Culture and the coaching practitioner: An interview with Dr Alastair Macfarlane

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Dr Alastair Macfarlane is a management practitioner, consultant and coach in the international domain. In this interview he explains how he takes a holistic approach to the preparation for an international assignment. Macfarlane emphasises the importance in coaching of self-awareness, the ability to reflect and being open to learn, as well as a consideration for the needs of any family that may come along. He tells of his own experiences and confrontations with cultures that were not his own, and gives practical advice for coaches working with a global workforce and organisations looking to send their employees abroad.

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Q: Thank you very much for agreeing to be interviewed for the Special Issue on Culture in Coaching. First of all, could you say a little bit about how you became interested in cultural issues?

My interest in cultures other than my own came with an interest in Africa and my involvement in the Anti-Apartheid movement, in the 1960s. Two factors in my early life help to explain this. I was brought up in West London in an area in which a large number of immigrants from the Caribbean and Indian sub-continent settled from the 1950s. At the same time, up to age 11 or so I suffered very bad childhood eczema and as a result had personal insight into what it felt like to be different. Although the primary school I attended was all white, I remember vividly the first immigrant children arriving at the secondary school I attended and not understanding the merciless bullying they were subjected to. I found this personally abhorrent and it sparked in me a hatred of discrimination and unfairness that later led to my commitment to anti-racism specifically but more generally, all discrimination and a deep involvement in diversity work.

Some 20 years later I moved to Oxford to take up a teaching position, reconnected with the Anti-Apartheid movement and joined the Africa Society at Oxford University.

Q: How did your experiences and interest in Africa shape an academic interest?

A combination of these contacts and a decision to undertake a doctorate led me to choose a topic that combined my academic interests in Organisation Behaviour and my personal interest in Southern Africa spawning a thesis that was eventually entitled 'Labour Control: Managerial Strategies in the Namibian Mining Industry 1970-1985'.

In the apartheid era international media attention focused on South Africa and very few people knew that Namibia was subjected to the same apartheid policies as South Africa. Indeed, worse, Namibia was an independent country which, under international law, had been illegally occupied by South Africa. A country the size of the UK and France put together, Namibia only had a population of around 1 million. I only ever came across two other researchers during the period of my involvement, which lasted some 12 years and expanded from academic researcher, to consultant to the International Confederation of Free Trades Unions, researcher for the UN, charity worker and, post-independence in 1990, consultant to the new Government.

Q: From all of these experiences, how did a coaching/consultancy practice with a focus on cross-cultural issues come about?

When I first visited Namibia in 1983 I was a relatively inexperienced traveller, never having ventured beyond Western Europe. Although I had some introductions, I knew no-one in Namibia, and stayed in a hotel for the first few nights until I was able to make some contacts and begin to find a cheaper way to live. It was kind of like the famous anthropologist Malinowski's description of his feelings at the start of his first field trip to Papua New Guinea in the early 19th century when he described being set down with his luggage, alone on a tropical beach close to a native village, while the boat that brought him sailed away!

A further challenge in my introduction to Namibia was the political environment at the time. Black activists and white sympathisers were regularly subjected to harassment and torture. Few tourists visited Namibia and it was pretty certain that my presence would have attracted the attention of the Namibian authorities, despite my academic credentials. This meant I had to develop a 'persona' and be careful how I introduced myself to the people I met – why, for example, did I want to hire a car for three months? But it was even more challenging that I had to learn to build and sustain relationships with people and groups with whom I would not normally mix, and whose views I found at best difficult to understand, and at worst objectionable, and yet exploit these relationships for research purposes. This required a constant awareness of my social environment, rapid learning of acceptable behaviours and maintenance of my own emotional balance in order to alleviate any suspicion and keep collecting research material.

I hope it's not over-stating the case to say that, sitting where I am now some 30 years later, these experiences and the feelings that went with them have much in common with the experiences and feelings of many of the expatriates I have met. It was undoubtedly this personal experience that led me to seek to understand and support others working in international environments.

