

**Cross-Cultural Social Intelligence: An Assessment for
Employees Working in Cross-National Contexts**

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Abstract

Purpose – To discuss (a) the concept of cross-cultural social intelligence (CCSI), (b) its relevance for both selecting and developing expatriates and other employees working in cross-cultural contexts, (c) the development of a situational judgment test to assess CCSI, and (d) practical “lessons learned” in each of these areas. In addition, this instrument is offered (free-of-charge) to any interested managers or HR practitioners.

Design/methodology/approach – The four phases of the development and validation of the CCSI measure (using a total of 184 cross-cultural SMEs) were developing (a) the scenarios and (b) the response alternatives, (c) the content analysis, and (d) establishing construct validity.

Findings – The results from the content analysis and construct validation provide support for the use of the CCSI in cross-cultural situations.

Research limitations/implications – The CCSI has not yet been validated in a criterion-related way (i.e., based on relations to job performance). This should be done before using for selection.

Practical Implications – Possible uses for the CCSI in organisations include selection and/or promotion of expatriates and other employees in cross-cultural contexts and several types of training and development initiatives.

Originality/value – Despite the expressed need for instruments of this sort, nothing similar currently exists (especially not a theoretically-grounded and empirically sound instrument). In addition, the “lessons learned” provide practical advice to others engaged in similar undertakings.

Keywords: Cross-cultural skills, Social intelligence, Situational judgment tests, Employee assessment and selection, expatriates

Paper type: (Combination)

Cross-Cultural Social Intelligence: An Assessment for Employees Working in Cross-National Contexts

The world's economy continues to globalize at a rapid rate. More and more organisations are breaking down national geographical boundaries, opening new markets and hiring employees of varying cultural backgrounds in the process. As managers and HR practitioners know all too well, this globalization presents real challenges for organisations in terms of finding and/or developing employees who can effectively function across cultures (or, in our words, employees who have cross-cultural social intelligence, CCSI). In response to this need, we have developed a comprehensive situational judgment test of CCSI (which the first author undertook as her dissertation, under the direction of the second and third authors). Its development involved a large number of multi-cultural content experts (from a number of countries around the world), and it was submitted to an intensive content validation from a separate group of multinational experts. The final result is an instrument that includes a comprehensive array of in-depth cultural scenarios that test one's CCSI, and is supported by both content and construct validity evidence.

The current paper discusses the nature of the CCSI construct, its relevance to expatriate populations as well as to other employees who work "across cultures," the development of the situational judgment test that assesses CCSI, evidence for the validity of the instrument, the instrument's potential usefulness for both selecting and training/developing expatriates and other employees, and finally the sharing of practical "lessons learned" in these areas. In terms of specific contributions to a practitioner audience, it is not our intent to use this paper to educate such an audience regarding the importance of selecting and developing employees who can successfully work in cross-cultural contexts. Indeed, practitioners are already keenly aware of

this (as indicated in the GMAC (2004) report). Rather, our intent is to provide more specific guidance in this task by informing the reader about a specific construct (CCSI) and a specific tool available for doing so. To that end, the primary contributions to practitioners of this paper include (a) an introduction to the CCSI construct (because this represents a marriage of two relatively disparate literatures, those on social intelligence and cross-cultural communication, we thought it likely that practitioners might generally not be familiar with this construct); (b) a summary of the steps involved in creating a cross-cultural situational judgment test (Although there is currently plenty of general test development guidance in the literature, there is less available on the specifics required for constructing either situational judgment tests or cross-cultural instruments in general, let alone a detailed explication of the steps involved in creating a cross-cultural situational judgment test. It is hoped that the details herein might serve as a good template for practitioners undertaking similar endeavors.); (c) an explicit invitation to use and adapt the CCSI measure (we discuss several potential uses of the instrument at the conclusion of the paper and offer it to interested practitioners free-of-charge); and finally (d) practical recommendations regarding the development of cross-cultural instruments in general.

The Relevance of CCSI

The free-economy of the 1980`s has literally taken on global proportions as the increase in international ventures continues to rise (GMAC, 2004). This increase in the number of companies who operate in more than one country has brought new meaning, among other things, to the term “company transfer.” No longer are employees restricted to in-country transfers (e.g., Los Angeles to New York), but cross-nation transfers (e.g., Los Angeles to Amsterdam) are also increasingly likely. In addition, more and more customer service-oriented jobs are being sourced from outside of the country being serviced (Brady, 2003; Doke, 2003; Shenn, 2003). For

example, a customer service employee located in India could just as easily receive calls from Germany, Spain, or the United States as they could from within India. This rapid growth in the number of employees who work in a cross-national context (e.g., expatriates, their co-workers, and employees who service international clientele) necessitates a greater focus on the concept of cross-cultural skills, or cross-cultural social intelligence (CCSI).

The concept of CCSI is relatively new, and as such, this construct has not been adequately defined nor empirically researched. Only a few investigations of a related, yet different, construct in application to organisational settings have been conducted (see Earley, 2002, and Offerman & Phan, 2002 for more about cultural intelligence). Accordingly, the initial focus of the current paper is to detail the theory behind CCSI and the development of a measure to assess CCSI that is carefully grounded in that theory. Following that, we discuss practical implications, in terms of potential uses of this instrument and “lessons learned” in the course of this work.

