



13 The global mobility “international employer” audit: Charting the territory

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ABSTRACT

Many authors and global mobility (GM) leaders ask for good data to base their expatriation decisions on. After all, where business insights lack it is rare that organizational decisions are high quality, agile and responsive to changing circumstances. One of the key aims of GLOMO was to develop a tool that helps important GM stakeholders, and in particular senior GM leaders, to monitor, analyse and refine their global mobility approaches. This chapter outlines pertinent GM design considerations in relation to strategic and operational pre-expatriation, on-assignment, and post-assignment decisions. In addition, it gives sample items of important performance indicators so that the reader gains an insight into core GM objectives. It shows how the GLOMO European research project is useful for organizations to improve their approaches to planning and managing the global mobility of employees.

INTRODUCTION

Conducting audits has multiple uses, generally aimed at improving an organization’s speed, quality, or comprehensiveness at tackling issues (Tyson et al., 2011). While a well-constructed audit allows for a self-assessment of management strategies, policies, and practices, it is often used in the spirit of continuous improvement or kaizen (Feldman, 1992). At times, audits are used by organizations to contrast themselves with other firms in their industries and to potentially see where they can emulate good practices elsewhere.

Audits are not value-free and are shaped by societal, industry and stakeholder pressures (Griffith et al., 2015; Waddock & Smith, 2000). In this sense, they are often not completely focused on strategic and operational effectiveness but can also represent broader goals such as the United Nations’ developmental goals or green HRM aims (Jackson et al., 2011; Papadimitriou et al., 2019).

The above shows that it is important to develop and implement audits in order to improve organizational approaches in a wide range of areas as well as to understand their composition, underlying values, strengths and limitations. Unfortunately, there is a lack of publicly available, open access and cost-free management audits in the global mobility arena. One of the key aims of the GLOMO initiative was to enable organizations to improve their planned expatriation approaches. The GLOMO consortium yielded a wealth of insights that have been the starting point to develop a global mobility audit with the aim of easy operationalization for organizations.

The GLOMO audit tool is geared to be used by global mobility (GM) departments and firms who assign their qualified employees to international ventures and operations. Its fundamental perspective is that expatriation and other forms of international work have three important, interrelated segments: pre-departure, during and post-assignments phases. Key elements of the pre-departure phase are concerned with the overall strategic planning of the organization to facilitate the achievement of important international goals either for the organization overall or for its foreign operating units (Dickmann & Mueller-Camen, 2006; Farndale et al., 2010). However, other GM goals are in relation to designing and presenting a GM employee value proposition (EVP) that is attractive to potential expatriation candidates and actual assignees (Dickmann, 2020a; Dickmann, 2020b). Furthermore, such an audit tool also has to be relevant and useful to a variety of company sizes (from SMEs to large Multinational Corporations (MNCs) and to expose desired standards for global mobility from the employer's and employees' sides. More in-depth information is presented below.

THE PRE-DEPARTURE PHASE: SHAPING THE ORGANIZATION FOR GM SUCCESS

Global Mobility and the Employee Value Proposition

Multinational corporations (MNCs) of various sizes strive to use global mobility to their competitive advantage. Some of the aims they pursue include filling vacant positions quickly, to transfer knowledge, to generate overall learning for their operations, to invest in their global leadership pipeline or to effectively integrate and monitor their worldwide operations (Harzing, 2001; Perlmutter, 2017). Given that many MNCs find it hard to source the 'right' talent for global assignments it is the employee value proposition that organizations need to pay attention to. The GLOMO audit tool explores the global EVP or organizations looking at the quality of the EVP and its impact on the reputation of the MNC as well as its ability to attract and engage global talent. The audit tool comprises items with answer categories that measure the extent of use / implementation / existence or importance. Below, we will always give five examples per sub-section.

Sample Item 1: My organization has a reputation as a "global player".
Sample Item 2: Global mobility / international assignment opportunities are a crucial part of our EVP.
Sample Item 3: We advertise international assignment opportunities in our job descriptions when hiring domestically.
Sample Item 4: Our organization evaluates our EVP with a view to attracting and engaging global talent.
Sample Item 5: Global mobility is a competitive advantage and incentive for employees to work for our organization.

