An Experiential Approach to Cross-Cultural Learning:

A Review and Integration of Competencies for Successful Expatriate Adaptation

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Abstract

This article outlines a taxonomy of skills necessary for cross-cultural learning based on Kolb's experiential learning theory. Review of the empirical literature on expatriate adaptation identifies 73 skills that cluster into ten thematic cross-cultural learning competencies. From this list, we propose here 7 essential and 2 developmental competencies for learning from cross-cultural experience. We describe the process of cross-cultural learning as the interaction between person and culture. We propose relationships between culture, learning and success in cross-cultural adaptation and extend the concept of learning style to account for the influence of culture. Finally, we explore the implications for management development and education pedagogy.

Introduction

The internationalization of management education and learning has become well established. Effective managers no longer work solely in the comforts of their home culture, but also must learn to work across cultures. These cross-cultural experiences occur in many forms: encounters with individuals of different cultures, jaunts to overseas customers or suppliers, short visits to international divisions, and long term emersion in a new host culture have become an expected, even required, aspect of management success (Adler, 2001; Mintzberg & Gosling, 2002). One of the most intense cross-culture experiences comes in the multiyear foreign assignment: the expatriate experience. From these experiences, expatriates tend to learn a variety of skills that facilitate success in a new host culture, transform their home culture, and facilitate the transfer of knowledge across cultures (McCall, Lombardo, & Morrison, 1988; Spreitzer, McCall, & Mahoney, 1997).

Expatriates often learn to manage across-cultures without formal training or education in cross-cultural skills. As a process likely to occur outside any formal educational system, cross-cultural learning fits naturally under the more general category of experiential learning (Boyatzis & Kolb, 1991; Kolb, 1984; Kolb & Wolfe, 1981). A growing stream of research and theory supports the notion that successful expatriate adaptation depends on how well a manager can learn from experience in overseas assignments (Porter & Tansky, 1999; Ratiu, 1983; Spreitzer, McCall, & Mahoney, 1997). Although the research on expatriate learning and the concept of learning from experience seem natural partners, they have yet to be linked in the literature. In the following, we integrate experiential learning theory with research on

factors for successful expatriate adaptation to a new culture. We begin by reviewing the

broad and diverse empirical literature on expatriates to identify the essential

competencies necessary for success in a cross-cultural assignment. We then

conceptually integrate these findings into a limited number of critical skill clusters.

These clusters are organized into a comprehensive, interdisciplinary, and systematic

model of cross-cultural adaptation based on experiential learning theory (Kolb, 1984).

Finally, we develop implications of this model for management learning and education.

Expatriate Learning and Adaptation

For more than 40 years, authors of studies have focused on discovering skills

essential for expatriate success. Indeed, the modern competency movement originated

with the identification of success factors in U.S. foreign-service representatives (see

Spenser & Spenser, 1993). Since these early studies an extensive – albeit diverse – body

of research has emerged. Comprehensive reviews (Benson, 1978; David, 1972; Dinges

& Baldwin, 1996) have been helpful in describing the skills necessary for expatriate and

cross-cultural success. These reviews have contributed to organizing the myriad of skills

suggested as essential for successful job performance by expatriates (Leibra-O'Sullivan,

1999).

Despite the extensive research and critical reviews, however, several barriers to

understanding cross-cultural learning remain. For example, much of the empirical

research remains poorly organized as lists of skills rather than an integrated theoretical

framework. Such listings fail to provide a comprehensive conceptual classification and

thus, remain detached from theory (Dinges & Baldwin, 1996). As important, Dinges and

Baldwin (1996) argued that research on expatriates' learning remains stifled due to "its

insularity from the social sciences and the lack of interdisciplinary perspective in design, measurement, and interpretation of results" (p. 121).

Other researchers (Ones & Viswesvaran, 1997; Ronen, 1989; Teagarden & Gordon, 1995) have usefully analyzed the past studies of expatriate competencies but have not looked at learning per se, instead creating a comprehensive categorization of necessary competencies to direct training (Ronen, 1989), corporate selection strategies (Teagarden & Gordon, 1995), and personality determinants of expatriate job success (Ones & Viswesvaran, 1997). The lack of an integrative framework for cross-cultural learning is particularly troublesome to those who study management learning and education because, although extensive lists of skills exist, this research has said little about how these skills are acquired, developed, or taught.

In summary, current research on cross-cultural learning suffers from a number of limitations. First, it lacks a cross-disciplinary approach that integrates diverse findings, makes sense of multiple methods of investigation, or guides research and practice. Second, reviews have focused on the skills and abilities necessary for training, success, or job promotion but have failed to account for how those skills are learned or developed.

In the following we integrate existing knowledge on cross-cultural adaptation with management learning theory to create an integrative, comprehensive and multidisciplinary approach to cross-cultural learning. We follow three steps. First, we conducted a comprehensive literature review of empirical research on cross-cultural and expatriate competencies. Second, to make sense of the diverse and often disparate findings of our review, we conducted thematic analysis (Boyatzis, 1998) to cluster the findings into a limited number of essential competencies. Third, to create an integrated

but comprehensive typology of competencies necessary for cross-cultural learning, we enlisted experiential learning theory (Kolb, 1984). Because we advocate that experience forms the basis of cross-cultural learning, we begin with details of experiential learning theory.

Experiential Learning Theory

Experiential Learning Process and Cycle

Kolb's (1984) experiential learning theory (ELT) remains one of the most pervasive theories of how managers learn from experience (see Kayes, 2002; Yuen & Lee, 1994). The theory continues to exert broad influence in a number of professional areas including education, psychology, medicine, nursing, general management, computer science, accounting, and law (Kolb & Kolb, 2004). The broad influence of ELT is evident in the more than 1,800 studies that have either directly used or been influenced by the theory in the last 30 years (Kolb & Kolb, 2004).

Basing this integrative model of learning on the works of Dewey, Lewin, Piaget, James, and Freire, Kolb argued that experiential learning encompasses the totality of the human learning process, where experience forms the foundation for four modes of learning: feeling, reflecting, thinking, and acting. Taken in order, these four modes represent a four-phase learning cycle. The learning cycle describes how immediate concrete experiences (CE) serve as the basis for observation and reflection (RO), in which the experience is subsequently assimilated into abstract conceptualization (AC). From AC, the experience is then formed into active experimentation (AE) with the world. AE both completes the cycle of learning and ensures that it begins anew by assisting the creation

of new CE experiences. Experiential learning theory makes important distinctions between learning abilities, learning style, learning skills, and adaptive flexibility.

