

## Preassignment matching: Giving managers the support they need

NEILL M. CARSON, International Assignment Profile Systems, Houston, USA

Everyone is aware of the frenetic scramble to secure and produce energy and commodity-related resources, with managers, geophysicists, and technical employees regularly traveling all over the world, and often on short notice. These days, however, many newly deployed professionals are relocating with their families, following the current trend of integrating work and family in a dual-employee household.

Most international managers and professionals recognize the necessary cross-cultural and work environment adjustments of an international assignment as well as the tax, benefit, social, and language differences. Many, however, are blindsided by the issue that recent research reveals as the top challenge facing expat employees in their international assignments—family adjustment.

When an oil industry assignment fails dramatically, it can end up on the front pages of business publications. Most assignments don't fail; however, they can turn out to be inefficient and take an unnecessary toll on the people involved. And the effects reach beyond the employee or family to impact the work system, coworkers, and the boss.

**Typical scenario.** Until recently, there has been no cost-effective way to prepare and support large numbers of employees on international assignments. Preassignment matching is emerging as a new solution to that problem, as illustrated by the following typical scenario.

Mary picks a team for her Malaysia project based on capability, technical skills, and attitude. She interviews the candidates carefully and feels comfortable they can handle the technical side of the work while making the management and working adjustments needed to work internationally. They all know that an international assignment is probably needed to foster their own career development and are eager to sign on.

The company provides them and their families with a "get acquainted" tour, and the benefits and relocation services help with taxes, salaries, and moving issues.

After about six months in Malaysia, most members of Mary's new team are doing good work.

However, Harry, who was described in his stateside reviews as an "A+" performer, is doing adequate, but not exceptional work. He seems to be having a hard time, coming to work late, and is stressed out, tired, and irritable.

Mary "covers" for him, and after confronting Harry, he confides to her that his spouse is still angry about having to give up her job back home. She fully expected to find acceptable employment in the new location, but she can't even find volunteer work. They haven't been able to secure the appropriate meds for his son's allergies, even though they were "over

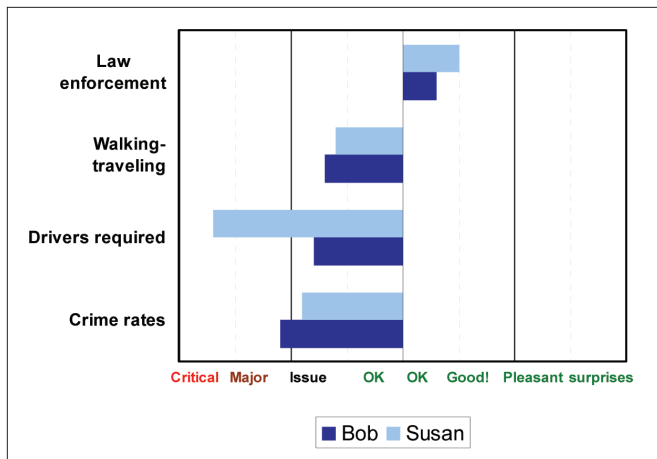
the counter" back home. His mother fell in the nursing home last week, and no one had made arrangements or signed the papers in case she needed to move to a different care center. Harry apologized. After the preassignment visit, it all looked exciting, and everyone was enthusiastic. Mary is sympathetic and is willing to continue to cover more for Harry, even to the point of shifting some of his duties to other employees.

Over the next month, Mary notices something interesting about herself: She is feeling more stressed and pressured, and a bit resentful about having to take up the slack from Harry. Shifting some of his responsibilities was not as easy as she thought, and the other team members were not happy about the increased workload. The last few important project deadlines and quality checks were all "close calls," and one required some rather heroic efforts on her part. Mary is ambitious and increasingly irritated that all these people's personal problems might affect her job performance. After all, her boss does not want excuses or stories about personal problems. He wants and expects results, and Mary had promised to deliver them.