There are a range of practical implications that could be based on the actual data that a company may gain from employing the audit tool. The first sample item data will have to be interpreted vis-à-vis its global ambitions. If the MNC aims to be in a position to be recognized as a major global player, poor data may indicate that it needs to think about how it approaches its international operations, how much it may need to invest and how it could build its reputation as a global player. Some research indicates that even major companies often do not do enough to use international career opportunities for their staff to build their reputation and EVP in the marketplace. For instance, French CAC and German DAX companies often do not mention international assignment opportunities in their job vacancies or on their websites (Point & Dickmann, 2012). The broader issue is whether and how MNCs consciously use global assignments and international working and learning to shape their EVP, i.e., the way they are being seen from potential job applicants and existing staff. Several items above aim to provide food for thought to organizations to monitor and evaluate their approaches vis-à-vis constructing an attractive EVP successfully. Where this is thoughtfully undertaken it is likely that companies have a competitive advantage domestically and abroad. It is also crucial to actually 'live' what you have promised as an organization. This will not only increase the engagement of staff with their employers but also increases the chance to have sophisticated, well-thought through company approaches to global mobility.

Cultural intelligence

Larsen (2004) has outlined that the mutual dependency between organizations and individual assignees is particularly high in expatriation. Once an MNC has an attractive global EVP, it depends on its staff to perform well abroad. Cultural Intelligence is crucial to the cultural adjustment of assignees and to the success of their work abroad. Going beyond a tight MNC perspective, the GLOMO audit tool concentrates on assignees and their cultural intelligence. We know from research that culturally agile/intelligent expatriates do not only perform bet-

ter when working abroad but are also more content with living in their host country (Caligiuri, 2013). Therefore, assessing cultural intelligence in expatriate selection would be a good idea and several professional instruments exist on how to do so. Nevertheless, the GLOMO project wanted to facilitate such an assessment either during the selection of assignees or post-hoc in an audit. Furthermore, such an audit tool, nourished by recent GM research, also offers a contribution to setting a standard that is evolving with the recent expectations and requests of employees and organizations.

Obviously, other selection criteria including professional capabilities and experience, the situational context of the candidate and the readiness of her/his family to move abroad as well as some personality factors should not be neglected in selecting assignment candidates. The GLOMO items exploring cultural intelligence are:

Sample Item 6: I enjoy talking with people from different cultures.
Sample Item 7: I have the ability to accurately understand the feelings of people from other cultures.
Sample Item 8: I think a lot about the influence that culture has on my behaviour and that of others who are culturally different.
Sample Item 9: I can change my behaviour to suit different cultural situations and people.
Sample Item 10: I am aware of the cultural knowledge I use when interacting with someone from another culture.

The various items aim for some key elements of cultural intelligence and the willingness to interact with locals. They distinguish intellectual, behavioural and emotional dimensions in expatriates’ cultural intelligence and preferences. Not only are people who are self-confident and extroverted often more able to adjust to the host context, expatriates who are actively engaging with locals, who want to learn from others and who can accurately reflect on their own preferences, attitudes and behaviours often fit in better. Individuals who score highly on these audit items are likely to be better able to adjust to other cultures and to ‘thrive’ abroad than those who do more poorly in this assessment. Where a job has a strong need for local understanding, culturally appropriate behaviours and is characterized by many cross-cultural interactions, being culturally agile is highly important (Baruch et al., 2013; Caligiuri & Caprar, 2022). Furthermore, culturally aware employees and international assignees may also better mediate between host and third- or parent-country nationals. Moreover, when they return, they can share intercultural knowledge gained abroad back home. In effect, engaging in the audit to explore the overall and regionally specific composition of expatriates in an organization may give valuable insights into a host of issues, including local-global interactions and performance of assignees.

Having looked at several issues that will be key in the design of the overall GM approach and its selection of culturally savvy assignees, this chapter now focuses on audit measures that look at key issues when working abroad.

THE ON-ASSIGNMENT PHASE: MAKING IT HAPPEN

On international assignment: The expatriate experience

Much of the available literature concentrates on pre-departure and post-return considerations in global mobility or focuses on assignees' experiences when working abroad. These experiences could stretch to the macro-context of working abroad in terms of institutions, political, economic, social, or legal environments or individual issues such as career patterns or cultural fit of assignees. The preceding chapters of this book have outlined a large array of important issues. Nevertheless, for an MNC, topics such as training and learning, performance, and rewards, are crucial in its management of assignments (Dowling et al., 2013).