Learning Abilities

Experiential learning describes "a holistic process of adaptation to the world" (Kolb, 1984: 31). To be an effective learner, a person must engage in four fundamental learning abilities associated with each of the four learning dimensions of CE, RO, AC, and AE. CE abilities call for being involved in experiences and dealing with immediate human situations in a subjective manner. CE emphasizes the ability to employ feeling, intuitive understanding in the present reality, and sensitivity towards other people's emotions and values. Individuals strong in CE abilities excel at relating to people with an open mind, value interpersonal relations, and perform well in unstructured and ambiguous situations. In contrast, AC abilities—the dialectic opposite of CE—involve the use of logic, ideas, and concepts. AC abilities require thinking, analyzing, and building general theories. Individuals with strong AC abilities are good at making systematic plans, manipulating abstract symbols, and using quantitative analysis. Precision, the rigor of analyzing ideas, the scientific approach, and the quality of a neat conceptual model are valuable to individuals with an AC orientation.

RO abilities require understanding the meaning of thoughts and situations by carefully watching and listening. RO emphasizes using reflective understanding to uncover how and why things happen. Those strong in RO excel at imagining the meaning of situations and ideas, seeing things from different perspectives, and appreciating different opinions. They value patience, impartiality, and considered, thoughtful judgment.

In contrast, the AE abilities emphasize actively influencing people and changing situations. AE focuses on practical applications and pragmatic focus on what works. Those with AE abilities are willing to take risks, to get things done, and to take responsibility for accomplishing objectives. Individuals with strong AE style are good at taking actions to influence their external environment and like to see results.

Learning Styles

A combination of two learning abilities constitutes an associated learning style (Kolb, 1984; Kolb & Fry, 1975). *Learning style* denotes an individual's preference for using two sets of learning abilities over another. The diverging learning style prefers CE and RO, while the converging style prefers AC and AE; the assimilating learning style prefers AC and RO, whereas the accommodating learning style prefers CE and AE.

It is important to note that a learning style results from the interplay between the person and the environment. Thus, while learning style arises primarily from individual characteristics, style is also shaped by social, cultural, and environmental forces. Five forces ranging from previous experiences to current circumstances shape learning style; these forces include psychological type, educational specialization, professional career, current job, and adaptive competencies (Kolb, 1984: 97).

Learning Skills

Learning style refers to general adaptive preferences and is distinct from *learning skills*, which encompass more situation-specific competencies required for effective performance on specific tasks (Boyatzis & Kolb, 1991, 1995; Kolb, 1984). Learning styles describe "higher-level learning heuristics that facilitate the development of a generic class of more specific skills" demanded from immediate environments

(Kolb, 1984: 93). Several studies have largely supported both the distinction and the

relationship between learning styles and learning skills (Boyatzis & Kolb, 1991, 1995;

Kolb, 1984; Kolb & Wolfe, 1981; Mainemelis, Boyatzis, & Kolb, 2002; Rainey,

Hekelman, Galazka, & Kolb, 1993). Each of the four learning abilities relates to a

particular set of learning skills. The CE mode encompasses interpersonal (CE) skills,

such as relationship-building, leadership, helping, and understanding people. The RO

mode involves perceptual skills, such as sense making, information gathering, and

information analysis. The AC mode involves on information integration and technology

skills. Finally, the AE mode includes behavioral (AE) skills such as goal setting, action,

and initiative taking. Figure 1 depicts the relationship between the ELT dimensions and

their related learning skills.

Insert Figure 1 about here

Developmental Learning

In addition to the general abilities, specific skills, and combined styles of

experiential learning, Kolb (1984) and his colleagues (Boyatzis & Kolb, 1991, 1995;

Kolb & Wolfe, 1981; Mainemelis, Boyatzis, & Kolb, 2002) have described a fourth

type of learning: adaptive flexibility, more commonly known as developmental learning.

Because *developmental learning* emerges from extensive experience and growth over

time, it is considered as a higher-order or developmental-learning ability. Unlike

learning style, which focuses on general preferences, and learning skill, which focuses

on specialized situational abilities, *developmental learning* describes the relatively

stable changes that occur as individuals learns to adapt to changing circumstances over time. Development describes how an individual learn to manage competing demands, and learns to deal with environmental complexity. Kolb and Wolfe (1981) provided examples of developmental learning: e.g., the engineer who utilizes planning and decision making in her work but quickly shifts modes to utilize caring and nurturing at home; or the actor/playwright who actively expresses deep emotions on the stage but moves to more reflective activities when writing. As these examples illustrate, developmental learning describe adaptation and flexibility in responding to changing environmental demands.

ELT and Cross-Cultural Learning

Taken together, abilities, styles, skills and development learning form the basis of experiential learning. Several unique aspects of ELT ensure its usefulness for theory construction related to cross-cultural learning.

First, as an integrative approach to learning, ELT embodies a comprehensive set of skills—including valuing, thinking, deciding, and acting—necessary for a variety of activities related to cross-cultural learning. Second, the humanistic values underlying ELT provide an ethical approach to learning that values difference, self-development, and self-actualization. These humanistic values emphasize the ability to learn and develop in the face of cross-cultural experiences and thereby place the expatriate, or similar learner, at the center of the cross-cultural learning process (see Kayes, 2002). Third, ELT has been subject to extensive empirical validation and so provides a means to develop testable propositions from the proposed taxonomy. Using the various measures of learning styles, skills, and development, ELT provides one of the few empirically verifiable learning theories. Thus, the integrative framework proposed in

this study can be verified empirically through existing or slightly modified

psychometrics instruments. Kolb and his colleagues have developed instrumentation

such as the learning style inventory (LSI), the adaptive style inventory (ASI), and the

learning skills profile (LSP) to measure learning style, development, and learning skills,

respectively.

The fourth reason to enlist ELT to understand cross-cultural learning lies in its

focuses on the interactive nature of person-environment in the learning process. As this

element deserves considerable attention, it is described in detail below.

A Person-Culture Congruence Theory of Learning

ELT emphasizes the interaction between person and environment and, thus,

provides a model to understand both the individual and his or her relationship to the

environment. This transactional approach to cross-cultural learning sheds new light on

more distinctly cultural taxonomies (e.g., Hofstede, 1993) to describe the role of the

individual learning as a process of adaptation to various cultures.