The final straw came when George, one of her most reliable and indispensable geophysicists, announced that his father had died, and that he would be away for two weeks attending to family business. Even though George's father had

Destination matches	
<b>Critical issues (serious discrepancies)</b>	
<input type="checkbox"/> Quality and availability of physicians <input type="checkbox"/> Crime rates	<input type="checkbox"/> None
<b>Major issues</b>	
<input type="checkbox"/> Quality and availability of mental health services or counselors <input type="checkbox"/> Acceptable emergency facilities <input type="checkbox"/> Quality and availability of hospitals <input type="checkbox"/> Local law enforcement <input type="checkbox"/> Dominant religion	<input type="checkbox"/> Safety in walking and traveling <input type="checkbox"/> Quality and availability of mental health services or counselors <input type="checkbox"/> Quality and availability of hospitals <input type="checkbox"/> Quality and availability of physicians
<b>Discussion issues</b>	
<input type="checkbox"/> Racial balance <input type="checkbox"/> Safety in walking and traveling <input type="checkbox"/> Role and status of women <input type="checkbox"/> Availability of prescriptions and OTC medicines <input type="checkbox"/> Ease of getting around (mobility)	<input type="checkbox"/> Racial balance <input type="checkbox"/> Role and status of women <input type="checkbox"/> Availability of prescriptions and OTC medicines <input type="checkbox"/> Acceptable emergency facilities <input type="checkbox"/> Ease of getting around (mobility) <input type="checkbox"/> Crime rates <input type="checkbox"/> Host national drivers required <input type="checkbox"/> Status of US citizens <input type="checkbox"/> Stability of host national government <input type="checkbox"/> Social unrest and travel advisories <input type="checkbox"/> Dominant religion <input type="checkbox"/> Religious extremists
<b>Good matches with preferences</b>	
<input type="checkbox"/> Schools and education <input type="checkbox"/> Acceptance in the social environment <input type="checkbox"/> Climate and weather <input type="checkbox"/> Opportunities for local involvement	<input type="checkbox"/> Schools and education <input type="checkbox"/> Availability of other ex-pats
<b>Pleasant surprises!</b>	
<input type="checkbox"/> Availability of other ex-pats	<input type="checkbox"/> None
Bart	Martha

Figure 1. An actual working page from a preassignment profile, which becomes the basis for planning and assignment preparation (Source: International Assignment Profiles).



**Figure 2.** A bar chart of the key issues facing two preassignment candidates, Bob and Susan. The AI in this system has detected some key issues that may have severe negative impacts on the assignment. Most negative issues can be resolved by education, planning, and anticipation—it is the surprises that are dangerous (Source: International Assignment Profiles).

been in poor and failing health for some time, no back-up or temporary replacement for George had been arranged, leaving the entire work system in a compromised state. Mary felt blindsided and frustrated. She thought, how the heck was she supposed to know about George’s father? How many more of these surprises were lurking in her work team? She worries that her career is going to suffer, even though her technical work is outstanding. Couldn’t most of these things have been known in advance?

Will this make the front page of the *Wall Street Journal*? Not likely. Will it impact the success of the group’s work? Absolutely. But is Mary now supposed to be a social worker or psychologist as well as a manager? Should she ask about all these issues in her evaluation interviews? She may not even be authorized and certainly would not feel comfortable asking about personal and family issues, and yet they are the ones impacting her business success.

**New cutting-edge support system.** These events are costly in both human and business terms and have led to the creation of a new system of support for managers and employees on international assignment—preassignment matching (Figure 1). The most modern of these combine cutting-edge technology with management wisdom to assist with evaluating, preparing, and supporting a family on international assignment. The business purpose is to provide managers like Mary with employees who are minimally distracted, and families who are prepared before departure for predictable issues arising in their international assignment.

Historically, companies have experimented with screening tools such as psychological testing, attempting to “weed out” those individuals not deemed capable of handling a foreign assignment. Others have adopted purely voluntary self-help tools, again focused on psychological traits considered related to general adaptation on international assignments. While each probably helped in some way, they almost always ignored the families and were often too general. The fact is, people and families don’t adapt in general, they adapt to specific circumstances: A family that does well in one location may struggle mightily in another. Table 1 shows some common concerns of families that are moving to other countries.