Training, learning, and career capital implications

Learning and talent development are key to organizational success. Developmental activities need to be geared to specific learning areas in order to aid individuals in acquiring the necessary knowledge, skills, or behaviours. Of interest is first to explore general culture training (e.g., cultural self-awareness). In addition, investigating didactic training (e.g., providing general country information or help with cultural assimilation) that allow individuals to increase their level of host country insight seems useful. Context-specific trainings (e.g., case studies of host environments, language training, specific cultural preference of people in the destination country/region, preparation for interactions and cross-cultural negotiations) are also important to think about in terms of enhancing expatriates' skills and understanding. Lastly, the provision of experiential trainings (providing simulations, role plays or virtual reality training means) is important. The audit tool explores a broad range of training and development approaches.

Career capital (DeFillippi & Arthur, 1994) and investments into the acquisition of the three ways of 'knowing' are crucial concepts for individuals' careers. 'Knowing how' are the skills, knowledge and behaviours that make people successful in how they fulfil their work. 'Knowing whom' are the networks that careerists have and utilize and the subsequent reputation that they enjoy. 'Knowing why' is the motivational energy that individuals bring to the world of work (Inkson & Arthur, 2001). These three ways of 'knowing' are interrelated and mutually

reinforce themselves. For instance, individuals who are highly motivated (knowing why) are often so interested in their work that they are acquiring many capabilities (knowing how) to perform well in their jobs. This will make them more interesting (knowing whom) to network with and they are likely to enjoy a good reputation. Working abroad in terms of assignees' work networks, competencies and motivations are crucial for their global career journeys.

Sample Item 11: Our trainings contribute to a general personal and professional development of our international assignees.
Sample Item 12: Looking at your company's cross-cultural training before / during international assignments the organization offers general culture training.
Sample Item 13: Looking at your company's cross-cultural training before / during international assignments the organization offers culture-specific training.
Sample Item 14: International assignees are supported in acquiring career capital beyond the international experience itself.
Sample Item 15: International assignees receive individual support / coaching to increase their career capital.

The actual GLOMO audit tool offers some more specific items but listing these would stray too much into the detail. The interested reader can find further information on www.glomo.eu. MNCs and other international organizations that use the tool can identify their provision of training and career capital acquisition support. Thereby, organizations are in a position to identify what areas they are coving in terms of enabling their assignees to understand and successfully deal with their host culture and the various job and professional networking demands they are exposed to. They may, furthermore, use the tool as a benchmark for expected and desired practice that may enhance employer's attractiveness and the quality of assignment planning and support for internationally mobile employees.

Rewards to support organizational goals and to finance assignees

International assignments often do not come cheap. While the actual costs are dependent on the specific context of a particular assignment – factoring in the living costs in the host country, security measures, hierarchy of expatriate, the assignee's personal situation in terms of family and other obligations, etc. – one thing that writers agree on is that assignments are expensive. Sending persons abroad is, therefore, a substantial investment in order to fulfil major corporate objectives. Often, MNCs want to invest in their global leaders of the future.

In addition, international moves present tax and social payment compliance challenges in the country of origin and destination of the assignees. Because laws and regulations vary substantially around the world, it is no wonder that compliance is one of the core challenges for GM professionals (Dickmann & Baruch, 2011). Therefore, any international work needs to be compliant to the social

regulations, tax regimes and work / living permits of the host country while factoring in international and home country laws to protect the interests of the company as well as the individual. The GLOMO audit incorporates this important dimension with a range of items.

Sample Item 16: Employees on international assignment are retained in the home country pension plan (or get equivalent benefits abroad).
Sample Item 17: If desired by the international assignee, my organization offers support for their international tax filings and returns.
Sample Item 18: In general, international assignments are appropriately rewarded financially by my organization.
Sample Item 19: Our organization offers additional allowances (e.g., disturbance allowances) for employees who travel frequently as part of their role.
Sample Item 20: Our organization offers individualized / flexible benefits packages to globally mobile employees.

Of course, costs are not the whole picture. The benefits of an assignment and the overall GM approach should be assessed to adequately understand the organizational value of expatriation (Renshaw et al., 2020). Organizations are notoriously weak at really understanding such value because they are rarely assessing the benefits systematically or in a way that is capturing the various positive effects (McNulty, 2015). Using the GLOMO audit tool may alert organizations to either areas that they are not offering support or to the coverage and consistency of reward elements. For instance, if working abroad is normally rewarded appropriately in an organization but this firm identifies countries / positions where this is not the case, remedial action is necessary. After all, such implicit reward unfairness can lead to disengagement, early return, the perceived violation of the psychological contract and difficulties to source successors.

