" typically conjures up images of #2 pencils and bubble sheets, strict time limits, and "one right answer." However, the term "test" actually refers to any method of evaluating an individual's knowledge, skills, abilities, or other personal characteristics. In the US legal system, tests are anything used to make an employment decision about a candidate, and this definition is widely adopted by professionals involved in selection system design. Tests can be as simple as a quick resume review or as complex as a demonstration of appropriate wiring for a piece of equipment. Tests can be informal and involve asking individuals to demonstrate a skill such as "develop an Excel spreadsheet" or

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"give a presentation." Or, tests can be standardized sets of questions with definite correct answers that measure a defined scope of knowledge. Tests can be given in many modes – paper-and-pencil, orally, or computer-based. They can be administered in proctored or unproctored environments. Tests also vary in how closely they reflect actual job tasks. A test can be low fidelity and resemble tasks performed on the job (e.g., a test composed of written or video scenarios of an interpersonal conflict followed by multiple choice questions) or high fidelity and identical to tasks performed on the job (e.g., a work sample test that asks a person to perform an actual job task such as troubleshoot a piece of equipment) or somewhere in between (e.g., a role play in which the person does what he/she would do in such a conflict situation). Interviews are in essence orally administered tests. Resume screens, application reviews, or past performance ratings used in promotion infer skills or knowledge from education or experience and are also considered tests.

Why the fuss? Knowing that all of these tools are really "tests" is important to understanding that the same principles for good construction and proper use apply to *all* types of selection tools. Too often we see organizations worry about the quality of traditional multiple choice tests and not hold the rest of the selection system to the same standards, when all components should be.

How Will You Determine if a Tool is Working Well?

Establishing the effectiveness of a selection tool is a difficult task to undertake in just one country, and the logistical challenges increase substantially when the evaluation involves multiple countries and cultures. The process of ensuring scores or ratings have the same meaning anywhere in the world is perhaps even more difficult. The user of a selection tool must compare scores across countries and determine if differences are due to the abilities of the sample of candidates taking the selection tool, the culture, or the content of the assessment. Chapter 5 focuses on how to address this particular challenge.

Challenges in Selection System Implementation across Boundaries

Developing a global system is only half the battle; the second half involves implementing a staffing process on a global basis. There are

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a number of problems that you should expect and be prepared to handle. Below we briefly list the most important questions to address. They are all discussed more fully in the following chapters.

How Can You Minimize Resistance to Change?

Resistance to a new selection process needs to be investigated and evaluated, and then overcome. In a global context, there can be many reasons for resisting change. For example, Dow Chemical found that "cultural unacceptability" was mentioned by hiring managers and HR as a reason to not institute an online application tool; yet pilot testing of the tool had demonstrated it was universally positively viewed by applicants (14). In other cases, resistance arises from legitimate barriers to effective implementation such as lack of equipment or skills to administer the selection process or legal impediments.

The source of resistance can also result from the characteristics of the selection system. For example, some people may not like the type of selection procedure used; others may not like the standards that define qualification. Resistance does not always stem from the characteristics of the selection system; they can arise when local hiring managers and HR staff feel that a system was imposed on them rather than being created with their active involvement in its design and development. Chapter 6 covers how to effectively market a new system to stakeholders.

How will you Deal with Employment Laws that Differ Country by Country?

As we will point out in detail in Chapter 4, employment laws do differ across countries, and it is imperative that you understand those laws that apply to you in developing and implementing global systems and determine whether constraints proposed by those in a location are driven by law or custom. In the study of six MNCs mentioned earlier, Agilent Technologies and IBM found that in their efforts to create globally standardized systems, they often encountered beliefs that current methods could not be changed because they were "legally required" (14). Further probing at both organizations found that these procedures were more "the way it has always been done" than something that was legally mandated.

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Example:
A Unique Law

In South Africa, Section 8 of the Employment Equity Act (EEA) 55/1998 prohibits the use of psychological testing and other similar assessments unless the tool: (i) has been scientifically shown to be valid and reliable; (ii) can be applied to all employees; and (iii) is not biased against any employee or group. This is a much more stringent requirement than is to be found almost anywhere on the globe. Equal employment laws do differ from country to country, and in designing a global system, you must take this into account.