Technology has now made available new tools that increase the ability to predict key issues before departure, allowing families and support personnel to anticipate situations and develop plans of action or problem prevention. These technologies

**Table 1.** Typical concerns of employees and families relocating to other countries.

**Expats and families are most concerned about (The top 5):**

- Crime rates
- Ability to walk and travel easily and safely
- Sanitation
- Hospitals and emergency facilities
- Workplace attitudes toward expats in the host national population

**Expats and families are least concerned about (The bottom 5):**

- Diet and the availability of familiar foods
- Dominant religion
- Racial balance and distribution
- Climate
- Availability and quality of mental health services

(Source: International Assignment Profile Systems, Inc.)

use artificial intelligence (AI) and operate synergistically with humans to deliver solutions that are timely, effective, and cost conscious. Online interviews, driven by expert systems, ask the questions and gather data ranging from medical issues, parents in nursing homes, children going with the employee, and children not going. These sophisticated systems ask questions much like a good interviewer, branching when needed to gather in-depth information.

For example, if the employee’s parents are deceased, no further questions are asked. But if a parent is in a nursing home, then questions about health and support concerns are asked. Likewise, an informational profile of children who are going on the assignment is developed, as well as children who are not going but will certainly impact the assignment—such as a child in college. The expert system inquires about a family’s needs and preferences, with questions about sanitation, housing, safety, language, and political instability. Expectations of spouses for employment, how important it is to the family to be accepted in the local community, and religious needs and expectations are all part of the interview. Almost anything that could impact an assignment is touched upon, including pets. (In the aftermath of the evacuations of U.S. Gulf of Mexico coastal areas, it became clear that many families chose to weather the storm because they were not allowed to bring their pets aboard the evacuation vehicles.)

In addition to the descriptive information, these systems administer psychological scales (with a psychologist always available to monitor and review the results), allowing the expat families to be compared to other expats on dimensions such as tolerance, flexibility, stress, coping mechanisms, and virtually any dimension related to adjustment to international assignments. Once obtained, this information is analyzed in relation to the specific conditions in the anticipated destination. Figure 2 shows a bar chart of the key issues facing two fictional employees who are being considered for assignment in another country.

Neural networks, fuzzy logic, and advanced statistics merge information from demographics, site ratings, and interviews with expats already at the location to develop a customized list of key issues that the family will face, along with aspects of the new location they will find most attractive. Traits that will help them adapt are noted, as well as styles

and characteristics that may cause difficulty. Pattern matching technology screens for patterns of failed or compromised assignments, or for patterns associated with unusual stress, anxiety, or personal problems.

Companies using this approach typically have the expat family meet with a counselor or outside service provider to review the data, and to discuss what types of plans and adjustments need to be made. The customized reports, unique to the family and the location, make preparation specific and tangible. Costs (to the company) are radically reduced, because there is no need to pay an expensive interviewer just to gather information. As one HR professional put it, "You spend your time solving problems, not discovering them." And it communicates to the employee and family alike the company's interest and commitment to both their business and human success.

**The specific benefit(s).** So how does this help managers like Mary? After all, she's a geophysicist, not an HR person. Let's start with a bit of management theory. Managers are given resources to help accomplish their tasks. In addition to the needed equipment and software, they also get skilled people. Mary would not willingly accept accountability for equipment or software unless it is cared for and working "up to spec." Machines will run for a while without oil, but they soon generate friction, produce wear, and eventually cause failures.

People (and their families on international assignments) are the same way. Employees who are distracted, stressed, or who feel they have harmed their family by accepting the assignment are likely to be less creative, make more mistakes, burn out, or return home. Managers may never know the issues from the families until it is too late. Research tells us that family adjustment is not just an issue, it is the number one issue. If Mary is to be held accountable for the performance and output of her team, she should insist that her "resources" are both prepared and supported. For it is she (and her career) who will bear the burden of the compromised success should problems occur. Stated another way, Mary does not need to do the preassignment matching, or even choose the method; but she certainly can insist that it be done.

And that is exactly what many managers in progressive companies are doing: They will not accept employees on their international team unless they are assured of getting an employee as free from unknown or unnecessary distractions as possible. If they are using preassignment matching, that is now what they can expect.

**Support in, don't screen out.** Many companies are struggling with a diminishing or thinly spread talent pool. Systems that screen out potential employees for international assignment will further diminish that resource. Preassignment matching attempts to "support in" rather than "screen out" candidates. A manager chooses the employees he or she needs to get the job done. HR or Employee Assistance Program (EAP) counselors (or third-party service providers), working with a preassignment report, assist the employee and family with developing alternative ways of dealing with the critical issues, allowing them to accept the assignment, rather than turning it down, being disqualified, or worst case, going to the destination and facing a crisis.