The interaction between home and host culture provides an alternative way to

understand to cross-cultural research by suggesting that specific learning strategies

might be necessary for expatriates in the face of particular cross-cultural learning

situations. To further develop the idea of a home-host culture interaction, we adapted

the person-job congruence model of ELT (Sims, 1983). Just as job effectiveness can be

described by the learning opportunities that arise between a person and the job

requirements, so too can cross-cultural learning be explained as the learning

opportunities that arise between two interacting cultures: the individual's home culture

and the host culture. The person-culture congruence model explains cross-cultural

learning as a function of the congruence between *personal competencies* acquired in

one's home culture and the *competencies* required by the host culture . The degree of congruence between a personal competency and the culture, and the degree to which a person is able to learn those competencies, is the degree to which effective cross-cultural adaptation can occur.

Figure 2 shows person-cultural congruence model of cross-cultural learning. The model depicts a graphic relationship between culture, competencies, learning and cross-cultural adaptation. We propose specific tests for this model later.

Insert Figure 2 about here

Expatriate Adaptation: An Integrative Review

The person-culture congruence model is consistent with competency approaches to managerial effectiveness. *Competency* denotes a catch-all term that describes the characteristics that lead to success at a job or task (Boyatzis, 1982: 21). Competency exists at several levels: traits, motives, self-image, social roles, skills, specific actions or behaviors, and environmental factors (Boyatzis, 1982: 35). The inclusive nature of the term competency as "success factor" makes it an appropriate term to classify the variety of factors used to describe cross-cultural learning.

To develop a classification of cross-cultural competencies we followed several steps, including identifying and sorting competencies from the literature into thematic clusters, matching and verifying the skills in relation to dimensions of ELT, eliminating clusters and validating the thematic clusters using inter-rater reliability sorting.

First, we conducted a comprehensive review of literature on cross-cultural learning. We focused on identifying competencies related to success in international business, including expatriates in multinational corporations, adult workers assigned to foreign countries, and young executives attending business schools who previously experienced overseas assignments. Because our approach was interdisciplinary, we paid special attention to obtain studies that represent a variety of methodologies and disciplines. This review identified 73 different skills, abilities, and competencies related to cross-cultural learning. The results of this review are found in Table 1.

Insert Table 1 about here

To make sense of this literature, each researcher categorized and sorted each of the 73 cross-cultural competencies identified from the literature review into thematic clusters using a Q-sort methodology. Boyatzis (1998) argued for the use of conceptual clustering rather than computer or statistical methods, such as factor analysis and cluster analysis, because conceptual clustering allows researchers to recognize anomalies in the data and to play an active role in the clustering. Working together, we decided on ten competency clusters. To determine the within-cluster fit of the various skills, we ranked each competency in the cluster with regard to its fit with the other competencies: Ratings were either "good," "OK," "indirect," or "general." This was an iterative process designed to determine (1) the fit or reliability of each competency with the general cluster and (2) the breadth or robustness of each cluster.

One cluster, Technical Job Skills and Knowledge, was eliminated because technical abilities were considered threshold abilities; that is, minimum standards for completing average performance (Spenser & Spenser, 1993). Threshold abilities are typically considered outside the scope of competency studies because they don't distinguish top performers from average performers and thus, they are not competencies at all but more akin to survival mechanisms than performance abilities. Such skills are described in the literature as technical skills (Cleveland, Mangone, & Adams, 1960); professional, technical, or manual skills (Byrnes, 1965); job competence (Stein, 1966); job ability factors (Hays, 1971); job skills (Hautaloma & Kaman, 1975); orientation to knowledge (Ruben & Kealey, 1979); technical competencies (Tung, 1981); technical expertise (Stone, 1991); and job knowledge and motivation (Arthur & Bennett, 1995; Sinangil & Ones, 1997).

Second, we examined each of the remaining nine clusters in relationship to Kolb's (1984) four learning modes (CE, RO, AC, and AE) along with the corresponding 12 learning skills. In this matching phase, the researchers looked for similarities between newly discovered clusters and the pre-existing ELT learning modes and skill categories. During this process we noticed that two clusters (Managing Stress & Adaptability and Flexibility) were not representative of any of Kolb's 12 previously defined learning skills but were similar to the developmental learning modes. These two clusters described higher-order flexibilities related to development. Third, we independently analyzed each of the remaining seven cross-cultural skill clusters for further categorization into subgroups within the ELT model. This parsing of the data was designed to identify fine-grained distinctions between skill sets. Because our research was hypothesis-generating in nature, we hoped such distinctions would guide

future research by creating narrowly defined constructs associated with specific regions

of the ELT model.

During this phase, a final title, as well as a behavioral, knowledge or skill base

and communication component were identified for each of the 9 competencies. Our

analysis revealed that several clusters were directly related to ELT dimensions (e.g.,

listening and observation, with RO), while other clusters were directly linked with 12

learning skills (e.g., human relationships were linked with relationships). We concluded

that ELT was an appropriate model to classify the cross-cultural skills clusters, but we

believed that the newly identified clusters were representative of a greater specificity

about the skills necessary for cross-cultural adaptation than the original 12 general skills

outlined by Kolb. The seven competency clusters in relationship to the dimensions of

experiential learning are presented in Figure 3.

Insert Figure 3 about here

Our final step was to achieve an initial level of empirical validation for the

clusters. We enlisted 24 entry and mid level managers, many of whom have had cross-

cultural work experience to complete a survey for initial support of the efficacy of our

clusters. The original list of 73 skills was narrowed to 53 items by eliminating those

items that were redundant, deemed too technical or filled with jargon, or were too

similar to the clusters titles (e.g. , Listening and Observation cluster and "listening"

skills). After a brief explanation of the study, the respondents were asked to place the

each of the 53 items into one of the 9 pre-defined clusters. We used a percentage of

agreement reliability measure for a variety of reasons: (1) the method was consistent with qualitative competency research; (2) the data was nominal; (3) the clustering was done based on the number of times an items was present or not present during coding; (4) the sample size was too small to effectively use advanced statistics such as cluster analysis (Boyatzis, 1998).

Interrater agreement with our initial clusters ranged from 87 % for Building Relationships, to 97 % for Managing Stress. Although the initial results seemed promising, respondents agreed with our classification less than 65 % of the time on 17 of the items. This suggests that while there was initial support for our theoretical clusters, there may be strong agreement as to cluster category on certain items and less agreement on others. We address the limits of our conceptual clusters and suggest directions for future research in the final section of this paper.

Cross-Cultural Learning Competency Taxonomy

Table 2 summarizes the name, behavior, knowledge or skill, and communication elements for each of the 9 cross cultural competency clusters. In this section, we describe the conceptual and research basis for the 9 cross-cultural competencies and their relationship to the four learning skill dimensions, as well as the two adaptive competencies.

