

Lessons From Abroad: Teaching Cultural and Global Leadership in the U.S. Classroom

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Abstract

This paper provides an insightful perspective to the common problem facing many global leadership educators across the U.S.: helping students understand “global leadership” while they sit in U.S. classrooms. The instructor of an undergraduate leadership course addressed this problem by recreating for U.S. students in local “cultural groups” a “culture shock” similar to that experienced by expatriates in foreign cultures. The culture shock experience is important for cross-cultural leadership development because culture shock produces challenges of uncertainty, anxiety and stress similar to those challenges needed to be overcome by an effective cross-cultural leader. The author discusses course structure and design (i.e. experiential-reflection project utilizing participant observation to write multi-stage report) along with student feedback, illustrating that teaching global, cross-cultural leadership can start in one’s backyard.

Issue Statement

A common problem faced by many leadership educators in the U.S. is helping students to understand “global leadership” while they study in U.S. classrooms. As an experienced traveler and a seasoned educator, I know that experiencing a foreign culture first-hand and talking about that same culture from the confines of a U.S. classroom are two entirely different experiences. When teaching a student about a foreign culture (particularly the nuances of the culture needed for effective leadership *within* that culture), it would benefit the student to experience the foreign culture with their own eyes, instead of hearing about it. Nevertheless, taking 30 students abroad is generally not an option in our profession. Subsequently, in 2013, while designing my first undergraduate cross-cultural leadership course, I was determined to help my students understand what it is like to lead in another culture, regardless of the fact that they were not in that culture.

At the time I was two years removed from a 5-year stay abroad. As I reflected on this time, I focused on the aspects of my experience abroad that I could replicate for students in the U.S. I soon realized that while my experience abroad was significantly influenced by my behaviors, expectations, home culture, and host culture, I could replicate “culture shock”.

Review of Related Scholarship

Research on cross-cultural leadership has been prolific over the last few decades (House,

Wright, and Aditya, 1997; Dorfman, 1996; Grisham and Walker, 2008; Frost and Walker, 2007; Javidan et al., 2006). There are even studies *on* the proliferation of research on cross-cultural leadership (Dickson et al., 2003). However, research on *teaching* cross-cultural leadership has been sparse, particularly in the U.S.A. This has not discouraged American universities from teaching cross-cultural leadership. Several American universities have courses related to cross-cultural leadership (MIT – 15.996 – *Cross-Cultural Leadership*; Harvard -- MLD-202 – *Exercising Leadership: A Cross-Cultural and International Perspective*); however, most of these courses are based on leadership cases, previous experiences, analytical-reflective papers and group work (Bentley, 2004; Williams, 2015). As the author continues to search, no current research has been found on teaching cross-cultural leadership with the re-creation of culture shock as the venue for understanding cross-cultural leadership. Culture shock and leadership can both produce uncertainty, anxiety and stress. Thus, synthetically creating culture shock for leadership students (in U.S. classrooms) not only improves their practice of effectively handling uncertainty and anxiety common to many acts of leadership (Black & Morrison, 2014, p.109), it also gives them a taste of leading across cultures without being abroad. To better understand culture shock, it is necessary to step back and focus on some of the key factors that influence one's culture (which is related to culture shock). Some of these factors include human assumptions, beliefs, values, behaviors and expectations.

Whether at home or abroad, people have a basic need to understand and accurately predict the behavior of other people (Torbiörn, 1982, p.94) and one person's behavior is often based on how they *expect* another person will behave. And because current *expectations* are often based on previous experience (Combs, 2006, p.28), a person's culture (as a part of one's previous experience) helps to shape the current *expectations* of a person.

In short, a person who has been living in a home culture will, over time, develop patterns of expectation for how other people around them in the home culture will behave. This is because expectations for how others behave help to make the person's actions smoother and more effective because the person lines their own actions up with how they *expect* other people to act. This is based on their previous experience within the home culture or with the other people. However, a problem occurs when the person from the home culture suddenly arrives in a new host culture where the actions of people are different than the actions of people in the home culture which the person was used to. The person's patterns of expectations from the home culture may not align with the expectations for the new host culture (causing frustration, confusion, uncertainty, anxiety, and stress). The person is forced to adjust or face further problems within the new host culture.

Cheng (2005, p.371; Pettigrew, 1979; Schein, 1992; Schwartz et al., 1981, p.33) described "culture" as: a "shared system of assumptions, beliefs, values, and behaviors in [a] given group, community, or nation". And because people from different cultures have different values, norms and attitudes (Cheng, 2005, p.371; Pettigrew, 1979; Schein, 1992; Schwartz et al., 1981, p.33), it is understandable that these differences can lead to varied behavior among such individuals.