Since my first visit to Namibia my academic research, teaching and consulting interests have taken me in different directions but ones that have always been related to the international dimensions of work organisation and human behavior. I have now been out of the academic environment for around 15 years, having moved into consultancy.

Q: Where do you think coaching ought to sit within the wider organisation?

My consulting is focused mainly in the business world and involves organisation redesign and integration, change management, executive coaching, leadership and team assessment and development, work that has taken me to various parts of the world and has required me to work with very different people in very different organisations, countries and cultures. Although I spend a significant part of my time doing it, I do not see myself as exclusively a coach, nor do I see coaching as a business solution on its own. Rather, I would define the area I work in as Organisation Development, in which one important tool is coaching.

Q: How can organisations build cross-cultural competence?

Cross-cultural work is experienced in a variety of different circumstances. The most obvious, and possibly the most intense, is living outside the home country through an expatriate assignment but other types of what I call 'global work' exist while living in the home country, such as working with a multi-cultural team or through membership or leadership of a virtual international team.

The received wisdom, particularly in the global leadership literature, has been that people best develop global capabilities through the experience of an assignment abroad. Part of the argument is that some of the global capabilities are closely linked to dimensions of personality, and that these are 'hard-wired' in to individuals so cannot be developed in traditional ways. Although I agree with this to some extent, it seems to me to be an inadequate approach; if we are able to identify the required capabilities, we can design ways of developing them. In addition, if we are able to identify a particular characteristic that in certain circumstances is not helpful to effective performance, even if it is 'hard-wired', we can support the individual to develop strategies that help compensate for it. Surely this is what education, learning and development are all about.

Q: Can you say a bit more about what is meant by 'global' competence'?

I tend to think of global competence as development in three major categories. The first of these is *personal competence*. Without going into too much detail about what makes people effective cross-culturally, the research clearly indicates that in addition to the specific job-related and/or technical competencies required for the role, there are a number of personal, interpersonal and cognitive capabilities that are important for non-leaders, and additional capabilities for those in leadership roles. Things to think about here are the level of interest and respect for different cultures, the ability to adjust to a different lifestyle, or to remain effective in ambiguous situations and to manage stress. An important element of my work has focused on these capabilities and I continue researching them.

The second category is what I call *personal social factors.* These include things like responsibility for elderly parents, children's schooling, partner concerns, religious or food preferences, health issues, sexual orientation and other aspects of lifestyle. These can introduce an ethical and sometimes legal issue for the employing organisation. An example of a dilemma I came across recently involved an organisation who sent a gay man to a country where it was illegal to be a practicing homosexual without acknowledging or discussing the issue with them. It's interesting to consider what the moral and legal position of the employer would have been if he had been arrested. Legally the employer has

a duty of care and issues of personal safety present organisations with ethical although not necessarily legal challenges, for instance where a practicing Christian is relocated to an area of the world where Christian communities have been harassed or worse. Similarly, employees that have responsibility for elderly parents or relatives may raise concerns for the candidate, if not their employer. This category is obviously important for someone considering an international assignment but some of these issues are also relevant for those who perform 'global' roles but who remain based in their home country.

Less obviously relevant, and sometimes linked to one of the previous two categories, is an individual's *personal motivation* for working in a global role. To put it simply, the candidate may be competent and have no social constraints with regard to their or personal circumstances, but actually, just not be that interested in, or even fearful or anxious about a role that exposes them to cross-cultural interaction. In my experience, global roles offered to individuals are often perceived as promotions, or career or personal developmental opportunities, so candidates feel a degree of flattery and some obligation to accept the position. In addition, candidates often do not have realistic expectations of 'global work' and some have a tendency to romanticise it; so it is important to inquire into a person's true motivations.

Q: How important is preparation for an international assignment and is this taken seriously by organisations?

My general experience of organisations is that there is a clear recognition of the need to help people develop the appropriate skills either in preparation for and/or shortly after they take up a new role. However, this tends not to happen for expatriate assignments or global work generally. I think this is because the difference between domestic and global work and the required global capabilities are not well understood and hence the need for assessment and developmental support in these areas are not widely accepted.