Insert Table 2 about here

Interpersonal Skills

Building relationships with others.

The first cluster consists of competencies related to fostering and developing human relationships: dealing with people (Byrnes, 1965), developing relationships with locals and colleagues (Stein, 1966), possessing relational skills or abilities (Arthur & Bennett, 1995; Hays, 1971; Sinangil & Ones, 1997), not being solely task-oriented (Ruben & Healey, 1979), not being self-centered (Ruben & Kealey, 1979), building relationships (Hawes & Kealey, 1979, 1981; Ratiu, 1983), being oriented outside oneself (Kealey, 1989), possessing social adroitness (Kealey, 1989), possessing social orientation (Black, 1990), having skill at conflict resolution (Black, 1990), resolving inter-member conflicts (Black & Porter, 1990), building interpersonal relationships (Stening & Hammer, 1992), possessing interpersonal skills (Clarke & Hammer, 1995; Cui & Awa, 1992), having affiliates and friends (Dunbar, 1992), being cooperative (as opposed to overly competitive) (Tung, 1998), and being sociable (Caligiuri, 2000).

Valuing people of different cultures.

Past research illustrates that the caring for, respecting, and understanding people of different cultures comprises an important component of intercultural learning. These competencies have been described as cultural empathy (Cleveland, Mangone, & Adams, 1960; Stoner, Aram, & Rubin, 1972; Cui & Van Den Berg, 1991; Cui & Awa, 1992), sense of humor (Stoner, Aram, & Rubin, 1972), courtesy (Harris, 1973), interpersonal respect (Hawes & Kealey, 1979), respect (Hawes & Kealey, 1981; Ruben & Kealey, 1979), intercultural sensitivity (Hawes & Kealey, 1979), sensitivity to host country (Hawes & Kealey, 1981), caring (Kealey, 1989), extra-cultural openness (Arthur &

Bennett, 1995; Sinangil & Ones, 1997), and greater sensitivity to needs of others (Tung, 1998). Boyatzis and Kolb (1991) demonstrated an empirical relationship between the CE mode and the skills related to the clusters of *Building Relationships* and *Valuing People of Different Cultures*.

Information Skills

Listening and observation.

Listening and observation were described in four studies on cross-cultural learning: listening skills (Hawes & Kealey, 1979, 1981), adoption of a listening mode (Tung, 1998), and observation and listening (Ratiu, 1983). These competencies relate to the RO mode. The RO learning mode calls for understanding the meaning of ideas and situations by carefully listening and watching. Kolb et al. (1981) reported that listening skills were empirically significantly correlated with the RO mode (Kolb, 1984).

Coping with ambiguity.

Understanding of ambiguous or unpredictable situations forms another cluster of cross-cultural competencies identified in the literature. These competencies include abilities to cope with ambiguity in personal relations (Hautaloma & Kaman, 1975), tolerance of ambiguity (Ruben & Kealey, 1979), ability to deal with unfamiliar situations (Dean & Popp, 1990), ability to make sense of new experiences (Ratiu, 1983), and understanding of non-verbal communication (Dunbar, 1992). This cluster of skills constitutes RO abilities, as dealing with ambiguity and making sense of unstructured and unpredicted situations requires patience, impartiality, and thoughtful judgment, as well as the ability to reflectively observe large amounts of new and seemingly disparate data.

Analytic Skills

Translating complex information into another language.

Research supports the use of communication and language competencies as essential for cross-cultural learning. Such competencies include language skills (Hautaloma & Kaman, 1975), communication (Stening & Hammer, 1992), willingness to communicate (Black, 1990), communication competence (Cui & Van Den Berg, 1991), communication behavior (Cui & Van Den Berg, 1991), understanding of host-country language (Dunbar, 1992), English-language skills (Ishida, 1992), and language fluency (Shaffer, Harrison, & Gilley, 1999). Although communication involves interpersonal aspect (face-to-face) as a medium of information exchange, Ishida (1992) discovered that analytical skills are important for the effective performance of expatriates in foreign assignments. Thus, effective cross-cultural communication and language essentially require the translation of concepts, ideas, or thoughts into a verbal form that is socially acceptable. We concluded that translating complex information into another culture was primarily a language competency and theoretically associated with the AC mode of learning (Kayes, 2002).

Action Skills

Taking action and initiative.

Several studies identify action and initiative skills as having a positive impact, whereas one study (Clarke & Hammer, 1995) reported a negative impact on learning. As a positive effect, the action and initiative skill set includes not being passive (Thomson & English, 1964), changing bad situations (Hautaloma & Kaman, 1975), taking risks (Ratiu, 1983), being action-orientated (Kealey, 1989), taking initiative

(Dunbar, 1992; Hawes & Kealey, 1979, 1981), and exhibiting an extraversion orientation (Parker & McEvoy, 1993). Ishida (1992) also reported that decision skills are essential for effective performance.

The action and initiative skills cluster describes how people to actively engage with an intercultural situation. This orientation relates to the AE learning mode, which involves the ability to actively affect people and influence situations. In the AE mode, individuals willingly take risks in order to complete their objectives. Extraversion, reported by Parker and McEvoy (1993), is also conceptually and empirically related to the AE mode (Kolb, 1984; Margerison & Lewis, 1979). The AE learning mode is also significantly associated individually with action and initiative skills (Boyatzis & Kolb, 1991; Mainemelis, Boyatzis, & Kolb, 2002).

Managing others.

Three studies reveal that management and administrative job skills are related to cross-cultural learning. Studies identify many management skills: organizational skills (Cleveland, Mangone, & Adams, 1960), maintenance of a close-knit organization (Black & Porter, 1990), and general management (Ishida, 1992). Two studies have pointed to interaction skills: interaction posture (Ruben & Kealey, 1979) and interaction with host country (Black & Gregersen, 1991). Like the human relationships competency cluster, interaction and management emphasize action orientation more significantly than the relationship skills. The management skills relate to action skills and the AE mode. Again, the AE mode calls for actively affecting people and emphasizes both practical applications and pragmatic approaches. Those working in the AE mode are willing to take responsibility for accomplishing tasks. Both Gypen (1980) and Kolb et al.

(1981) report empirical relationships between management skills and the AE mode of learning.

Developmental Learning

Two additional clusters fit directly into the category of developmental learning competencies because they suggest a general ability to adapt to the multiple environmental demands of cross-cultural change. Unlike the previous seven skill clusters, which involve the specialization of one or two modes of learning, developmental competencies entail the integration of multiple learning skills. Developmental learning constitute higher-order adaptive competencies because they demonstrate an ability to respond to multiple circumstances, to exert flexibility in learning style, and to move out of one's preferred mode of learning.