The Theory of CCSI

The construct of CCSI that we define in this paper as important for performance in multinational contexts is grounded in three separate propositions. First, CCSI is presented as an extension of *social intelligence*, which encompasses the more narrow concept of emotional intelligence (Bar-On, 2000) and has been defined as “the ability to understand the feelings, thoughts, and behavior of persons, including oneself, in interpersonal situations and to act appropriately upon that understanding” (Marlow, 1986, p. 52). Socially intelligent persons are able to easily adapt their behavior to a variety of social situations (Cantor & Kihlstrom, 1987). Second, this extension is based on the belief that social intelligence is culturally-bound (Cantor & Kihlstrom, 1987), and that because cultures differ (Mesquita, 2001; Nicholson & Stepina,

1998; Triandis, 2000), social intelligence cannot adequately explain effective interpersonal behavior *across* cultures (Earley, 2002). Third, the effectiveness of CCSI is judged with regard to two dimensions (empathy and non-ethnocentrism) derived from the social intelligence (e.g., Brown & Anthony, 1990; Keating, 1978; Lee, Wong, Day, Maxwell, & Thorpe, 2000; Thorndike & Stein, 1937) and cross-cultural (Enfield, 2000; Ellingsworth, 1988; Gudykunst, 1988; Hofstede, 1980; Javidan & House, 2001; Redmond, 2000; Roth, 2001; Triandis, 2000) literatures.

In short, CCSI as defined and measured in the current paper is a marriage of what is known about social intelligence and culture. It includes the abilities to (a) recognize and understand (non)verbal cues of persons from a variety of cultures, (b) make accurate social inferences in a variety of cultural encounters, and (c) accomplish relevant social objectives across cultural negotiations and interactions through one's acceptance and understanding of other cultures. As such, and as confirmed in the construct validation phase (reviewed later), CCSI is an amalgam of *knowledge* (i.e., of differences among cultures); *skills and abilities* (interpersonal and empathy-based; these are generally thought of as more stable abilities, but they can also be conceptualized as skills in the sense that they can be improved via development efforts and likely increase with greater cross-cultural experiences); and *other characteristics* (e.g., a non-ethnocentric attitude, openness to changes in one's own typical interpersonal responses).

Based on the cross-cultural communication and social intelligence literatures, there are two dimensions believed to underlie CCSI: ethnocentrism and empathy. The ethnocentrism dimension measures the extent to which a person is judgmental of other cultures and is unwilling or unable to implement culturally relevant solutions. According to the cross-cultural communication literature (DiStefano & Maznevski, 2000; Ellingsworth, 1988), ethnocentrism is

a critical barrier to intercultural communication. Ethnocentric persons use culture-based stereotypes, do not adapt their communication style (Ellingsworth, 1988), and are not open to incorporating information and customs of other cultures.

The empathy dimension of CCSI measures the extent to which a person can relate to others and regulates his/her behavior based on another person's behavior. Empathy has been identified as a key element of social intelligence (e.g., Marlowe, 1986). Empathetic persons convey through their behavior or words that they understand what another person is feeling, and they act appropriately towards that understanding (Marlowe, 1986). Persons high in CCSI would therefore possess both empathetic and non-ethnocentric qualities.

The Measurement of CCSI

The rationale behind the components of the instrument that measures CCSI and the development of this instrument are briefly summarized in each of the following sections (see Table I for an overview of each of the phases of test development).

“take in Table I”

Situational Judgment Test

Due to the “social” aspect of CCSI, a format that allowed interaction-based judgments to be portrayed was thought to be most appropriate for measuring this construct. Therefore, the situational judgment test (SJT; see Born, van der Maessen, & Van der Zee, 2001, and McDaniel, Morgeson, Finnegan, Campion, & Braverman, 2001) was selected as the means by which CCSI would be measured. SJTs are broadly defined as any paper-and-pencil test designed to measure judgment in work settings, usually by describing a scenario and having the respondent identify the appropriate response from a list of alternatives (McDaniel et al., 2001). The psychometric qualities of the SJT method are quite sound. Reliability coefficients (alpha) for these types of

instruments range from .55 (not using a construct-based approach, Chan & Schmitt, 1997) to .91 (using a construct-based approach, Born et al., 2001). In addition, previous research has shown it to be a valid method of testing (e.g., Hanson, Horgen, & Borman, 1998; Ployhart & Ryan, 2000; Weekley & Jones, 1997). McDaniel et al.'s (2001) recent meta-analysis found an estimated criterion-related validity of $\rho = .34$ for the SJT, which compares favorably to other methods (e.g., .37 for assessment centers, Gaugler, Rosenthal, Thornton, & Benson, 1987; .51 for structured interviews, Schmidt & Hunter, 1998).

Response Options

The dimensions of CCSI assessed in the SJT are ethnocentrism and empathy. An ethnocentric person would tend to consistently use solutions that are unsuitable or inappropriate to the host culture. An empathetic person would tend to consistently use solutions that correspond to another person's feelings and/or behavior. Because these are orthogonal dimensions, four possible response alternatives were created for each scenario: empathetic-ethnocentric, empathetic-nonethnocentric, nonempathetic-ethnocentric, and nonempathetic-nonethnocentric. The empathetic-nonethnocentric option is the theoretically best strategy, and the nonempathetic-ethnocentric option is the theoretically worst strategy. (As summarized later, this assumption was tested and confirmed.)

Cultures Depicted

To make measurement more manageable, we selected a reasonable number of cultures for which to create scenarios. The following five cultures were chosen for representation in the scenarios: American, Chinese, Dutch, German, and Spanish. Each of the cultures was selected based on their economic positions in the world's economy, the size of their populations, the unique aspects of their cultures, the well-known stereotypes of their cultures, the generalizability

of their cultures to other cultures (e.g., Spain to Italy), and the degree to which they are different from and similar to one another on cultural dimensions.