Performance management helping goal attainment

While some performance appraisal approaches have been challenged in recent times, actual performance management has not been called into question. Managing the performance of international assignees in the quest to pursue the global goals of the MNC is essential. Obviously, this needs a clarification of whose goals assignees need to pursue – amongst others these could be aims of the head office, of the organizational function or of the local host. Designing a global performance management approach with the aim to assess and to improve global performance management is important. The GLOMO audit tool helps organizations to evaluate their approaches.

Sample Item 21: Each international assignment has a clear goal definition.
Sample Item 22: The performance evaluation of international assignees involves stakeholders from both home and host country.
Sample Item 23: Performance during international assignments is tracked systematically.
Sample Item 24: Each single assignment, once completed, undergoes a standardized debriefing with success evaluation.
Sample Item 25: We use metrics / analytics to monitor overall performance of global mobility programs.

These items clearly identify some underlying assumptions as to what approaches are likely to improve performance management. First, assignment-specific goals should exist. Second, in order to gain international alignment of objectives, the literature clearly outlines that both home and host country should be involved in goal setting and monitoring. Third, the items imply that performance should be systematically recorded, analysed, and rewarded. Fourth, assignees should have high quality debriefs in order to increase the incentives to fulfil the objectives and to facilitate individual growth. Lastly, all performance evaluations should be linked to the overall IHRM and GM objectives and should be contrasted with the overall performance of the GM programme. As such, a systemic approach reviewing the pre-departure, on assignment and post-return achievement and mapping them onto departmental objectives and time horizons can increase the sophistication of global mobility work.

Given a good strategic GM set up and assignees capability and willingness to culturally adjust or cope with the local environment, these key areas – talent development, career capital investment and global careers, performance management and rewards – are the bedrock of GM success while working abroad. But the expatriate cycle outlines that repatriation and post assignment work is also essential to cement the success of global mobility. The GLOMO audit tool also illuminates activities in these areas.

THE POST-ASSIGNMENT PHASE

Demographics

Demographics aim to give us information on the context and situation of an MNC. The demographics allow a better interpretation of the data and over time the tool will allow us to have a more complete picture of GM approaches in certain industries, organizational size pattern and head office locations. The pre-departure and post-assignment phase are to some extent intimately connected as an evaluation of the demographics and together with the workforce flow data can give valuable insights on how to shape strategic and operational GM goals. In

addition, the GLOMO audit tool uses the demographics to explore important diversity indicators related to gender, language and diversity management in global careers.

Sample Item 26: How many employees are currently on international assignment?
Sample Item 27: In which industry/ies is your organization active?
Sample Item 28: What is your organization's percentage of female international assignees?
Sample Item 29: To what extent are global mobility and diversity management integrated in your organization?
Sample Item 30: Do you have a corporate language policy?

While many demographic indicators do not carry a notion of evaluation – size, industry, percentage or size of expatriate workforce – some data has a more normative notion. For instance, if GM and diversity management is not integrated in the organization’s overall management (or if there are no attached goals) then it is unlikely that these areas may benefit from senior leaders’ attention and refinement. In addition, the call to increase the number of women assignees and to offer more global career chances to women is not new (Adler, 1984). For decades too few women are company-assigned expatriates and global diversity is suffering (Dickmann & Baruch, 2011). It is often astonishing that MNCs do not seem to tap all available talent sources sufficiently and appear to ignore more inclusive approaches.

Workforce flow

The expatriation cycle is intimately connected to the workforce flow. The expatriation cycle provides a blueprint for the strategic planning of organizations in global mobility. In essence, analysing workforce needs and planning a global leadership pipeline underlies the business case which is fundamental for international assignments. Global workforce planning stretches across the three areas of the expatriate cycle but is most important in the pre-departure and post-return phases. Given that we have argued that the post-return phase is the time to best evaluate the GM programme and to refine it, we have put some key performance indicators into it. For instance, the achievement of talent mobility objectives, repatriation planning and post-assignment job allocation are placed into this highly analytical phase.