Adaptability and flexibility.

Adaptability and flexibility are regarded as important abilities for expatriates' successful adaptation. These competencies have been described in research as flexibility-rigidity (Stoner, Aram, & Rubin, 1972; Thomson & English, 1964), interpersonal flexibility (Hawes & Kealey, 1979, 1981), ability to adapt (Stone, 1991; Tung, 1981), cultural flexibility (Black, 1990), flexibility as a personality trait (Cui & Awa, 1992), and flexibility/adaptability (Arthur & Bennett, 1995; Sinangil & Ones, 1997).

Managing stress.

Stress management skills constitute the ability to deal with the tensions inherent in complex learning situations. Recall that ELT describes a process of resolving dialectically opposed demands, such as thinking versus feeling, or action versus

reflection. Being immersed in a foreign culture can create high-tension experiences; the ability to manage or deal with these experiences is an essential skill for learning in the face of these demands. This cluster of skills has been described in the literature as emotional maturity to tolerate stress, depression, and loneliness (Stein, 1966; Hautaloma & Kaman, 1975); self-control under stress (Hawes & Kealey, 1979); stress management (Hawes & Kealey, 1981; Stening & Hammer, 1992); and dealing with stress (Dean & Popp, 1990; Ratiu, 1983). This cluster involves an internal capacity for dealing with stressful situations to make sense of them, to control one's reaction to them, and to remain patient for an outcome. Other emotional management abilities are also contained in this cluster, such as a tolerance of depression and loneliness (Hautaloma & Kaman, 1975).

Propositions

The cross-cultural learning typology presented here extends ELT by identifying the specific competencies associated with cross-cultural adaptation. Our analysis revealed several specific insights into the nature of cross-cultural learning. This section expresses these findings as propositions.

Nature of Cross-Cultural Learning

The first finding is related to the nature of cross-cultural learning. The categorization of cross-cultural competencies into nine competency clusters suggests that cross-cultural learning involves three interrelated types of competencies: (1) seven specific adaptive competencies conceptually or empirically related to the dimensions of ELT, (2) two specialized adaptive competencies related to the higher-level

developmental abilities, and (3) threshold competencies which define the minimum requirements to perform a job.

Thus, Proposition 1 suggests a specific relationship between learning style, the two adaptive flexibility clusters, and the seven cross-cultural competency clusters, as well as between learning style, adaptive competencies, and adaptive style.

Proposition 1a: Cross-cultural learning competencies are positively related to corresponding dimensions of experiential learning theory. Figure 3 displays the specific hypothesized relationships.

Proposition 1b: Learning style is positively related to the seven cross-cultural competency clusters, so that each dimension of learning style (CE, RO, AC, and AE) is positively related to the interpersonal, information, analysis, and action skill sets, respectively.

Proposition 1c: Higher overall scores on developmental learning (as measured by the ASI) will be positively related to higher levels of *adaptive flexibility* and *stress management* competencies.

Person-Culture Congruence

The second set of propositions relate to the person-culture congruence model described earlier; the model suggests that effective cultural adaptation requires a fit between host and home culture and their related competencies. The importance of this fit is supported by the cross-cultural and expatriate studies (Deller, 1997; Hannigan, 1990; Harris, 1975; Searle & Ward, 1990; Tung, 1981; Ward & Chang, 1997). Tung (1981), for example, found that expatriates' selection in accordance with different situational environments results in the lowest failure rates of expatriate assignments. This argument supports a relationship between one's home culture and the

competencies that one has developed, as well as the transferability of specific competencies to other cultures.

Proposition 2a: The personal competencies held by a manager are directly related to the competencies supported by that person's home culture.

Proposition 2b: The cross-cultural competencies necessary for successful adaptation to a new culture are directly related to the competencies supported by the host culture.

Proposition 2c: Effective cross-cultural adaptation results from the congruence between the person and the culture, so that a large difference between host and home culture will result in low levels of effective cultural adaptation, and small differences between host and home culture will result in high levels of effective cultural adaptation.

Skills for Successful Cross-Cultural Adaptation

The third proposition relates to findings about the skills most related to successful cross-cultural adaptation. Our study revealed that three ELT competencies—CE, AE, and RO—are generally critical for cross-cultural adaptation, regardless of the particular host or home country. The literature we reviewed suggests that societal, intercultural, and human skills may be more important than quantitative, rationality, and analysis skills. Ratiu's (1983) study concluded that the most adaptive manager tends to learn from his or her experience through proximate, specific situations. It can be concluded from this finding that those competencies associated with interpersonal skills and building human relationships (e.g., CE skills) may be of primary importance successful cross-cultural learning. Such findings motivate the third proposition, which focuses on the centrality of CE experiences for cross-cultural learning.

Proposition 3: Competencies associated with the concrete experience mode of learning, specifically *building relationships* and *valuing people of different cultures*, will be stronger predictors of effective cross-cultural adaptation.

Cross-Cultural Learning and Experiential Learning Theory

The next proposition relates to experiential learning theory. Learning style is described as a function of five forces: psychological type, educational specialization, professional career, current job, and adaptive competencies. Although a number of these forces pertain to environment, they describe a person's local environment—focusing on the environment with which one is in direct contact. However, culture, on a more macro environmental level, provides another potential force that shapes learning style.

Multiple studies of cross-cultural learning and ELT support the notion that learning styles may vary from one culture to another (Algee and Bowers, 1993; Auyeng & Sands, 1996; Hanpol, 1987; Hayes & Allinson, 1988; Hoppe, 1990; Katz, 1988; McMurray, 1998; Rhodes, 1990; Ruksasuk, 2000; Sanders, 1988; Yuen & Lee, 1994). These studies point the way for future research to identify the specific relationships between learning dimensions and various aspects of international cultures (Yamazaki, 2002). Although there is some evidence that competencies may be culture specific, there is evidence of some general relationships between various cultures and competency development (Clarke & Hammer, 1995). Clearly, further research is necessary to parse these distinctions; however, this fourth proposition supports a general relationship between learning dimensions and culture.

Proposition 4: Dimensions of learning, as defined by the ELT, are related to culture such that learning styles within a particular culture will be more alike than will

those learning styles from different cultures. That is to say, learning styles will converge within and vary between cultures.