It is clear that culture is not limited solely to one nation or group of people; however, culture is also applicable to smaller groups of just a few people (so long as the group members

share common assumptions, beliefs, values and behaviors). Just as the term “culture” can be applied to members of groups, regions, or nations, “culture shock” is equally applicable across this same spectrum. Indeed, “culture shock” can apply to the expatriate abroad as much as it can to the person starting a new job in their hometown. The term “culture shock” was first coined by Oberg (1960; Torbiörn, 1982, p.94) and refers to a “feeling of uneasiness or anxiety that arises when we can no longer interpret the signs and signals which we need to guide us in our social interactions.” It has also been described as a process where the “sojourner must somehow confront the social, psychological and philosophical differences he or she finds between his or her own cultural perceptions and those of the new environment” (Selmer, 2007, p.60).

Culture shock is an emotional reaction that presupposes the need to be able to understand and predict other people’s behaviors and actions (Torbiörn, 1982, p.94). It is for this reason that when we cannot understand why people act in a certain way or when we cannot predict how a person will act, that we experience uncertainty (and, thus, anxiety and stress). One of the challenges of evaluating culture shock is that it is difficult to measure accurately because it is “subjectively complex” (Pedersen, 1995, p.4). Simply adjusting to a new culture requires the successful resolution of culture shock (Mumford, 1998; Hisam, 1997; Pires et al., 2006, p.159). Nevertheless, culture shock is also regarded as an experience of inter-cultural learning and growth (Adler, 1987), which was one of many reasons it was used as a common denominator in my cross-cultural leadership course.

Recreating culture shock (for students confined to U.S. classrooms) was relatively simple as it was only a matter of placing students in new, unknown, and uncomfortable situations (even if those uncomfortable situations were just around the corner from where they lived). By having the students identify and spend time with previously-unknown “cultural groups” in their U.S. communities, the students were adding the ingredients for “culture shock” (e.g. new people with unknown behaviors, values, beliefs and actions = prerequisite for culture shock).

More important than the students’ physical location is that the people with whom they are interacting share common assumptions, beliefs, values and behaviors that appear to differ from those of the observing students. The American expatriate on a business trip to Tokyo who has difficulty predicting the behaviors of their Japanese host(s) will experience a frustration that is quite similar to the non-Spanish-speaking, Caucasian American attending a friend’s Quinceañera in Houston, Texas. Much of the class structure was based on this.

The tools expatriates use to alleviate the uncertainty and discomfort of living in a foreign environment are the same tools U.S. students can use to alleviate the uncertainty and discomfort they feel while in these new “cultural groups”. Information-gathering activities (such as communicating, observing, and socializing with “the locals” abroad or hanging out with a group of minority students down the hall) helps to diminish uncertainty and discomfort because the more information one has about another person, the easier it is to predict the other person’s behavior and the less uncertainty a person feels about that other person (Ball-Rokeach, 1973; Torbiörn, 1982; Takeuchi et al., 2005). Cross-cultural leaders can also decrease their uncertainty, anxiety and stress by gathering more information about the locals whom they may lead.

Description of Application

I have taught the undergraduate class “*Leading in Diverse and Global Contexts*” seven times since the fall of 2013 (to 198 students). Each time I have assigned a “Global Diversity Leadership Experience Project” as a shell to help students experience a synthetic culture shock. This culture shock is intended to help students identify what it is like to live in a foreign culture without leaving their home culture (home country). The challenges students face within this project include feelings of uncertainty, anxiety, and stress when interacting and observing members of a different “cultural group”. These are similar to feelings they might experience if they were in a foreign culture outside of their home culture. Most importantly, culture shock can play an important role in leadership development, particularly in cross-cultural leadership development. This is because culture shock, as with leadership, can pose a variety of challenges for a person, including uncertainty, anxiety, and stress. When experiencing culture shock, one is uncertain as to the appropriate set of behaviors desired in a new culture, which produces anxiety, and, ultimately, stress. Likewise, an effective cross-cultural leader will have to deal with the uncertainty of trying to influence others in an unfamiliar local environment. This uncertainty can lead to further anxiety and stress for the leader. Thus, a person effectively coping with culture shock will have to overcome the challenges of uncertainty, anxiety and stress just as an effective leader (particularly across cultures) will have to overcome similar challenges.