The following sections briefly review the procedures and results relevant to the four phases of the development and validation of the CCSI measure: (a) developing the scenarios, (b) developing the response alternatives, (c) conducting the content analysis, and (d) establishing construct validity. Following this we discuss implications of this undertaking and instrument for practitioners.

Developing the Scenarios

Scenarios were developed and written to represent important, relevant, and challenging interactions of the five nationalities with one another: Chinese-German, Chinese-Dutch, Chinese-Spanish, Chinese-American, German-Dutch, German-Spanish, German-American, Dutch-Spanish, Dutch-American, and Spanish-American. Each of the nationalities was portrayed as an expatriate character once and as a host national character once, so that each culture was equally represented as the expatriate and the host-national (e.g., in the Chinese-Dutch nationality combination, the first situation portrays the Chinese character as an expatriate and the Dutch character as a host national and the second situation portrays the Chinese character as the host national and the Dutch character as an expatriate; see Appendix for three sample CCSI SJT items).

The material for these scenarios came from 29 persons (15 men, 14 women; 10 Americans, 1 Austrian, 2 Brazilians, 1 Chinese, 6 Dutch, 1 Filipina, 1 Flemish, 1 German, 1 Japanese, 2 Spanish, 2 Swiss, and 1 Turkish person(s); $M = 40.6$ years old, $SD = 12.0$), with experience working and living in international settings, who contributed critical incidents (see Crocker & Algina, 1986) for the development of the scenarios. Information was gathered via face-to-face, telephone, and e-mail interviews, an internet survey, and an expatriate journal. In

addition, cultural-values orientation information (e.g., Lane, DiStefano, & Maznevski, 2000) and business-related information about the five countries drawn from a variety of sources (e.g., Lewis, 1996, Marx, 1999) were used in creating contextual information for each scenario. Interviewees were asked to share critical experiences that were likely to (a) occur frequently and be common, (b) be challenging to handle and/or psychologically demanding, and (c) be important (see Ployhart & Ryan, 2000).

Over 40 critical incidents were gathered via the above procedure, with at least eight situations initially written for each culture (four as expatriate characters and four as host characters). Twenty-four of these were able to be written into scenarios that fit the SJT format. Scenarios were written with the following characteristics: (a) the characters (one of which was an expatriate) were from at least two different nationalities, (b) the nationalities of the expatriate and that of the host national(s) were specified, (c) the length of time the expatriate had been working in the country was specified, (d) the relationship between the characters was specified, (e) behaviors indicative of the emotion being felt by the target character were detailed (e.g., “Jung Lee looks to be trembling. She slightly turns away from him” indicates that the character is afraid), and (f) the scenario ended in a problem that needs to be resolved.

Developing the Response Alternatives

Thirteen other participants (10 women, 3 men; 2 Americans, 1 Chinese, 4 Dutch, 1 German, 3 Spanish, 1 Liechtensteiner^[1], and 1 Swiss participant^[2]; $M = 30.90$ years old, $SD = 4.77$) who had spent significant time in the five cultures helped to develop the response options. They completed surveys designed to solicit feedback about the scenarios and to gather culturally relevant response alternatives. The following questions were asked after each scenario: “(a)

What is (are) the problem(s)? (b) How can this problem be resolved given the situation? That is, what should (expatriate character's name) say or do next? (c) Would this problem be resolved differently if all the people involved were [American/Chinese, etc.] and the location was [The U.S./China, etc.]? If so, how? and (d) If you were (the host national), how could (the expatriate) resolve this problem in a realistic and reasonable manner that would make you most satisfied?" Responses to the questions were open-ended. Participants also provided general feedback on the scenarios, such as language used in the dialogue and any other issues that may adversely affect the validity or clarity of the scenarios.

This feedback was used to edit the existing scenarios and to create the four response alternatives for each scenario. Each response varied in the degree to which empathy and ethnocentrism were conveyed. Empathetic response options involved options that responded appropriately to the behavior conveyed in the scenario (in terms of taking into account the actor's feelings). Nonethnocentric response options corresponded with the response provided by the subject matter experts who were of the same culture as the receiving character presented in the scenario. These two combinations were crossed, resulting in the four response types: empathetic-ethnocentric, empathetic-nonethnocentric, nonempathetic-ethnocentric, and nonempathetic-nonethnocentric (see Appendix). The 20 scenarios and alternatives that best fit the criteria previously specified were selected, edited, and integrated together to form the CCSI SJT, which was then content analyzed.

Content Analysis

Scenarios and response options were content analyzed by 68 participants from the respective cultures as follows: 16 American nationals (44% women; $M = 33.60$ years old, $SD = 9.46$); 15 Chinese nationals (87% women; $M = 25.13$ years old, $SD = 2.13$); 15 Dutch nationals (60%

women; $M = 31.47$ years old, $SD = 9.57$); 12 German nationals (42% women; $M = 32.78$ years old, $SD = 12.85$); and 10 Spanish nationals (30% women; $M = 35$ years old, $SD = 9.90$).