Implications for Theory and Research

This final section outlines several implications for theory and research on cross-cultural management learning theory, pedagogy, and practice. The primary implication focuses on shifting from teaching about culture to developing skills to manage across cultures. The former focuses on abstract knowledge where the later focuses on developing interpersonal skills and increasing awareness in self and others.

Implications for Pedagogy

Our review revealed that interpersonal skills, those most closely related to CE, may be the most important skills related to effective learning in the face of a new culture. This proposition supports of Goleman's (1998) notion of emotional intelligence, which suggests that work-related success hinges less on analytical abilities and more on interpersonal understanding. The finding that interpersonal skills repeatedly appear as indicators of success suggests that when learning from cross-cultural experiences, cultivating and understanding human relationships is more important than abstract knowledge.

Methods for developing cross-cultural learning skills include assessment of individual commitments and values (Kayes, 2001), emotion and skill development (Mainemelis, Boyatzis, & Kolb, 2002), and immersion in different and challenging cross-cultural situations (Mintzberg & Gosling, 2002). These experiential approaches are not simply tangential to conceptual approaches; they are a primary component of cross-cultural learning. Action learning may provide another approach. Action learning (Marquardt, 1999) focuses on solving organizational problems through the use of

learning teams. When done in a cross-cultural environment, action learning exposes individuals in problem-solving that requires understanding diverse cultures.

Critical pedagogy (Dehler, Welsh, & Lewis, 2001) provides another method to develop cross-cultural learning because it facilitates questioning of cultural assumptions and opening up to new ways of doing things – a prescription for cross-cultural learning. Critical pedagogy is just beginning to produce practical application in organizations (see Vince, 2003); cross-cultural learning seems a good place to further apply these insights. Because critical approaches emphasize questioning assumptions and coming to terms with one's social, historical, and political context, individuals can begin to understand their own cultural in relationship to new experiences with new cultures.

Implications for Theory and Research

Communication and Cross-Cultural Adaptation.

One discovery we made during our study was the continual mention of communication as an important skill for cross-cultural adaptation. At first, communication appeared to deserve a category of its own. Further investigation revealed that communication was not just a tangential activity, but rather an integral part of each competency cluster. We propose that communication is a dimension of each competency cluster and essential for demonstrating competency in cross-cultural learning. Our work departs from traditional research by positioning communication as defining element of each competency, thus suggesting an integration of communication and competency research.

The taxonomy of learning skills provided here offer a framework for future research on the skills necessary for cross-cultural learning as well as for exploration of the relationship between cross-cultural skills and experiential learning. Instrumentation

presently exists to validate the model of cross-cultural learning proposed here. For example, the Learning Style Inventory and the Adaptive Skills Inventory act as general indicators of personal learning and adaptive competencies, respectively, while the Learning Skills Profile provides a method to identify basic skills related to cross-cultural development.

Future research should be directed towards identifying links between learning dimensions and various cultures. Yamazaki's (2003) typology of cultures describes cultural differences based on ELT. For example, a manager whose from Japan, a culture whose primarily values are in CE, begins to work in a new host culture such as the United States, where abstract knowledge (AC) is more valued. This manager will need to develop more AC skills (Linowes, 1993).

We have presented a typology of nine cross-cultural skills associated with effective cross-cultural learning. Guided by research and theory on experiential learning, these nine skills form a comprehensive, holistic model of cross-cultural learning. This framework offers to guide future research on cross-cultural adaptation and to prepare future managers for the imperative of cross-cultural work. Ultimately, what is needed is a new direction for developing managers to be successful in a cross-cultural work environment. By focusing on skills necessary for successful cross-cultural learning rather than abstract knowledge, we propose the future of cross-cultural learning move beyond identifying the technical requirements of a job, and by identifying those skills that lead to learning.

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Table 1

Review of Success Factors for Expatriate Adaptation to a New Culture

Authors	Subject & Sample Size	Home	Host	Significant Skills and Abilities
Cleveland, Mangone, & Adams (1969)	Adult workers N = 244	U.S.	Mexico, Japan, Indonesia, Iran, Yugoslavia, Ethiopia	Technical skills Brief in mission Organizational skills Sense for politics Cultural empathy
Thomson & English (1964)	Peace Corps N = 32	U.S.	Africa, Latin America, Asia	Flexibility-rigidity Not passive (approach and talk with people to initiate new projects)
Byrnes (1965)	Technical assistance N = 34	U.S.	Diverse	Dealing with people Professional, technical, or manual skills
Stein (1966)	Peace Corps N = 56	U.S.	Columbia	Job competence Relationships with locals & colleagues Emotional maturity to tolerate stress, to work alone or under pressure, to cope with unusual difficulties
Hays (1971)	Expatriates N = 51	U.S.	Mexico	Job ability factors Relational abilities
Stoner, Aram, & Rubin (1972)	Managerial technical assistance N = 51	U.S.	Africa	Cultural empathy Creativeness Sense for politics Flexibility-rigidity Sense for humor
Harris (1973)	Peace Corps N = 53	U.S.	Tonga	Perseverance Patience & tolerance Courtesy Reliability
Hautaloma & Kaman (1975)	Peace Corps N = 18	U.S.	Afghanistan	Language skills Job skills Abilities to use humor A tolerance of depression and loneliness Abilities to change bad situations Abilities to deal with bureaucratic systems Abilities to cope with ambiguity in personal relations

Hawes & Kealey (1979)	Technical advisers and their spouses N = 250	Canada	Afghanistan, Haiti, Kenya, Pakistan, Peru, Senegal	Interpersonal skills (interpersonal flexibility, interpersonal respect, listening skills, relationship building, self-control under stress, and intercultural sensitivity) Self-assertion skills (initiative, self-confidence, and frankness)
Ruben & Kealey (1979)	Technical advisers and their spouses N = 13	Canada	Kenya	Respect Interaction posture Orientation to knowledge Not task-orientation Not self-centered Interaction management Tolerance of ambiguity
Hawes & Kealey (1981)	Technical assistants N = 117-159	Canada	Africa, Asia, Latin America	Interpersonal skills (interpersonal flexibility, interpersonal respect, listening skills, relationship building, self-control under stress, and sensitivity to host) Self-assertion skills (initiative, self-confidence, and frankness)
Tung (1981)	Vice president of foreign operations N = 80	U.S.	Europe, Canada, Latin America, Asia, Africa	Abilities to adapt a different physical or cultural environment Emotional immaturity Abilities to cope with large responsibilities Technical competencies
Ratiu (1983)	MBA students of overseas working experience N = 250	Diverse	Diverse	Observation and listening Risk-taking Relation with people Deal with stress Make sense of new experience
Kealey (1989)	Technical advisers N = 89 and 188	Canada	Africa, Asia, Latin America, Caribbean	Caring Action-orientation Out-of-self orientation Self-monitoring Social adroitness Low security needs Low need for upward mobility
Black (1990)	Expatriates N = 67	Japan	U.S.	Cultural flexibility Social orientation Willing to communicate Conflict resolution
Black & Porter (1990)	Expatriates N = 57	U.S.	Hong Kong	Integration (maintain a closely knit organization) Resolve inter-member conflicts