How Will you Address Differences in Familiarity with and Attitudes Toward Specific Tools Across Countries?

Familiarity with various selection tools differs from location to location. For example, a study of selection practices of 959 organizations from 20 countries documented variability in what types of selection tools tend to be most widely used in different countries (15). We will provide more detail on this in Chapter 3. Any attempt to institute a new selection system on a global basis needs to investigate and recognize the differences in familiarity with tools across cultures. Familiarity is important for several reasons. First, familiarity may affect how well an applicant does in the selection process. Someone who has never worked an analogy may be just as smart as a person who has worked many such problems, but the applicant who is unfamiliar with analogies may score lower due to lack of familiarity. Second, applicants may dislike tools containing question formats with which they are unfamiliar and feel that they are disadvantaged in the hiring process. These perceptions may translate into less attraction to the hiring organization and willingness to pursue employment. Third, unfamiliar types of selection tools may not be trusted by local managers, greatly increasing the efforts needed to implement the new processes. Finally, in some cultures, any kind of testing is neither common nor valued. Again, you will have to explain what you are doing and why you are doing it, and then demonstrate the effectiveness of the selection system to convince local managers of the value of a new

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selection system. In Chapter 6 we'll discuss specific ways to address unfamiliarity with testing and item types.

How will you Ensure the Security of Assessment Materials?

Cultural acceptability of sharing selection process information varies too (16, 17, 18). In some countries, employees and applicants are careful to maintain the security of materials. In other countries, materials may be widely disseminated regardless of prohibitions against doing so. Successful global implementation requires considering the likelihood that hiring tools will be compromised – and finding ways to safeguard against this. In Chapter 6, we will discuss this issue in more detail.

How can Consistency in the Administration of the Process be Achieved?

Standardized conditions help ensure each applicant has the same opportunity to display his or her skills in a selection process. However, ensuring consistent administration is not always easy. Proctored testing in appropriate environments may not be possible in some locations. Using an Internet-based platform for administering tools may ensure consistent standards in locations where the Internet connections are good, but not in those places where connections are sporadic or access is limited. The importance of understanding the staffing environment will be covered extensively in Chapters 2 and 6.

Example:
3M's Staffing Environment in India

3M employs over 1,000 individuals in many locations across India. Although all staffing is carried out from Bangalore, sourcing firms are used to identify qualified candidates at each location. These sourcing firms review resumes but do not administer testing as an early screen. Consequently, 3M defers testing until candidates are interviewed in Bangalore, resulting in a selection process that is quite different from the process in locations where screening via computerized testing can take place early on. Even then, testing cannot be consistently administered as interviews are often conducted in hotel lobbies rather than in locations where standardized testing is facilitated.

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How Will You Find Translated Tools or the Resources for Translation?

We have seen many an instance where an organization has a great tool in place in one locale and desires to adopt it worldwide only to find that there are not versions in all the languages for all the locales in which they will be hiring. There is also an under-appreciation for how much a high-quality translation process costs. For organizations doing business in multiple languages, budgeting for this aspect of the process is essential. Managing translations of tools will be covered in Chapter 5.

How Will You Acquire Needed Technology when Familiarity and Availability Varies from Country to Country?

While the Internet has certainly played a unifying role in businesses globally, the average applicant may not have the same resources or familiarity with technology as employees have at their offices in the organization. Access still varies considerably throughout the globe, as does the speed of transmission and the quality of equipment. Designing a global selection system requires careful consideration of the extent to which the technological capacities of *applicants* in all locations match the selection system requirements and the organization is willing to invest in providing needed technology for applicant use. Chapters 5 and 6 will touch upon addressing this important issue.

How Will Differences in Workforce Skill Levels and Labor Markets Across Countries Affect Your Efforts?