In the rare cases where support becomes too onerous or extensive, the assignment's feasibility can be realistically evaluated. A preassignment profile would have quickly picked up the fact that George's father's health was deteriorating, and that he would likely have to make an unexpected return visit home sometime in the next year. He could have advised Mary *before* departure, and both could have arranged to have

a suitable backup trained and available upon short notice.

Like any new development, preassignment matching is not a silver bullet or a cure for all problems. Issues of confidentiality are important, leading many companies to place the accountability for preassignment matching in medical, EAP, or HR areas, with the confidentiality that accompanies those systems. Most issues are resolved without the manager's knowledge but certainly on the manager's behalf.

**Systems that learn.** The use of preassignment profiles produces a wealth of data that allows systems to learn and improve their performance. Neural networks are trained to identify patterns of data associated with stress, anxiety, or compromised assignments. Unlike linear statistical analyses, these are nonlinear in nature and allow for the diversity of patterns and constellations of traits that are the hallmark of human behavioral data. Rather than being based on simple statistics, linear theory, or beliefs, the neural-network-based systems "let the data do the talking." As follow-up studies are conducted, the systems are retrained and can point out more accurate and useful information to the people employing them.

**Future developments.** The future for supporting international employees and their managers is bright. For companies with no support staff to review the preassignment profile, a family-based report and personal Web page, complete with pattern matches, recommendations, resources, and a list of recommended things to discuss and plan with the employee's manager is on the horizon. Personal "virtual" Web pages devoted to the family's successful relocation and generated from their unique, specific information, will provide a wealth of information and resources that are updated upon each visit.

For example, families with preschool-aged children would be shown a different list of educational resources than one with middle-school-aged children. Resources for children with special needs will be available to those who might need them. If the system detects a great deal of family stress likely to occur on the location, it could advise the employee to visit with the EAP or discuss the problems with his/her potential manager, as well as providing some general suggestions for stress reduction.

**Back to business.** To sum up, preassignment matching employs leading-edge technology to support employees and families on international assignments with the goal of increasing the business success of the assignment. The profile provides a customized list of actionable issues, based on a particular family in a specific location. The process is cost-effective, especially when compared with the high cost of a compromised or failed assignment, or to the cost of extensive information-gathering interviews. And while families are helped and supported in this process, the real bottom line is to support managers like Mary in her work, by providing her with human resources that are committed and focused.

Successful managers are beginning to hold HR accountable for providing them with the support they need to achieve excellence in their work and are insisting that prospective employee-family constellations are prepared and supported. Research has confirmed the issues, and technology has developed the tools. Preparing and supporting families in their international assignments does not guarantee success, but not supporting them certainly invites failure. **TE**

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# The International Assignment Profile

*Because your resources are human!®*

## Executive overview: The IAP

### IAP Goals

- **NO** compromised or reduced efficiency assignments
- **NO** failed assignments
- Increased employee focus and quality time on job
- Rapid and comprehensive preparation for international assignments
- Faster adjustment to international locations

### IAP Key Factors:

- Destination adjustment risks and issues **2**
- Back home factors: parents and children **3**
- Personal and family strengths and concerns **4**
- CHILDREN going on the assignment **5**
- IAP business philosophy and model **6**
- Summary and what's new. **6**
- Getting started! **6**

- The IAP increases the business and human success of international assignments by pinpointing key issues and weak links --while there is still time to plan and prevent problems.
- - uses advanced technology and artificial intelligence methods to gather, analyze, and present information that is accurate, timely, and useful.
- - is the only instrument to match the employee and family to the specific location they will be assigned to.
- - based on a business oriented model: choose the employees needed to get the job done— the IAP will highlight where support is needed to insure the success of the assignment.
- - is extremely fast, efficient, and cost effective compared either to the cost of a compromised or failed assignment or to other evaluation alternatives.
- -is easily customized to fit a client's needs and assignment processes.
- - can be modified, customized, and even "branded" to fit a client's or vendor's specific requirements.

### Increase employee focus and quality time on job!

The IAP report assists families and support staff in evaluating and anticipating the new challenges they will face while on assignment. An expert system guides the employee and family through a comprehensive interview,

gathering information ranging from security concerns to medical conditions to spousal employment – any factor that could detract from the success of the assignment if ignored. The IAP also evaluates important personality

factors associated with adjustment to international living.