Dean & Popp (1990)	Expatriates N = 61	U.S.	Saudi Arabia	Working effectively with other people, dealing with unfamiliar situations, dealing with stress, dealing with communication misunderstandings, dealing with changes in life styles
Dean & Popp (1990)	N = 31	France	U.S.	Working effectively with other people, dealing with unfamiliar situations, dealing with communication misunderstandings, dealing with changes in life styles, entering meaningful dialogue
Black and Gregersen (1991)	Expatriates N = 220	U.S.	Korea, Japan, Hong Kong, Taiwan	Interaction with home for work adjustment Interaction with host for interaction and general adjustment
Cui & Van Den Berg (1991)	Expatriates N = 257	U.S.	China	Communication competence Cultural empathy Communication behavior
Stone (1991)	Expatriates N= 53	Australia, New Zealand UK, U.S., France Canada	South Asia	Ability to adapt Abilities to cope with large responsibilities Motivation to work overseas Technical expertise
Stening & Hammer (1992)	Expatriates N = 193 N = 62 N = 36	Japan, U.S., U.S.,	Thailand, U.S., Japan Thailand	Stress management Communication Interpersonal relationships Stress management Communication Interpersonal relationships
Cui & Awa (1992)	Expatriates N = 74	Diverse	China	Personality traits (patience, flexibility, empathy, tolerance) Interpersonal skills Social interaction Managerial abilities Cultural empathy
Dunbar (1992)	Repatriated staff N = 149	U.S.	Europe and others	Cultural skills (understanding host country language, understanding non-verbal communication, having affiliates and friends, interest in host culture, engagement in enjoyable tasks) Initiative

Ishida (1992)	Expatriate president N = 20	Japan	Diverse	General management Decision-making Good health Balanced sense Good mood Perseverance Belief in mission Flexibility English language skills Analytical abilities
Parker & McEvoy (1993)	Adult workers N = 169	Diverse	Diverse	Extraversion (for interaction adjustment)
Clarke & Hammer (1995)	Managers and spouses N = 40	U.S.	Japan	Interpersonal skills Lower level of initiative/self-confidence Self-assertion skills
Arthur & Bennett (1995)	Expatriates N = 338	Diverse	Diverse	Relational skills Flexibility/adaptability Extra-cultural openness Job knowledge & motivation
Sinangil & Ones (1997)	Expatriates N = 220	Diverse	Turkey	Relational skills Flexibility/adaptability Extra-cultural openness Job knowledge & motivation
Tung (1998)	Expatriates and spouses N = 409	U.S. Canada	Diverse	Adopt a listening mode Greater sensitivity to needs of others Cooperative as opposed to overly competitive Espouse an inclusive leadership styles Compromising rather than domineering
Shaffer, Harrison, & Gilley (1999)	Expatriates N = 452	Diverse	Diverse	Language fluency for interaction adjustment
Caligiuri (2000)	Expatriates and inpatriates N = 143	U.S.	Diverse	Sociability Ability to speak Contact and openness (moderator)

Note. (1) Three researches such as Thomoson & English, Tung (1981), and Stone concern the

factors of failure or early return, so the skills and abilities described here are reversed to their originals.

(2) Items of skills and abilities studied by Harris, Dean & Popp, Ishida, and Tung (1998) are described as

the most effective ones (Harris), the five most important ones (Dean & Popp; Tung), and the ten most

important elements (Ishida).

Table 2

Competencies for Successful Cross-cultural Adaptation for Expatriates.

Learning Skill Dimension	Cross-cultural Competency Cluster	Behavioral Indicator	Knowledge or Skill Required	Communication Ability
Interpersonal	(1) Building Relationships	Interacts with other regularly, particularly members of the host culture	Ability to gain access to and maintain relationships with members of host culture	Recognizes and deals effectively with misunderstandings, a willingness to maintain contact with people even when communication is difficult
	(2) Valuing People of Different Cultures	Expresses interest and respect for host culture, including its history, customs, beliefs and politics	Empathy for difference, sensitivity to diversity	Initiates and engages in open conversation with friends and colleagues about host culture
Information	(3) Listing and Observation	Spends time observing, reading about and studying host culture, particularly with locals	Knows cultural history and reasons for certain cultural actions and customs	Asking questions, when possible, takes careful account of situations before taking action
	(4) Coping with Ambiguity	Maintains work habits in the face of unexpected events, new experiences, or unfamiliar situations	Recognizes and interprets implicit behavior, especially non verbal cues	Changes communication in response to non-verbal cues from others
Analytic	(5) Translating Complex Information	Translates personal thoughts into language	Knowledge of local language, symbols or	Demonstrates fluency in language host country

		of host culture	other forms of verbal language and written language	
Action	(6) Taking Action and Initiative	Takes action when appropriate, even when outcome is uncertain	Understands intended and potentially unintended consequences of actions	Easily approaches and interacts with strangers
	(7) Managing Others	Takes responsibility for accomplishing tasks related to the organizational goals	Ability to manage details of a job including maintaining cohesion in a group	Communicates implications of individual actions to others in the organizations
Adaptive	(8) Adaptability and Flexibility	Demonstrates acceptance of change, set backs and challenges	Views change from multiple perspectives	Can explain perspectives on a single issue
	(9) Managing Stress	Maintains work habits during times of personal and environmental crisis, or in the face of heavy emotional demands	Understands own and other's mood, emotions and personality	Expresses personal feelings in an appropriate and not threatening way