Effectively handling culture shock (in U.S. classrooms) not only improves the U.S. students’ practice of handling uncertainty, anxiety and stress common to many acts of leadership, it also gives them a taste of leading across cultures without being abroad.

While the approaches I have used to synthetically recreate culture shock for my students have changed through course development, experiential learning remains the basis of my approach. Experiential learning for the purposes of this paper is defined as “the process of making meaning from direct experience; namely, learning through reflection on doing” (Pappa et al., 2011, p.1003). Reflection played a crucial role in the process of experiential learning because reflection helps the students to make meaning of their experiences. Without reflection, the opportunity to make meaning of an experience is lost. Reflection has been defined as, “an active process of exploration and discovery, which often leads to very unexpected outcomes” (Boud et al., 1985, p.7). To highlight the important role of reflection within experiential learning, I started using “experiential-reflection” projects in my course. It is in these “experiential-reflection” projects where students reflect on a previous experience to learn lessons that are beneficial for them in the future (in this case, as future cross-cultural leaders).

Students are introduced to the Global Diversity Leadership Experience Project on the first day of class when reviewing the syllabus. The project is divided up into three parts (Part A – Introduction of Cultural Group; Part B – Analysis of Cultural Group and Self-Identity; and Part C, the Final Paper and Conclusion Reflection). In a typical 8-week course (face-to-face or online), students are provided an overview of Part A, Part B, and Part C at the beginning of Week 1. Part A is due at the end of Week 2. Part B is due at the end of Week 4, and Part C is due at the end of Week 6. This approach can also be applied to a 16-week course. Parts A and B receive feedback from the instructor, which the students can use to revise and improve their final deliverable, which includes revised Part A and Part B, along with Part C and a Conclusion

Reflection. The Conclusion Reflection is extremely important to the efficacy of the entire project as the Conclusion Reflection provides a venue to link the project experience with key cross-cultural leadership issues and themes covered throughout the course.

Before describing the three parts of the project (Part A, Part B, and Part C), a sound understanding of some basic parameters of the project is necessary. First, there are the criteria used to select their chosen “cultural group”. Second, and more importantly, is the observational technique (i.e. participant observation) used to create the culture shock experience (in Part A).

The criteria for selecting a “cultural group” are to identify a group of 2-10 (or more) individuals who appear different from the student in culture, ethnicity, gender, sexual-orientation, etc. Students have chosen Mexican families who have crossed the border to make a better life for themselves, immigrants from a variety of Southeast Asian countries, and co-workers from Europe, Africa, and South America. Some students have also chosen cultural groups whose members may identify with a sexual orientation (homosexual, heterosexual, bisexual, etc.) that may differ from their own. Once they identify their chosen “cultural group”, students utilize the qualitative research method known as participant observation over the course of two or more hours to interact with members from their chosen group (either passively or actively).

Participant observation is a qualitative research method where the researcher collects data in naturalistic settings by observing or taking part in the common and uncommon activities of the people being studied. Participant observation includes the use of the information gained (for social scientific purposes) from participating and observing through explicit recording and analysis (DeWalt & DeWalt, 2011, p.2). This observation serves two purposes: (1) to provide students with data (from the “cultural group”) to compare to data from the students; and (2) to synthetically recreate culture shock through students’ interaction with the “cultural group”.

The students’ task is to simply observe what went on and to note down as much of it as possible: the sounds, the smells, the behavior of the observed. Students do this by answering questions focused on identifying cultural values, cultural norms, personal and national identities of the observed, as well as those of the students. This act of observation contributes to the changing dynamics of the situation. For instance, some members of the observed cultural group are uncomfortable in knowing they are being watched, which, in turn, is just as uncomfortable for the observer). It is this uncomfortable feeling (often by all parties) that makes the observers keenly aware of the fact that they are in a new, unpredictable situation. Interestingly, students often observe their “cultural groups” in the students’ natural environment (at work, while shopping, at a birthday party, at the gym, etc.) and, yet, despite this, students report feeling “hesitant”, “unsure”, “uncomfortable”, “anxious”, and “nervous”. What the students do not realize is the presence of these feelings indicates that students are showing signs of culture shock (even if it is a pre-fabricated culture shock). Furthermore, culture shock is culture shock regardless of the physical location. The uneasiness felt while observing and interacting with a group of foreign exchange students down the hall is similar to the uneasiness the student may feel if they were in the exchange students’ home culture.