Sample Item 31: My organization maps and tracks talent mobility needs based on future requirements.
Sample Item 32: Talent mobility objectives (e.g., personal development, knowledge transfer) are systematically tracked.
Sample Item 33: My organization plans for international assignees' repatriation right after the assignment starts.
Sample Item 34: We have a pool of potential candidates for international assignments we approach when there is an opening.
Sample Item 35: Our strategic workforce planning is fully integrated with global mobility.

These items provide an insight into the strategic processes associated with GM in a particular organization. For instance, where organizations do not have a potential candidate pool for assignments, they will find it harder to have a planned approach to global leadership. While such organization can resort to open posting of international vacancies, it will make it more complex (but of course not impossible) for them to have a global leadership development programme. In addition, where organizations do not plan repatriation with foresight, they are more likely to experience higher repatriation turnover as candidates might be disappointed by the job opportunities that they encounter. One of the major challenges following an international assignment is often that returned employees' expectations are not fulfilled regarding promotions, enhanced pay and professional development after the return and employees may not wait for more than a year after return for things to meet their expectations before, they join a competitor.

Concluding thoughts

As stated in the key aims of the GLOMO initiative, this European research project should be useful for organizations to improve their approaches to planning and managing the global mobility of employees. The research can inform and enhance policies as well as practices for firms and institutions of any size and sector. In order to crystallize some of the operationalizable knowledge, the research also started to develop a GM audit "International Employer" as a useful and workable tool for organizations and their GM managers. The practical objective of the GLOMO consortium to improve GM following the rich insights from several years of research with 15 Early-Stage-Researchers (ESRs). This was conducted even throughout the Covid-19 period which raised new questions about global work (see e. g. Collings & Sheeran, 2020). Overall, the GLOMO audit tool reflects that international mobility assignments have three important, interrelated phases: pre-departure, main mobility, and post-assignments phases.

The GLOMO Audit tool has been based, informed, and enriched by the research of the fifteen Early-Stage Researchers (ESRs) of the GLOMO project between end of 2018 and early 2022. It has been developed and enhanced with several rounds of revisions and also corporate corroboration and tests. The aim was to obtain an instrument that is applicable to public and private non-academic organisations of various sizes. The audit tool is geared to help organizations to offer high quality employment conditions for international employees and hence can constitute a performance support instrument as well as a contribution to employer attractiveness for internationally mobile employees. David Enser, the CEO of RES Forum, a major GM professional networking organization headquartered in the UK, commented that “the GLOMO tool is an important step for organizations to understand what they want to achieve with their global mobility and how they are progressing on that crucial journey to higher quality GM”. In addition, the tool may also serve the employer brand vis-a-vis international assignments of employees (Mihalcea, 2017).

A first draft of the audit tools has been tested with Airbus as the corporate beneficiary of the GLOMO research project. Following the test and discussion of the instrument, the instrument was improved to address identified weaknesses. Subsequently, several partner organizations in the project (including IPC from the Netherlands; The RES FORUM, UK; and Siemens Gamesa in Denmark) plus other smaller companies and consultants across Europe have been involved to further refine the tool.

Beyond the empirical research for the audit tool, a GLOMO workshop in April 2022 (still fully on-line because of Covid-19) served to inform members of industry, politics, the general public, managers, and entrepreneurs about the contents and functioning of the audit “International Employer”. It also helped to further implement adaptations for SMEs and public organizations. During the workshop the tool was perceived as useful in benchmarking, and it is widely expected that it inspires good global mobility practices. Furthermore, such an audit tool could be refined by up-to-date GM research in the future, also offering a contribution to a more perennial outcome from the GLOMO research project. This would continue to support the initial intention of the project with the Audit “International Employer” which was to stimulate and institutionalize sustained intersectoral knowledge transfer, to foster the practical application of research results and, hence, to increase innovation capacity of European and worldwide industries.

Overall, the audit tool ‘International Employer’ is perceived as providing relevant insights that help to manage cross-border labour mobility and international career development in practice. It can be used for corporate preparation, benchmarking of good mobility practices as well as an ongoing research tool to

continue gathering global mobility data informing theory and management practice. Beyond a tangible and operational output as a tool from the GLOMO doctoral training and research project, the audit tool could also be employed for possible anticipation of GM challenges and preparation to continuously improve strategies, policies and practices in this important area of global work. It is certainly helpful to better master these turbulent and crises times.

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