Even with a well-developed and well-supported selection system ready to be fully implemented in multiple locations, the usefulness of the selection system may be in question when the number of available applicants with the needed skills varies from place to place. For example, in countries with high unemployment rates and a large number of qualified applicants, a good selection system that identifies candidates with the appropriate skill sets may be welcomed. In contrast, when employment rates are high, there may be an insufficient number of applicants, and a selection system that further reduces the applicant pool may be more unacceptable than unqualified

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employees. In different locations, rates of illiteracy, enrollment in higher education, and expenditures per pupil by educational systems vary considerably, leaving an organization with large differences in numbers of potentially qualified applicants across locations. No matter how good the selection system is, applicants who possess the fundamental skills required by the job are necessary for it to be an effective part of the overall hiring process. The challenges insufficient labor pools present will be discussed in greater detail in Chapter 4.

Organizations may also differ in how they respond to diminished labor supplies. For example, a common US response to labor shortages is to bring more foreign workers into the USA or to send work offshore, while organizations in Hong Kong typically focus on internal strategies for the retention and development of existing employees (19). Because labor uncertainty is handled differently in different places, local managers will respond to selection systems in different ways. A highly selective process will not be well received when a labor shortage already makes it difficult to fill positions. A less stringent selection process will be of little value when qualified applicants are plentiful.

Let's return to our Acme Global VP of Sales and discuss how he might have used the ideas in this chapter to avoid some of the problems he faced. It is clear from the scenario that in general HR practices at Acme are fairly differentiated by locale, and that many of the organization's executive leaders neither see convergence occurring nor support a global system. If our Acme VP had greater awareness of his environment upfront, he might have moved more cautiously in thinking that a good selection process in one locale would be embraced globally.

Second, our hapless Global VP of Sales could have won more people over if he had armed himself with data to support treating the sales job as equivalent worldwide. Without agreement on the commonality of the job, he cannot successfully argue for a global selection system. Providing evidence of an equivalent sales rep job and obtaining agreement on this issue early on would have paved the way for a global system.

Third, the VP could have done some homework on how positions are sourced in each country so that he would be ready for objections

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related to difficulties in recruiting and administering the tests and interview. Similarly, if the VP had paid attention to variations in who filled the job in each country, he might have adapted his selection process to better fit the applicant population.

Fourth, a plan for evaluation might have gone a long way to reassure the other VPs, some of whom felt disenfranchised by the imposition of the new selection process, that the Global VP's ultimate goal was a selection process that worked.

Each of the challenges that arose – the acceptability of content, the quality of translations, the evidence of tool effectiveness, the legal environment, tool security, technology needs, and administration consistency – will be addressed in the chapters that follow.

Benefits of Global Systems

After reading a chapter on challenges, you may be rethinking your interest in a global selection system! Lest you get discouraged, let us emphasize the many benefits of a global selection process (1):

- Ensuring consistency in quality of hiring.
- Identifying new employees who are capable of working in many different places.
- Providing a consistent image to applicants worldwide.
- Reducing costs through standardization.
- Increasing efficiencies in administration and time to hire.
- Collecting the data that allow for comparisons and the targeting of human capital where needed.
- Collecting the data that serve as a basis for strategic talent management on a global basis.

For your planning and internal discussions, we end each chapter with a list of questions to stimulate your thoughts about your work and labor environment and potential selection systems. You probably won't be able to provide answers to all of these questions when you finish reading each chapter. The answers may take some thought and some investigative work on your part. However, knowing what questions to answer should be part of your planning.

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Think about this!

- What is the makeup of your current workforce? How many locations? How many languages? How heterogeneous are global operations?
- Where will you need workers in the future? What kind? How many?
- What are the challenges that face your organization in designing a global selection system?
- Where can you achieve cost efficiencies in development, implementation and use via global standardization?
- Do you have jobs that share considerable similarities in terms of tasks and KSAOs across locations or is each one unique?
- What is the organizational mindset regarding convergence/divergence in practices?
- What is your current approach in the use of PCNs, HCNs, and TCNs? What do you wish it to be?
- Do you have support for global implementation?
- What are your current processes for selection of expatriates and inpatriates? How effective are they?
- What are the major sources of resistance to change?
- Have you allocated resources toward translation needs?
- What are the legal constraints on selection system design in each location?
- How familiar are the tools you are considering in the locations of interest?
- Have you allocated resources toward ensuring the security of the system?
- What are the technology capabilities of the average applicant in each location? Is technology available in each location? Do you have the budget for it?
- What is the labor market profile in each location?
- What are the constraints on the physical environment for administering the selection system?

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