Once the qualitative research is completed (consisting of participant observation lasting at least two hours), students then write the multi-stage, analytical report (Parts A, B, and C) that connects the collected data with the cross-cultural leadership issues and themes covered in class. Furthermore, two exams (a mid-term and final exam), along with three online discussion board activities ensure that students have mastered additional cross-cultural leadership materials, including the cultural dimensions of Hofstede (1984, 1985, 2001), those dimensions of Trompenaars and Hampden-Turner (1998), the GLOBE Study – Global Leadership and Organizational Behavior Effectiveness (Javidan & House, 2001), and David Kolb’s Four Modes of Experiential Learning and Four Learning Styles (1984, 1999).

While each part is important for the project’s overall efficacy, all three parts together are needed to promote the “experiential-reflection” aspect of the project. Part A (Introduction of Cultural Group) is important because it helps to recreate the culture shock experience via the use of participant observation. To supplement Part A, classroom time focuses on introducing students to several foundational pillars of cross-cultural leadership, including the definition of culture, values, norms, cultural assumptions, and the four adjustments typically made when encountering diversity: multiculturalism, separation, assimilation, and deculturation. Students compare and contrast these terms between themselves and members of their chosen “cultural group”.

Once the culture shock experience is established in Part A, students in Part B (Analysis of Cultural Group and Self-Identity) compare and contrast their personal culture and national culture with the personal and national culture of a member from their chosen “cultural group” (these terms are discussed in class before students complete Part B). The act of comparison reminds students that while similarities may make students feel more connected to members of their “chosen cultural group”, it is important to not let the real or perceived differences negatively influence the students’ judgement of the “chosen cultural group”. Furthermore, before completing Part B, students (in class) are introduced to personal and national identity (and their role of informing one’s personal and national cultures) while taking an abbreviated version of the Myers-Briggs Personality Quiz. Before students complete Part C (the Final Paper and Conclusion Reflection), they are exposed to the importance of multicultural competencies and resolving role conflict while abroad. Most importantly, Part C helps students to connect key themes from the first two parts (i.e. culture, values, norms, and cultural assumptions in Part A, and personal culture, national culture, personal identity and national identity in Part B) with more overarching themes from the course. These themes include a person’s need to understand and accurately predict the behavior of other people, a person’s culture (as a part of one’s previous experience) helps to shape the current expectations of a person), and when they cannot predict another person’s behavior, uncertainty, anxiety, and stress may result.

After completing the project, students are exposed in class to the idea that being tolerant of differences is a key component of multicultural leadership. This idea becomes progressively clearer throughout the project. For example, in Part A, many students are able to recognize that their initial reactions to their chosen cultural group followed an assimilation, separation, deculturation, or multicultural reaction. In Part B, they connect these reactions to their previous experience with their personal and national cultures, their personal and national identities, and to their own personalities. Many students realize (after completing Part C) that their tolerance for

differences appears to increase the more exposure they have to people different from them.

Thus, the three-part setup is intended to mesh the experiential aspect of the project with previous personal experiences of the students and key cross-cultural leadership themes from the course. Most importantly, overcoming the challenges of the culture shock experience (i.e. uncertainty, anxiety and stress) helps to prepare students for similar challenges when leading across cultures. All of this is done without having to leave the U.S.

Discussion of Outcomes

The success of the “experiential-reflection” project via participant observation is closely tied to the students’ experience of culture shock (and their reflection on this experience). While the numbers were not being formally measured, many students using the participant observation approach reported feeling “uncomfortable”, “anxious”, or “stressed” upon initially observing and interacting with their chosen “cultural group”. These statements align with the presence of “culture shock” and the accompanying uncertainty and anxiety. Culture shock aside, the reflection aspect of the project serves as a synthesizing agent linking the observed behaviors with course content and further enhancing student understanding of cultural and leadership behaviors of the observed group. Reflection activities help students to make meaning of their experience. In fact, through reflection, students are better able to connect thoughts and actions with the development of leadership skills (Guthrie & McCracken, 2014). The most significant outcomes of the project were most clearly exhibited in the Conclusion Reflections. In fact, these outcomes included the self-reported lessons they learned about other cultures, themselves, and their own subconscious stereotypes and biases towards members of diverse cultural groups.