Respondents were asked to assess the scenarios with regard to their *relevance*, *importance*, degree of *difficulty*, and *clarity* (to persons working in a foreign country), and to assess the response options with regard to their *effectiveness* and *clarity* (all using 5-point Likert-type scales). In addition, respondents identified the *best* and the *worst* response alternatives and were asked to identify the cross-cultural communication style (i.e., empathetic-ethnocentric, empathetic-nonethnocentric, nonempathetic-ethnocentric, and nonempathetic-nonethnocentric, or “does not fit any style”) that best characterized each option.

As recommended by Crocker and Algina (1986), several criteria were used to determine inclusion of scenarios and alternatives in the final CCSI SJT (and items not meeting the criteria were marked for revision or deletion). First, descriptives were computed to determine whether scenarios received high ratings on *relevance*, degree of *difficulty*, *importance* and *clarity*. Second, response alternatives had to receive high ratings on *clarity* and high inter-rater reliability on ratings of *effectiveness*, which was assessed by computing inter-rater reliability coefficients using the intra-class correlation coefficient (ICC; Burry-Stock, Shaw, Laurie, & Chissom, 1996). Third, an assessment of the four cross-cultural communication styles was conducted using one-sample chi-square analyses (see Dunlap & Myers, 1997, Levin, 1999) and one-way analyses of variance. The effectiveness ratings for each alternative and the identification of “best alternative” and “worst alternative” were compared to their intended communication styles to answer two questions: is there a relationship between cross-cultural communication style and ratings of effectiveness? and is there a relationship between cross-cultural communication style and evaluations of the best and worst alternatives? More specifically, are the empathetic-

nonethnocentric alternatives identified as the most effective (best) and the nonempathetic-ethnocentric alternatives identified as the least effective (worst) alternatives? In doing so, our purpose was to establish the validity of these two dimensions (i.e., empathy and ethnocentrism) believed to underlie the effectiveness of CCSI.

To briefly summarize these findings, the scenarios in general were found to be relevant, important, difficult, and clear. There was also a sufficient amount of variance on effectiveness ratings across the four response alternatives, and a good level of agreement (i.e., high ICC coefficients) on effectiveness ratings among the raters. Finally, additional analyses revealed that the empathetic-nonethnocentric options were generally seen as the most effective, or “best” (significantly more effective than the other three options), and the nonempathetic-ethnocentric options were generally seen as the least effective, or “worst” (significantly less effective than the other three options). These findings suggest that the ordinal-level effectiveness of the cross-cultural communication styles (from most to least effective) is empathetic-nonethnocentric, empathetic-ethnocentric and nonempathetic-nonethnocentric (these middle two were not significantly different from one another), and nonempathetic-ethnocentric, as intended and expected. Based on our *a priori* criteria for item inclusion, 14 of the scenarios showed good psychometric properties and distinguishable options and thus were retained in the final version of the CCSI.

Construct Validity

International students located in the five countries of China, Germany, The Netherlands, Spain, and the United States were recruited to complete the CCSI and several personality scales. Because international students go through similar stages of hardship, adjustment, and development to what expatriates experience (c.f., Van Oudenhoven & Van der Zee, 2002), yet

are pragmatically easier to access than expatriate employees, this sample was deemed appropriate for the construct validation study. Of the 197 students who initially replied to the requests sent by the researchers (via the students' universities), 19 did not meet the requirements for participation and 74 chose to further participate in the study. The majority of these 74 participants (40.5%) studied in The Netherlands, 32.4% in the United States, 18.9% in Germany, and 8.1% in Spain. The sample had a mean age of 25.9 ($SD = 4.9$, ranging from 19 to 40 years), was primarily female (58.1%), single (60.8%), had no children (74.3%), held bachelor's degrees (50%) or master's degrees (20.3%), and was working on a business degree (67.6%).

These data were used to confirm (a) sufficient variability across participants in terms of CCSI responses selected (ensuring that the "correct" answers were not obvious); (b) the reliability of the CCSI measure (alphas = .68 for overall scale, .61 for empathy subscale, and .71 for ethnocentrism subscale; these estimates are similar to those reported in other SJT studies, Chan & Schmitt, 1997); and (c) the convergent and discriminant validity of the CCSI measure. Regarding this last point, the specific convergent and discriminant relationships examined are summarized below.

First and foremost, we expected convergence between endorsement of the empathetic and ethnocentric CCSI alternatives and scores on paper and pencil measures of empathy (taken from the International Personality Item Pool, IPIP, Goldberg, 1999) and ethnocentrism (developed by Aiello & Areni, 1998), respectively. Both overall and subscale CCSI scores were related in the expected way to these measures (with an average magnitude of $r = .20$). (Larger magnitudes were not expected, given that the CCSI specifically measures empathy and ethnocentrism in a *cross-cultural context*, while the other paper-and-pencil measures do not.)

Second, we also expected convergence (i.e., positive, yet moderate, relationships) between CCSI scores and a number of other theoretically relevant personality variables (i.e., conscientiousness, emotional stability, openness to experience, tolerance for ambiguity, and self-monitoring); many of these have been repeatedly supported in the literature as predictors of expatriate success (Caliguiri, 1997; Ones & Viswesvaran, 1999; Salgado, 1997; Wilson & Dalton, 1998) or are theoretically similar to one or more of the CCSI dimensions. Results showed significant positive relationships between CCSI scores and conscientiousness, emotional stability, and openness to experience (all three measured with the IPIP, Goldberg, 1999; average magnitude of around $r = .30$), as expected; however, correlations with self-monitoring (Snyder & Gangestad, 1985) and tolerance for ambiguity (Budner, 1962) were smaller and did not reach significance.