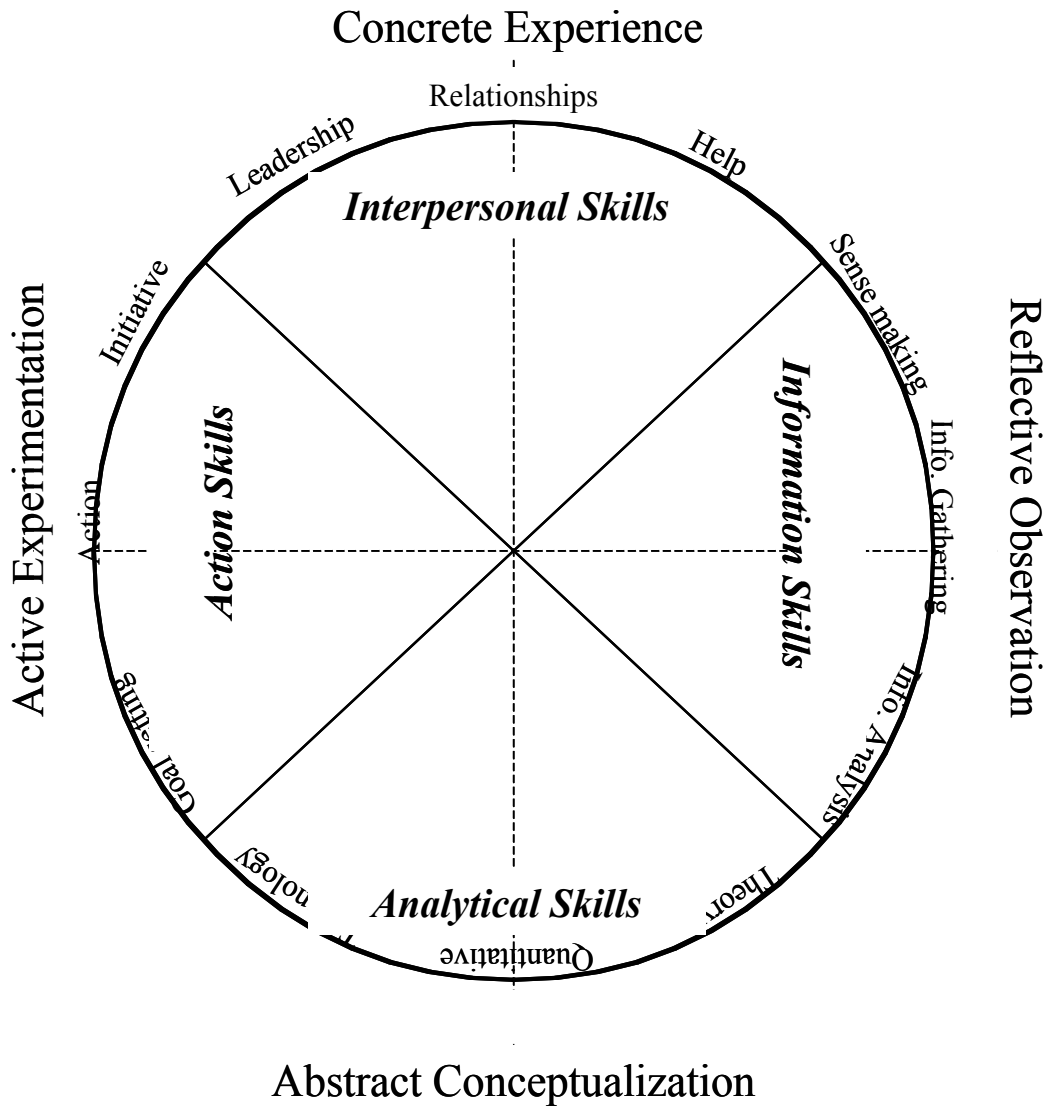*Figure 1.* Experiential learning dimensions and learning skills.

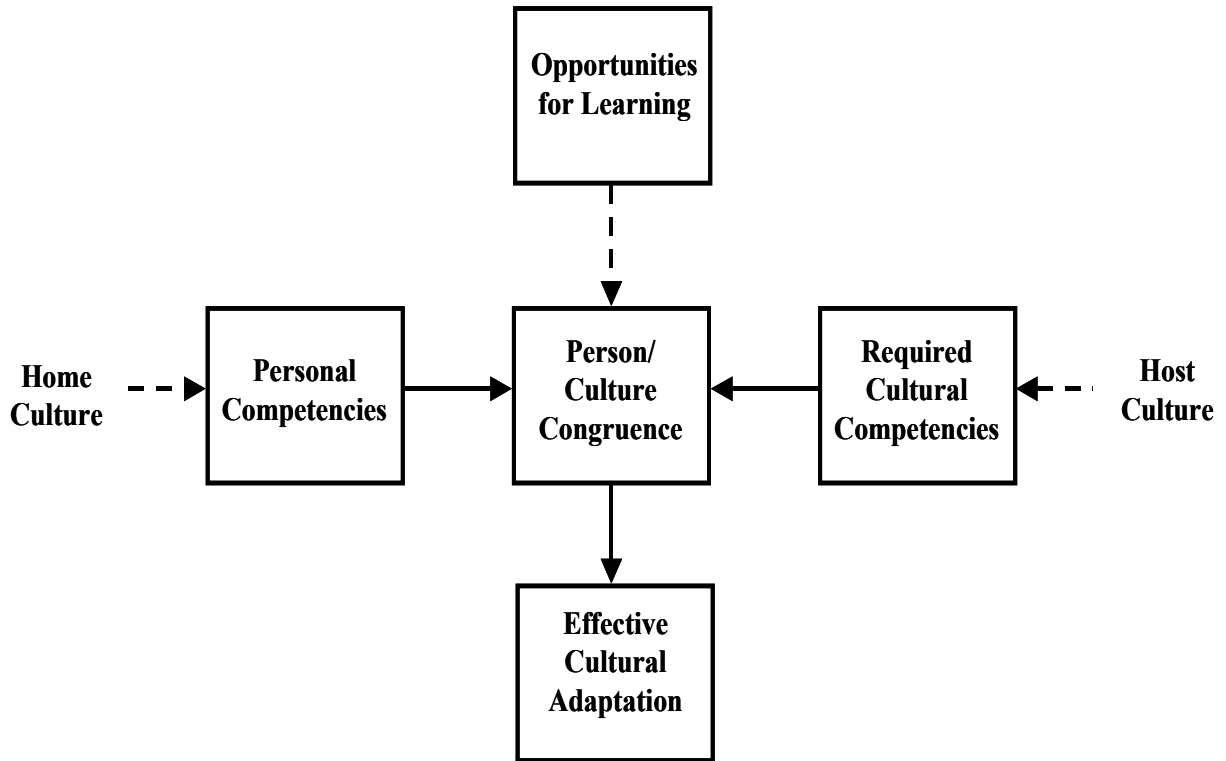*Figure 2.* Person-culture congruence model of cross-cultural learning.

Figure 3. Experiential model of cross-cultural learning skills.