The employee and family data is analyzed and compared to current information from the anticipated location to produce a focused, individualized planning report.

**Location:**  
The IAP  
identifies  
the issues that pose  
the greatest chal-  
lenges for the fam-  
ily on  
assignment.  
Prior to departure!

Issues for BOTH  
employee and  
spouse!

*“Family adjustments”  
rates as the most  
significant challenge  
and, consequently, also  
the one fewest  
assignees see as a  
minor challenge.”*

From

*The Cendant Mobility Study*

## Sample pages: Key adjustment issues



### Destination Matches

Critical Issues (Serious discrepancies)	
<input type="checkbox"/> Quality and availability of physicians	<input type="checkbox"/> None
<input type="checkbox"/> Crime rates	
Major issues	
<input type="checkbox"/> Quality and availability of mental health services or counselors	<input type="checkbox"/> Safety in walking and traveling
<input type="checkbox"/> Acceptable emergency facilities	<input type="checkbox"/> Quality and availability of mental health services or counselors
<input type="checkbox"/> Quality and availability of hospitals	<input type="checkbox"/> Quality and availability of hospitals
<input type="checkbox"/> Local law enforcement	<input type="checkbox"/> Quality and availability of physicians
<input type="checkbox"/> Dominant religion	
Discussion Issues	
<input type="checkbox"/> Racial balance	<input type="checkbox"/> Racial balance
<input type="checkbox"/> Safety in walking and traveling	<input type="checkbox"/> Role and status of women
<input type="checkbox"/> Role and status of women	<input type="checkbox"/> Availability of prescriptions and OTC medicines
<input type="checkbox"/> Availability of prescriptions and OTC medicines	<input type="checkbox"/> Acceptable emergency facilities
<input type="checkbox"/> Ease of getting around (mobility)	<input type="checkbox"/> Ease of getting around (mobility)
	<input type="checkbox"/> Crime rates
	<input type="checkbox"/> Host national drivers required
	<input type="checkbox"/> Status of US citizens
	<input type="checkbox"/> Stability of host national government
	<input type="checkbox"/> Social unrest and travel advisories
	<input type="checkbox"/> Dominant religion
	<input type="checkbox"/> Religious extremists
Good matches with preferences	
<input type="checkbox"/> Schools and education	<input type="checkbox"/> Schools and education
<input type="checkbox"/> Acceptance in the social environment	<input type="checkbox"/> Availability of other ex-pats
<input type="checkbox"/> Climate and weather	
<input type="checkbox"/> Opportunities for local involvement	
Pleasant surprises!	
<input type="checkbox"/> Availability of other ex-pats	<input type="checkbox"/> None
Bart	Martha

## Planning and anticipation reduces shock and stress!

Most of the well known and widely published stories of families having difficult or failed international assignments deal with the unexpected and unpleasant surprises encountered by the family on assignment. Even when companies provide expensive pre-assignment visits, these are often whirlwind tours that don't allow the employee and the family to encounter or check out the myriad details related to survival

and daily living.

The IAP identifies those aspects of the assignment that are likely to pose the most difficulties for the employee and family, allowing for education, discussion, anticipation, and planning. It also highlights those aspects of the new environment the family is most likely to enjoy– the “pleasant surprises”!



The IAP can function as the map to a successful assignment!

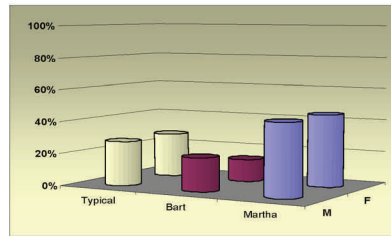
**The result to the company is increased employee focus and quality time on job.**

## Sample pages: The “back home” issues .

**Back Home:**  
The critical situations, conditions, and issues that will likely impact the assignment but can be addressed by planning and anticipation.



Back home parental stress factor comparison chart



*This chart reflects the magnitude of back home stress from parents. The "Typical" columns are the percentage of total stress factors and back home concerns about parents in the average international assignment. The other colored bars represent the degree of stress factors or concerns for the back-home mother (M) or father (F) for each candidate ex-pat.*

Issues for BOTH employee and spouse!

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Assignment risk factors from back home sources are almost never identified prior to departure but can add stress and reduce available work time and attention while on assignment.