Most organisations select people for international assignments based on their *technical* capability to carry out a similar role in a domestic environment. These technical capabilities are often assessed before appointment, but competence to perform the role in a global environment is seldom investigated, despite the fact that the research identifies a lack of global competence as the more frequent reason for poor performance. As a result, generally very limited opportunity for global competence development takes place for international assignments and I'm pretty confident that the same is true for all types of global work.

Q: What in your view would be an appropriate approach?

Just like for other work, much of the developmental support for global work needs to be 'up-front', either before or during the early stages of a new role. Although the appropriate approach would differ depending on the circumstances, let me outline the steps I recommend in the process of recruiting for an international assignment. I will use my experience of working with a large and progressive international bank selecting internally for two-year international assignments.

The process started with a member of the HR Department having a discussion with potential candidates about the role and its requirements. Because it was an international assignment, the discussion involved issues regarding the length and terms of the contract and included practicalities such as 'look see' visits, family support, housing, home visits, visa and tax support etc. The purpose

of this was partly to provide information but also to initially assess candidates' interest and motivation. It was also important to recognise that some candidates wanted to consult their family or significant others in their lives before making any firm commitment. Essentially the process acted as an initial 'sift' of potential candidates who were then able to choose if they wanted to make a formal application.

For those that did apply, I conducted an in-depth assessment of their suitability, focusing on their global competence. This involved two psychometric tests – one of the standard tests and one specific to global competence. There are a lot of tests available that claim to measure global competence but many are of dubious value and have no published validity and reliability data. I mostly use the Global Competency Inventory (GCI), developed by a group of US academics and supported by strong data but I sometimes use The International Profiler (TiP), developed by the UK-based WorldWork organisation. It's important to recognise that these kinds of tests only measure one of the three categories of global competence I outlined earlier, that of personal competence. So I supplemented the questionnaire data with a 360 degree instrument that provided feedback from colleagues and managers on the global competencies of the candidate, and a self-assessment instrument that covered all three categories of the global competencies. I then conducted a lengthy semi-structured interview process to validate and better understand the questionnaire and self-assessment data and to explore personal social factors and personal motivation.

Q: What are the most common issues in cross-cultural assignments?

The most frequently quoted cause of problems is the inability of the family to settle in their new environment. Yet many organisations fail to involve candidates' families in any assessment and development processes and are resistant to doing so because they don't see it as their responsibility or perhaps view it as an intrusion into the private lives of their employees. Although it was a difficult sell, I was able to persuade the Bank I was working with to allow me to pilot the involvement of candidates' families in the process, where they had one and where they agreed for me to do so. Fortunately it was very successful and the Bank later adopted it as a standard part of the development process.

The family assessment involved completing the same psychometric questionnaires and self-assessment exercises but not the 360 feedback survey. I then spent time with the partner and older children carrying out a similar assessment process to the employee's but focusing on their ability to adapt to living in another country and culture.

Q: Where did coaching fit into this process?

My approach to the assessment process was to make it as much a learning experience for the candidate and family as it was an assessment for a job. Although I wouldn't define the overall process as coaching, much of what I was doing I would regard as coaching; raising self-awareness, identifying behavioural styles and preferences, helping think through the consequences and their impact on others and thinking of alternative behavioural and practical strategies. At the end of the process the candidate and their family had discussed what the experience would be like, had received feedback and discussed their ability to deal with the experience, had considered how they would manage it individually and collectively and identified areas of concern and where they needed further support. Generally they had a much more realistic view of the experience ahead, had a better

appreciation of the challenges and strategies for how they would deal with them. Importantly, it was not seen as a failure if candidates withdrew their applications as a result of this process.

I see coaching as a particularly important and valuable process in pre-assignment development and over time the Bank offered coaching to assignees as a matter of course. More readily than any other developmental medium, a one-to-one coaching relationship can focus on individual concerns and challenges and the development of relevant solutions. It is also a very effective setting in which to identify individual ways of addressing stuff by working through personal experiences or observations of others' behaviour.