Third, we expected a moderate relationship between CCSI scores and cognitive ability (operationalized via GMAT scores provided by the international students). Some have criticized SJTs as assessing nothing more than cognitive ability (Hanson et al., 1998; Weekley & Jones, 1997), but although some have found SJTs to correlate with measures of cognitive ability (e.g., Weekley & Jones, 1999), others have not (Ployhart and Ryan, 2000, who used a construct-oriented approach to their SJT). Because we used a construct-oriented approach to creating the CCSI SJT and tried to minimize any artifactual relationship between the items and cognitive ability (by, for example, using simpler language), we were not expecting a large relationship. On the other hand, we have noted that CCSI is believed to comprise several abilities as well as personality characteristics, and thus we did expect some relationship with cognitive ability. Our findings confirmed these expectations, with a correlation between overall CCSI scores and GMAT of .31.

Finally, we also assessed the relationship between CCSI and social desirability. This procedure is recommended when there is concern about social desirability bias (Spector, 1992), a frequent issue when measuring social skills (that is, respondents may simply choose the most socially desirable response alternative, rather than providing honest ratings of what they would actually do). As expected, our finding of no relationship between CCSI scores and social desirability (as measured by Jackson's 1984 PRF-E) rules out the concern that the CCSI is subject to a social desirability bias (as does the non-relationship with self-monitoring). It also supports our contentions that the correct answer is not transparent and that a certain level of knowledge and ability is required to achieve the correct response on the CCSI.

Practical Implications

Potential Uses for the CCSI

The results from the content analysis and construct validation provide support for the use of the CCSI in cross-cultural situations. Indeed, when we have presented or discussed this research at conferences, we have been approached by a number of practitioners, working with expatriate populations, who have been very excited about the development of the CCSI SJT, because they note there are insufficient tools currently available for such purposes. We see several possible uses for this instrument in organisations, including selection and/or promotion of applicants who would be working with multicultural coworkers or clients, selection for expatriate assignments, and several types of training and development initiatives. Before discussing each of these potential uses, however, it is important to note that, currently, the CCSI is supported by content and construct validity evidence alone; it has not yet been validated in a criterion-related way. We would strongly recommend the collection of criterion-related validity evidence before using this instrument for selection or promotion purposes.

Selection and promotion. The CCSI SJT has relevance for selecting both expatriate employees and any employees who will have as part of their job descriptions the interaction with persons from different cultural backgrounds. The advantages of the CCSI SJT for this purpose include not only its content and construct validity but also the potential for positive applicant reactions. That is, both SMEs and student participants in our research expressed enjoyment of and engagement with this instrument and readily saw its applicability (in other words, it has a high degree of face validity). This was true across the various cultures of our participants, something that cannot necessarily be said of other potential global selection assessments. For example, it has been noted that the perceived invasiveness of selection test questions can vary by culture (Gibby, Pratt, & Irwin, 2006), suggesting that some selection tests such as personality are more problematic (in terms of applicant reactions) to administer across multiple cultures. The scenario-based format of the SJT, however, does not ask personally invasive questions and thus may avoid this problem.

In addition, we saw no evidence of potential adverse impact in the use of this instrument, in terms of finding differences on CCSI scores with regard to age, race, or gender. From a practical perspective, the CCSI SJT can be administered on-line (as we did), and takes on average only 30-40 minutes to complete, which is similar to the reported administration times for other SJTs (e.g., Born et al., 2001; Chan & Schmitt, 1997). It bears repeating, however, that criterion-related validity data should be collected on this instrument. Regarding the choice of specific criteria, 360-degree performance ratings would probably be one of the most effective criteria against which to validate the CCSI, especially those coming from coworker and client perspectives (who may have more access to the interpersonal interactions of the focal employee). For use in expatriate selection, we would strongly recommend that the CCSI SJT also be

validated against criteria other than performance ratings, such as adjustment and completion of expatriate assignments. These criteria have been noted as particularly important and relevant in the expatriate domain (Caliguiri, Hyland, Joshi, & Bross, 1998; Ones & Viswesvaran, 1999).

Training and development. The CCSI instrument also could have immediate benefits as a training tool in any international or multicultural organisation, facilitating the awareness of differences between cultures. This instrument has applicability to both “internal” (e.g., for improving cultural self-awareness or communication among multicultural teams) and “external” (e.g., expatriate preparation) cross-cultural training initiatives. Such programs could include a discussion of the CCSI SJT scenarios in a case-study type of format; role-playing of the scenarios could also be included as an effective training method. Clearly not all persons from a given culture could be expected to behave as the target person does in each CCSI SJT scenario (as there are tremendous individual differences within a culture); however, awareness of cultural norms should allow trainees to better understand why things occur and how they can resolve issues (or at least how not to). Knowledge of such differences and the (in)appropriateness of one’s typical knee-jerk responses can help one prepare for cross-cultural encounters. If one thinks of one’s own culture, one usually evaluates a situation based on one’s cultural norms and proceeds based on the knowledge of those norms. Learning how to do that with other cultures could be one benefit of working with the CCSI SJT.