Children who are **NOT** going on the assignment are important to include in planning. They may be in school, in military service, or grown and in stable situations.



### Children/stepchildren not going on assignment

These are the children and/or stepchildren who are **NOT** accompanying the family on the assignment. Important medical, psychological, physical or adjustment issues (if any) are listed for each person.

#### Jennifer

Reason not going: Attending school or college.

-Medical problems: some problems. Details: Takes allergy medications.

#### Nancy

Reason not going: Grown and living independently.

-Medical problems: some problems. Details: None provided.

The IAP is the only instrument available that gives you a detailed list of EXACTLY what issues need to be resolved and what planning needs to be done to insure the success of the assignment!





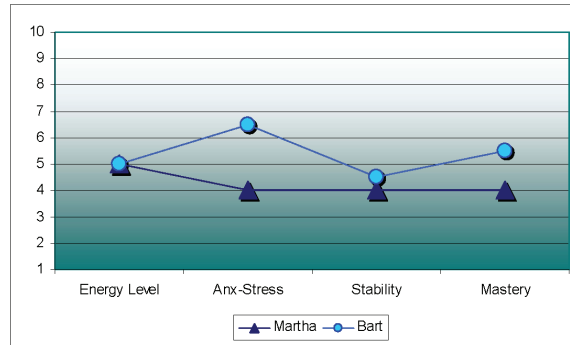
**The IAP identifies personal styles and traits that can enhance success or could pose adjustment obstacles and concerns.**

**The IAP includes validated measures of all the important personal and psychological traits associated with adjustment to international assignments and cultural adaptability!**

## Sample pages: Personal factors



### Adjustment Factors



Adjustment Factors	Level	Description
Energy Level (Martha)	Average	A typical amount of energy and endurance. Gets tired, but not more easily than most. Can handle intense and lengthy work as well as most people.
(Bart)	Average	Energy and positive drive are about average for the typical person or expat. Has enough energy to complete work and assigned tasks without becoming fatigued or overly tired.
Anxiety-stress (Martha)	Low-Avg	Relatively low anxiety in this spouse. Handles stress well, and does not suffer from excessive worry or nervousness. A positive sign. Handles stress well, and does not fret or worry needlessly. Positive sign.
(Bart)	HiAvg	Anxiety is just slightly above average in this employee. Shows no signs of obvious distress or anxiety that would hamper adjustment. A moderate amount of anxiety is, in fact, a positive sign for adjustment in that it indicates appropriate realization of stress and challenges.
Stability (Martha)	Low-Avg	Reacts to pressure and emotional stress in an outward directed manner, which is generally a good thing, but may not be useful in an international assignment. Gets upset more easily than most, and peaks out readily, and may need to learn to control feelings or at least the outward expression of feelings. Be sure to discuss interviews.
(Bart)	Low-Avg	Tends to get upset more easily than most people, and often reacts outwardly when upset. Work on learning to control feelings more, and especially to control outward reactions. Be sure to discuss this in planning meetings!
Mastery [LOC] (Martha)	LowAvg	Feels somewhat more at the mercy or circumstances, chance, and others than most people, but not seriously so. Often feels somewhat helpless, and sees others and luck as playing a great part in his/her success.
(Bart)	Average	Generally feels in control of things, and not at the mercy of fate or others. A good sign at this level.

**Factors for BOTH employee and spouse!**

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## Advanced artificial intelligence allows the IAP to learn from experience!

The IAP combines the experience of seasoned professionals with the power of advanced artificial intelligence to identify the important personal and family traits that will impact the assignment. Both strengths as well as concerns are noted, allowing the family and the counselor to plan changes and discuss adjustments or coping strategies.

Our technology utilizes neural networks, fuzzy logic, and expert sys-

tems, and has been featured in technical-professional journals. We've even been included as a "case study" in a new college textbook on artificial intelligence! We're proud of that, but we're even prouder of the fact that our AI (artificial intelligence) works entirely in the background, and in conjunction with seasoned professionals (humans!) to produce results that are friendly and make sense for the family.

We conduct follow up studies with

expats to gather information about what went well (or poorly), and the information is fed back to the IAP system, so that it learns new patterns and information, just like an intelligent human would!

This allows counselors and families with little or no experience in international assignments to get advice from a highly seasoned professional team, at a fraction of the cost.