Q: What was at the core of the success of the assessment process?

The Bank had been really visionary in that they also offered coaching to family members. More than anything else I felt this was a clear indication of the Bank's commitment to the employee and the success of the assignment and was highly valued by the staff I worked with. In addition to individual work, it frequently involved me coaching the family together to help deal with collective concerns and differences of expectation and it developed into a mechanism of support throughout the transition into and during the assignment itself. This provided 'real time' support for the family as they confronted issues of cross-cultural adaptation, interaction and integration and which, in some cases continued throughout the assignment and into the repatriation period, another challenging period for assignees and families.

Q: How would you characterise cross-cultural coaching?

For me, cross-cultural coaching was about working with assignees and their families on a wide range of issues that were experienced in the process of expatriation. These were not just about the personal interactions with people from other cultures but included a wide range of issues that challenged the client throughout a period of adaptation and adjustment. However, it was also important to recognise that coaching couldn't 'fix' everything and sometimes I had to be direct with assignees, their families and the Bank about the limitations. For example, there were instances where I saw weak relationships or family conflicts, where candidates showed insensitivity, disinterest or inappropriate attitudes towards people from other cultures, where individuals lacked the personal resilience necessary to successfully navigate the cultural transition or where practical issues such as elderly relatives, partner employment options or lifestyle preferences presented the organisation with potential unsolvable issues.

I have to say, it is seldom that I have worked with an organisation that provided such an integrated and coherent assessment and development process for expatriates and their families as this Bank. Most organisations adopt only parts of the process and most do not involve the family. However, coaches wanting to work with organisations in this way have to remember that even with the Bank, the process did not start out that way. We started with a more limited approach and as I developed a closer relationship with members of the HR Department and they were able to identify the benefits more readily, we built the expanded and more integrated process over time.

Q: What changes and developments are you seeing in the domain of global coaching?

I've talked quite a bit about expatriation and although it's predicted that numbers of expatriates will continue to increase, the patterns are changing and other trends are developing. For example, there's an increasing number of 'inpatriates', that is people coming from regional offices, particularly in the emerging economies, to companies headquartered in the West. Similar movement to the West is resulting from new businesses in developing economies expanding into the developed world, such as TATA. Another trend is the reduction in the number of young people entering labour markets in the West which will require the attraction of skilled labour from the developing world, a trend that is set to continue until the middle of the century.

Traditional expatriation approaches are expensive and another trend is for organisations to find more cost effective ways of servicing international activity. This had led to an increase in short-term assignments, where families are not relocated, and commuter assignments where staff commute to an international location for work and return to their home country at the weekends. With the increase in international travel and employment, organisations are also reducing costs by employing skilled expatriate staff who are already located in the countries they want to recruit in. Of course, the trend towards using technology to replace the need for travel or relocate, is also developing.

An interesting area, I think, is the emerging recognition that in international organisations *all staff* are to a greater or lesser extent doing 'global' work. This means that at least some of the global competencies I talked about earlier will become integrated into the competency frameworks for all employees, not just senior managers or expatriates, so that it becomes the norm and not the exception. Although this is not yet widely acknowledged, I have worked with a small number of larger global businesses to help them do this. What it means is that the global competencies become 'mainstreamed' as part of everyone's work and 'global' skills will become an integral element of their performance requirement.

An implication of this is that increasing numbers of people are going to require global skills development. This links with a major interest for me which is new ways of developing global competence and I am currently working on a project with the University of California looking at how we can use the virtual world as a vehicle for doing this. The initiative is still in its early stages and it is unlikely that all of the global competencies I've mentioned can be developed using this medium, at least not initially. As mentioned earlier, 'global' development requires a cross-cultural experience to learn from, and the idea of this project is to create this experience in the virtual world by bringing people from different geographies together. There are a number of advantages of this approach not least of which is the ease and low cost of connecting in this way but we will have to wait and see how the technology works and in what way it can adequately represent the cross-cultural environment.

Thank you, Alastair, for taking the time to be interviewed for the IJEBCM!

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