As the above implies, the multidimensional nature of CCSI has interesting implications for evaluating the effectiveness of such training initiatives. We would recommend expecting and evaluating improvements in terms of multiple dimensions of reactions, learning, and behavior (Kirkpatrick, 1976; Kraiger, Ford, & Salas, 1993). For example, such training should lead to increased knowledge of different cultures, increased self-efficacy for dealing with persons from

different cultures, increased awareness of the role of empathy and non-ethnocentrism in multicultural encounters, improved communication and interpersonal skills, improved collaboration in intercultural teams, increased job satisfaction, and increased likelihood of completing expatriate assignments. Finally, it is also the case that the CCSI SJT could be useful as a diagnostic tool for a future or different cross-cultural training program. That is, as part of a person-level needs assessment, the CCSI SJT could be administered to determine which employees need and could most benefit from an organisation's pre-existing cross-cultural and/or expatriate training programs.

For assessment practitioners themselves. Finally, sitting in a practitioner session at a recent conference, an additional potential use for the CCSI SJT occurred to us: assessing the readiness of HR and assessment specialists themselves to begin global assessment practice. That is, a recurring theme across several sessions aimed at cross-cultural assessment was that to successfully navigate the numerous challenges inherent in such global testing programs, practitioners had to be very adaptable, open, and culturally knowledgeable. For example, practitioners with experience in these areas discussed the need for testing specialists to understand multiple cultures and cultural differences, to not make ethnocentric assumptions about testing and reactions to testing, to work effectively with multinational teams and local contacts, and to be ready for surprises. In addition, recent employee testing and selection guidelines (see e.g., *SIOP Principles*, 2003) clearly state that global selection systems should take into consideration locally accepted practices. All of this suggests that the CCSI SJT might also be of some value to such practitioners in terms of a self-diagnostic tool for assessing their readiness, relevant skills, and implicit assumptions before tackling a global assessment initiative.

“Lessons Learned”

Finally, we would like to offer a few “lessons learned” regarding the development of SJTs and cross-cultural instruments in general, especially those involving the participation of SMEs from multiple cultures. Although some of these points may reiterate what testing experts have long encouraged, we have found these guidelines to be particularly important in the context of cross-cultural tests, and thus, they bear repeating. In other areas, we offer new suggestions not previously mentioned in the literature.

1. Use a careful and systematic approach when creating your items, because this will impact the validity of your instrument (Downing & Haladyna, 1997). For example, Crocker and Algina (1986) provide a well supported set of guidelines: (a) identify behaviors that represent the construct; (b) develop a set of test specifications that focus on each type of behavior or competency; (c) develop an initial pool of items; (d) review and revise the items; (e) field test the items and revise as necessary; (f) determine the statistical properties of the items and eliminate those that do not meet the preset criteria; (g) design and conduct reliability and validity studies; and (h) develop guidelines for administration, scoring, and interpretation of the test.
2. A construct-oriented approach to creating SJTs is most appropriate, as recommended by Ployhart and Ryan (2000). In the example of the CCSI SJT, this led to good reliability and the expected pattern of convergent and discriminant relationships for the measure.
3. Systematically develop and evaluate your situations and response alternatives by using well qualified (i.e., culturally knowledgeable) SMEs. Have both the items *and* alternatives evaluated by SMEs at *each stage of development*.
 - a. It is important to give careful consideration to the *criteria used to select SMEs* (especially multicultural SMEs). We used the following criteria for selection at

each stage of instrument development: persons must have had international experience either by having lived abroad or worked abroad, or by having worked extensively in an international context (i.e., in intercultural teams); and the length of service or cumulative length of their experiences must have been a minimum of 12 months. We found that valuable data could be gathered from a variety of persons who live and/or work in international contexts, including expatriates, those who travel internationally regularly, those who work with a cross-cultural team, those who deal with customers from different cultural backgrounds, and spouses and children of expatriates. Furthermore, we found it essential to gather data from persons who had had unsuccessful intercultural experiences as well as those who had had successful experiences. This increased the realism of the scenarios and allowed for the gathering of both positive and negative critical incidents.

- b. Effectively *recruiting* a sufficient number of SMEs is essential to the quality of the eventual instrument. We used the following recruitment methods: contacting language schools to recruit both their students and instructors; contacting companies for access to their expatriates (current and former); contacting international MBA programs; and activating personal networks. Although each of these recruitment methods yielded at least a few SMEs, the language schools were most effective in terms of yielding the largest number of willing SMEs. We would also note that we consistently found Chinese SMEs to be the most challenging to obtain, because that is a culture in which it is very difficult to make contact if one is considered a stranger. With this group, we had the most luck

with personal networks. Colleagues who had networks in China introduced us to their colleagues. Once a relationship was established, the Chinese SMEs were very willing to provide us with the help and information we needed.

4. Gather a large number of situations that are representative of actual work and social situations, “where individual differences in a given trait would be manifested by actual differences in behavior” (Ployhart & Ryan, 2000, p. 7).
 - a. The incorporation of social situations (i.e., those interactions outside of the workplace) is particularly relevant and important for developing tests for expatriate positions. Because a large part of the success or failure of expatriates is due not to their technical skills or work performance, but rather to their ability to adjust to the new culture and be happy (Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2004; Bhaskar-Shrinivas, Harrison, Shaffer, & Luk, 2005; Black, Mendenhall, & Oddou, 1991), the inclusion of the non-work situations allows for better measurement and increased content validity of the domain of expatriates. (This was strongly confirmed in our initial interviews with expatriates.)
 - b. We found that critical incidents for the situations could be effectively gathered using a variety of methods, including on-line surveys, face-to-face interviews, telephone interviews, and even expatriate diaries. Regarding the expatriate diaries, many of these are published online and the authors are often quite willing to have others use this information. These are particularly useful when the entire international stay has been recorded, which provides longitudinal data and therefore unparalleled insight into the expatriate learning process and correct and incorrect ways of behaving. An additional advantage of this method is that events

are captured as they occur and are not subject to biases associated with the recall of an event that occurred in the past.