*Independent research continues to confirm the importance of family support:*

**The GMAC relocation study (2006) found that “family concerns ripple throughout the study”, and that 67% of failed or compromised assignments were due to family adjustment issues!**

**CALL US TODAY!  
713 842-2087**



## Sample pages: Children going on the assignment

Planning for the safety, health, education, and social needs of children accompanying on the assignment is crucial in reducing not only risks, but insuring the employee-parent is not pulled away from the job to attend to issues that could have been anticipated, planned for, and dealt with before departure. Not doing this insures stress, strain, and less effective assignments in both human and business terms.



**Discussions with managers clearly indicate that fewer and fewer families will accept an assignment unless they feel their children are safe and well cared for.**



### Children and stepchildren going on the assignment

*These are the children and/or stepchildren who are accompanying the family on the assignment. Important medical, psychological, physical or adjustment issues (if any) are listed for each child. When appropriate, important location specific information will be shown (for example, a child with prescription medicine needs going to a country with poor pharmacy supplies would trigger a planning issue-alert).*

#### **Bartolo**

- Male, Age: over 25 years old
- Major medical problems: Yes, and the problem(s) is not yet under control, Details: No details provided- be sure to discuss in interviews.
- Minor medical problems: Yes, but the problem(s) are currently under control, Details: None provided-- be sure to discuss in interviews.
- Graduate student: Special educational needs: No (Details: No additional info provided)
- Bartolo is reported by parents as giving up just a few activities.
- There are no special concerns over separation or leaving. It is expected to be handled reasonably well.
- Bartolo is much more likely than other kids to become involved in drug or substance abuse. Be sure to discuss this in planning sessions, as drugs are relatively easily available in this location.

#### **Belinda**

- Female, Age: 15 to 19 years old
- Major medical problems: Yes, but the problem(s) are currently under control, Details: Needs allergy medications on a regular basis.
- Minor medical problems: No
- sixth grade to eighth grade Special educational needs: none

#### **Justin**

- Male, Age: Less than one year old
- Major medical problems: No, Details: No details provided
- Minor medical problems: Yes, and the problem(s) is not yet under control, Details: sneezes easily
- Note this is an infant child, and may need special attention or services!





Where in the world are you going? (tm)

International Assignment

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## The IAP business philosophy and business model

Straightforward, simple, and common sense: Managers who are accountable for the business success of the enterprise choose those employees who can accomplish the international business goals of the company. The IAP then provides a comprehensive assessment of what it will take to support the employee and his/her family on the assignment. The result? An assignment that is successful in both human and business terms.

Is it selection or preparation? The IAP is designed to “support in” rather than “select out” employees for assignment. If, however, the required support seems onerous or too extensive, common sense dictates that the manager and employee reconsider the wisdom of the assignment at this time, or perhaps consider a different international location.

**The IAP is the new standard of excellence in international assignment planning, preparation, and selection!**



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*Because your resources are  
human...®*

**CALL US TODAY!  
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**What's involved in getting started?** It is easy to get started. We meet with you (and your clients if you wish) to get an overview of your unique needs, locations, and types of assignments. The IAP is reached online through a link provided to the family. They can work from any computer with internet access, and can stop and start and even change computers or locations at will.

**How soon do we get results?** Our normal time is 24 hours, but if you need things faster, just let us

know and we'll get a report out within hours!

**How about security?** No data is stored on either the user's computer, or a corporate computer. The family accesses the IAP through a unique family ID, and only IAP staff can view the family's data.

**How about private labeling? Yes.** Customization is available to make the IAP appear consistent with other materials from a vendor or corporate internal EAP.

### What's on the horizon?

- A separate, family oriented report, that can be used in conjunction with the current report.
- **A Family Web Page!** This is a virtual page displaying the family's information, issues, matches—all the information in the family report. This page will have live links to information and planning resources that are frequently updated. This virtual page “disappears” with the close of the browser, thus eliminating security risks!