For instance, these lessons included the idea that the initial minor differences in external appearances and/or actions (i.e. skin color, language, behavioral differences, sexual-orientation, etc.) should not overshadow any underlying similarities in values (i.e. family, hard work, sacrifice, belief in education, etc.) between students and members of the observed cultural group. Furthermore, refraining from passing judgement on someone’s behavior without acquiring more information on *why* the person was behaving in such a way, was one of the most common and profound takeaways by students. Several students reported (in Part A) that their initial encounter and observation of a different behavior from members of their chosen cultural group inclined the students to discount the behavior as “dumb, stupid, or odd” (negative evaluations). However, subsequent assessment of these initial encounters (in the Conclusion Reflection) helped students recognize that just because someone did something differently than they would, does not automatically make the behavior “dumb, stupid, or odd”. It is only different (neutral evaluation). This ability to refrain from passing judgement has been noted by scholars as an important step in adjusting to a foreign culture (Punnett, 2004, p.236) for leaders.

The project helped students to become more aware of their personal and national cultures (and values and norms) when they were contrasted with the personal and national cultures of members from the observed cultural group. Many students reported that the act of observing and assessing members of their chosen “cultural group” based on real or perceived differences created a contrast (between the observing students and the observed groups) that clarified the personal and national cultures (and values and norms) of the students.

The constant comparison between the students and the observed members of their chosen cultural group and the comparison back to their own previous experience helped many students to recognize instances of subconscious stereotypes and biases they had initially shown towards members of their chosen (or other) cultural groups. These were based on what the students' previous experience had conditioned them to think about members of the chosen cultural group (i.e. that all Hispanic immigrants do not want to learn English, that all Japanese female employees were incapable of acting against the orders of their male superiors, etc.). One student recalled an experience where (as hiring manager) they were reviewing applications for an open position in a warehouse. The student intuitively recognized they had been skipping over all female applicants for the position, not because they were not qualified; however, because this is what had been conditioned in the student's mind by society.

Most importantly, it is not just the lessons they have learned, but how they have applied those lessons to leading in their professional and personal lives. For example, many students in their Conclusion Reflection have grasped the concept that a leader who understands the actions and behaviors of people from diverse backgrounds can tailor their actions in a culturally-appropriate way that not only respects the diverse beliefs and traditions of the diverse individuals; however, by doing so, increases their ability to influence those individuals.

Furthermore, students also responded that a leader who better understands their personal and national culture is more likely to recognize when these cultures differ from those of diverse backgrounds. Through this recognition the leader is able to switch into more culturally-appropriate behaviors.

Reflections of Practitioner

The applicability of culture (particularly, culture shock) across many levels of groups, organizations, and societies helped to recreate the cross-cultural experience for students sitting in U.S. classrooms. I was skeptical as to whether students would feel the same uneasiness and uncertainty I had felt when I was abroad. The vivid descriptions of anxiety in their reports tell me that they did, in fact, feel symptoms of culture shock (even if it was hard to measure the strength of those symptoms – this would be a good topic for future research). Nevertheless, the fact that these are self-reported symptoms should indicate that caution needs to be taken while evaluating this data. The course will be taught for the eighth time in the fall of 2015 (and will continue to be taught over the next few summers to American college students studying abroad in Austria on 5-week stays). I anticipate slight alterations to the current parameters of the “experiential-reflection” projects. For the time being, participant observation of current experiences is the method of choice required of students. Finally, another key aspect of the project is that successfully managing the uneasiness and uncertainty (felt by students when using participant observation) is a necessary skill for leaders (across situations and context) to master (Black & Morrison, 2014, p.109; Clampitt & DeKoch, 2001, pp.11-15). The leadership experience is rife with uneasiness (responsibility towards followers) and uncertainty (of successfully leading followers towards a common goal). Thus, while navigating unknown environments and situations (i.e. foreign cultures or a home culture with *unfamiliar* members), students are also honing their global, cross-cultural leadership skills.

Recommendations

As students do not take part in an IRB-approved study (that was not my intention while developing the course), I have not formally measured instances and degrees of anxiety and uneasiness felt by students utilizing participant observation. This would be an interesting set of data to collect in the future (however, formal IRB approval would be necessary). The current observations of the professor on the efficacy of the U.S.-based course in using the culture shock experience to help students practice handling uncertainty, anxiety and stress common to many acts of leadership needs to be studied further. Nevertheless, preliminary conclusions indicate that having U.S.-based students “think globally” and “act locally” can begin with the unique “cultural groups” in their own backyard. Additionally, this serves as a viable way for students to understand the subtle nuances of “culture”. And this cultural understanding forms the basis for the global leadership skillset that is at the heart of this undergraduate cross-cultural leadership course.

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