- c. Assessments of both the situations and response options should be gathered in an open-ended format (allowing the SMEs to comment on any aspects of the situations and options they choose), but also with some guidance to the SMEs regarding the construct being assessed and specific dimensions on which ratings are requested.
 - d. Critical incidents gathered by SMEs should be supplemented by and augmented with additional information available regarding cultural orientation and business practices. We found several specific resources to be particularly useful in this regard, including the cultural-values orientation information by Lane et al., (2000), the book “When cultures collide: Managing successfully across cultures” by Lewis (1996) and a similar book by Marx (1999), and Schwartz’s (1994, 1999) theory of cultural values.
5. Finally, there are several important language issues to consider in creating and testing cross-cultural instruments.
- a. Regardless of the language of the instrument itself, the initial assessments (done by the SMEs) should be conducted in the SMEs’ native languages (as we did) to ensure understanding. When translating to another language, it is important to both translate and “back translate” to ensure the accuracy of the translation. Furthermore, translators should have extensive knowledge of the specific subject area to ensure that terms and ideas are understood and translated correctly.

- b. If the test itself is only written (and will only be administered) in English (for example), as ours was, the English items and instructions should be explicitly evaluated for clarity by groups of non-native English speakers from your target populations. Using simpler language for the instrument (i.e., no higher than an 8th grade reading level) helps in this regard.
- c. When validating the instrument against other measures, it is important to use “international” versions of other measures (those that demonstrate measurement equivalence across cultures), where possible. The International Personality Item Pool (Goldberg, 1999) is a good choice, for example, having been created for that explicit purpose.

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Footnotes

¹ Liechtenstein is a German-speaking country located between Switzerland and Austria. The experience of this evaluator included having worked in Germany.

² The Swiss evaluator was from the German-speaking part of Switzerland. This evaluator worked in a multinational company and had extensive experience working with all of the five cultures with the exception of the Dutch culture. Experience included an expatriation assignment in the U.S. and a short study period in China.

Table I

Overview of CCSI SJT Development Process

<u>Initial Decisions</u>	<u>Development of Scenarios</u>	<u>Development of Response Alternatives</u>	<u>Content Analysis</u>	<u>Construct Validation</u>
<i>Format: SJT</i>	29 Int'l SMEs	13 Int'l SMEs	68 SMEs from 5 targeted cultures	74 Int'l Students
<i>Response options: ethnocentrism X empathy = 4 options</i>	Provided critical cross-cultural incidents via interviews, internet survey, and expatriate journals	Provided feedback on scenarios and offered material for the 4 response alternatives	Rated 20 scenarios (on relevance, importance, difficulty, and clarity) and response options (on effectiveness and clarity), and identified best and worst response option and which CCSI style was portrayed in each	Completed CCSI and personality scales and provided other data (e.g., demographic, GMAT scores)
<i>Cultures Depicted: American, Chinese, Dutch, German, Spanish</i>	Resulted in 40 total critical incidents (8 for each culture), from which 24 SJT scenarios were created	Resulted in 20 scenarios with 4 response alternatives each	Resulted in retention of 14 scenarios; also results confirmed that empathetic-nonethnocentric is best response and nonempathetic-ethnocentric is worst response	Obtained good reliability of CCSI measure and expected pattern of convergent and discriminant relationships

Appendix

Three Example Scenarios and Response Alternatives from the CCSI SJT

Instructions:

This questionnaire contains a number of situations which include a scenario that ends in a problem and four alternatives to the problem. You are to imagine yourself as the person in the scenario who needs to provide the solution to the problem. You should think about how you would respond in this situation.

Rather than selecting one alternative as your solution, you will evaluate *each* alternative by evaluating the "likelihood that you would perform" each alternative using the following response scale.

1	2	3	4	5
not at all				extremely
likely to perform				likely to perform

Read each scenario carefully before providing your ratings. Please complete each situation before moving on to the next one.

1. (American-Chinese Scenario)

Wang Mai, an employee who moved to the United States from China one month ago, is having a difficult time getting used to the American way of holding meetings. She has tried to speak to her American manager, Frank Johnson, a few times about the issue, but was always too intimidated. She is currently having a meeting with him to discuss an upcoming production meeting and has decided to bring up the issue so that he may provide her with some advice. They are just about to end the meeting after having discussed all the necessary details.

Frank Johnson: (speaking fast)

“Well Mai, it looks as though everything is in order for tomorrow’s meeting. I must say that I’m very happy with our progress. Everyone seems to contribute his or her ideas. I really like this way of participative involvement; after all it’s more efficient and we are doing much better than our competitors. Well, if there’s nothing else, I will see you tomorrow.”

Mai hesitates in her seat and looks as though she wants to say something but cannot.

Frank Johnson: (speaking fast and impatiently)

“Is there something more you wanted to talk about?”

Mai again hesitates, but finally says:

“I don’t think that you understand how difficult it is for me to talk in meetings. I often have to rehearse everything I am going to say several times. When I finally do say something, I feel as

though I am yelling over you. I have to keep telling myself that no matter how wrong it seems, I'm not being rude. What frustrates me most is that the team is not getting my best ideas."

What should Frank Johnson say or do now?