<b>Number of expats&gt;&gt;</b>	<b>200</b>
<b>Cost:</b> Enter the estimated total cost of an international assignment for an entire employee-family, lasting typically 24-29 months. The balance sheet method (most typical method according to PwC) includes all salary, benefits, transportation, housing etc. The estimated for the average assignment is \$1,032,000.	
	<b>\$ 1,032,000</b>

Group Assgnmt total costs \$ 206,400,000

**Presumed MINIMUM benefit to the company. This is the minimum or break even amount of value the company must derive from the assignments.**

**\$ 206,400,000**

<b>Failure rate.</b> This is the number of assignments that fail from ALL sources. Research and survey estimates from GMAC, PwC range around 7%. (enter %'s as .0X, for example .07) >>	<b>7%</b>
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**This represents cost (expenses) due to failed assignments (from all sources) with no benefit or value to company>>>**

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**\$ 14,448,000**

<p><b>Percent of failed assignments due to FAMILY issues.</b> This is the percentage of total failed assignments that you estimate are due from FAMILY adjustment issues. GMAC research found that 67% of the failed assignments were due to family adjustment issues&gt;&gt;&gt;</p>	<p><b>67%</b></p>	<p><b>\$ 9,680,160</b></p>
<p>The percent of families who do not fail an assignment, but are operating at a less than optimal level (impaired or less effective) due to family adjustment issues (IAP research interviews estimates this to be 1 in 5 or about 20% of all the families on assignment)&gt;&gt;&gt;&gt;&gt;&gt;</p>	<p><b>20%</b></p>	
<p>Degree of impairment. That is, of the families who are operating at a less than 100% level due to family adjustment issues, the estimated degree of inefficiency or impairment (due to family adjustment issues) from the optimal. Estimates are about 10%. Cost to company &gt;&gt;&gt;&gt;&gt;</p>	<p><b>10%</b></p>	<p><b>\$ 4,128,000</b></p>

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**Total costs of assignment failures due to family adjustment PLUS the loss from family adjustment issues detracting from full performance.**

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**\$ 13,808,160**

**Failure costs that could be prevented or recovered with a family evaluation and support program.**

**\$ 13,808,160**

Program and support variables: Programs aimed at reducing

Effectiveness of programs: percent reduction of losses. This is how effective you expect your program to be in terms of percent of failed or compromised assignment prevented.

**60.0%**

**Total saving at above rate: This is the dollar amount saved by the program at the estimated effectiveness.**

**\$ 8,284,896**



**Cost MAX (break even) per employee to obtain the above. Anything LESS than this flows into cost savings or profit contributions to the company.**

**\$ 41,424**

**Program costs**

Admin overhead factor (33% nominal)	33.0%
Interviews (initial and follow-up) and personnel costs per family	\$ 1,500
IAP Costs	\$ 750
Cross cultural training	\$ 1,000
<b>Subtotal</b>	<b>\$ 3,250.00</b>
<b>Admin overhead (33%)</b>	<b>\$ 1,072.50</b>
<b>Total Program expenses per family</b>	<b>\$ 4,322.50</b>
<b>Total Program expenses for expat preparation and support program</b>	<b>\$ 864,500.00</b>

**Total savings less the cost of the program**

**\$ 7,420,396.00**

**Savings per family sent on assignment.**

**\$ 37,102**

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**Over 2-3 year period**

**Families impacted:**

**14**

**9**

**40**

< This is the amount lost to the  
company from the above model.

family adjustment problems and providing support

< This is the amount returned to the  
company from the program. Program  
costs must be deducted from this  
number



< This is the Maximum amount that can be spent on EACH employee-family from a program. Anything more costs too much, anything less returns profit to company.

Return on each \$1 investment

\$

8.58



## Causes of assignment failure or compromise

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- Cendant found that **FAMILY ADJUSTMENT** was ranked as **the number one challenge** international employees face, ranked higher than cost control or working with host national management.
- GMAC found that **67%** were due to family adjustment issues and spousal dissatisfaction.
- SIRVA estimates that new, less experienced expats will need much more company support to successfully adapt.

# Does a solution suggest itself?

## Most Important Selection factors:

1. job-related skills (96 percent)
2. leadership skills (74 percent)
3. Career development for the employee (72 percent).



## Failures and compromises:

67% of failures (6-10% of total assignments) were due to “family adjustment issues” and spousal dissatisfaction.

## Least Important Selection factors:

1. Intercultural adaptability of spouse
2. Family needs (children’s educational needs, etc.)
3. Emotional resilience (of employee and family)
4. Spouse’s career impact
5. Family suitability and the intercultural ability of the employee listed as 9 and 10.