Response Options

A. He replies immediately, "Oh, you really feel that way?! I don't understand why you have a problem speaking in our meetings. According to our latest business reports, participative meetings are a very direct and effective way to maintain our competitive advantage. You just need to learn how to speak up. It has only been a month since you have been here. Give it time and you will eventually get used to it." (NE)*

B. He replies very slowly, "Mai, I'm sorry that you feel that way." Then more quickly, "I realize that you may not be used to this kind of meeting style and that you are used to getting direct orders rather than participating in the decision-making. Why don't you just not talk during the meetings, and if you want to provide feedback – e-mail it to me." (NN)

C. He replies slowly, "Mai, I'm sorry that you feel that way. I sensed that you were not feeling very comfortable at the meetings. I understand that you may not be used to this kind of meeting style and your speaking to me about this now is a great indication that it is of particular concern to you. Can we develop some sort of method that will allow us to continue to have free discussions during the meetings and gain your feedback without making you feel uncomfortable? What if you e-mail me your feedback before the meeting? Would you like to think this over and we can discuss it again tomorrow?" (EN)

D. He replies slowly, "Mai, I'm sorry that you feel that way. I sensed that you were not feeling very comfortable at the meetings. I realize that your culture is not used to this kind of meeting style, but the latest business reports say that it is the most efficient way to hold a meeting. I have confidence in you that you will eventually get used to it. Would it help if we enrolled you in a public speaking course such as Toastmasters International?" (EE)

* These notations indicate the CCSI style represented by each response alternative. They are not ordinarily included in the test itself. NE = nonempathetic-ethnocentric; NN = nonempathetic-nonethnocentric; EN = empathetic-nonethnocentric; EE = empathetic-ethnocentric.

2. (Dutch-Chinese Scenario)

Jan-Peter (a Dutch expatriate) has been working in Nanyang, China for only three weeks. The company he currently works for is a Chinese company that recently merged with his Dutch multinational company, CTB International. Even though much of the business has been conducted in a format that he is used to (for example, almost all business is conducted in English), there are definitely some differences as well. His Chinese colleagues seem to sense his hesitancy whenever he encounters a foreign custom. Today, he is meeting with a group of very important Chinese vendors. They have many issues to discuss and only a few hours for the discussion.

The vendors spend about five minutes introducing each other and trading cards. He stands back and observes this tradition. The card trading is done very formally, with the card presented with both hands; head bowed, and two thumbs pushing the card into the receiver's waiting, open hands. Sometimes the cards are moved back and forth simultaneously in a skillful gesture that looks like two thumbs wrestling with one another. Jan-Peter watches the entire process with curiosity. Finally, one of the vendors whispers to him with a slight smile: "We have a very strange culture here with the card trading."

What should Jan-Peter say and/or do now?

Response Options

- A. "Yes, it is strange. But it is an important part of your culture." (NN)*
- B. "Oh no, it's very interesting. The way in which we do card trading in the west is very impersonal. Can you tell me the meaning behind it?" (EN)
- C. "Yes, you have. Isn't there a way that we can speed up the process as we have so much to get through today?" (NE)
- D. "Your ways....," he pauses and gives a small smile, "...you behave differently." (EE)

* These notations indicate the CCSI style represented by each response alternative. They are not ordinarily included in the test itself. NE = nonempathetic-ethnocentric; NN = nonempathetic-nonethnocentric; EN = empathetic-nonethnocentric; EE = empathetic-ethnocentric.

3. (Spanish–German Scenario)

Isabel (a Spanish expatriate working for multinational company RowAg) has been working in Germany for the past 3 months. She speaks German fairly well, but is not fluent. Luckily, her job rarely requires her to speak with clients and her colleagues are very understanding. One day she is working in the office through lunch and a client calls. As the secretary and everyone else in the office are out, she decides to answer the phone even though the call is probably meant for someone else.

“Yes, hello. You are speaking with Isabelle. How can I help you?” Isabelle asks in German slowly and carefully in an even tone.

“What?” he pauses. Continuing in German, he says quickly and loudly, “The order that I placed with your company has not yet arrived and I have clients waiting.”

“I’m sorry, but can you please speak slower? My German is not very good and I can’t understand everything that you have just said. Can you please repeat your question?” Isabelle asks slowly in German.

“Who are you and why are you on the phone? I need to speak with someone who can speak German properly.” He demands loudly and quickly on the phone.

What should Isabel say and/or do now?

Response Options

A. Isabel replies apologetically in German, “I apologize if my German is not up to your usual standards. I have been working here for only 3 months. There is no one else in the office at the moment. I can tell that your problem is quite serious and that you need immediate assistance. Can you wait on the line while I look for someone to speak with you?” (EE)*

B. Isabel replies quickly and staunchly in German, “I know that my German is not up to your usual standards, but I have only been working here for 3 months, which just has not been enough time to speak German properly. No one is here at the moment. They are all at lunch. I happened to still be here when the phone rang. Let me see if I can find someone to speak with you. Please hold.” (NE)

C. Isabel replies patiently in German, “I apologize if my German is bad. I have been working here for only 3 months. There is no one else in the office at the moment. Let me review what you have told me, so that I can give your message to the proper person when they return. I will have them call you back within one hour. You can count on this. Is that okay with you?” (EN)

D. Isabel replies quickly in German, “Let me take your name and number and I will have someone call you within the hour.” (NN)

* These notations indicate the CCSI style represented by each response alternative. They are not ordinarily included in the test itself. NE = nonempathetic-ethnocentric; NN = nonempathetic-nonethnocentric; EN = empathetic-nonethnocentric; EE = empathetic-ethnocentric

