Human Resources Transformation Beyond Boundaries in Outsourcing Business Model - Expatriate Benchmarking

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Abstract: Human Resource (HR) divisions of multi national companies (MNCs) are under tremendous pressure globally with the challenges and opportunities with the outsourcing business models to maintain competitive position in the marketplace. Attracting the mobile talent with multi dimensional skill set to address effective, efficient and controllable business needs is becoming complex, hence expatriate management and training has gained much attention. Successful Expatriate assignments drive revenue, value and growth to the organization. The expatriation process requires huge amount of effort for analysis, planning, selection and training before the departure of the associate to the host country from the home country. The authors would like to bring the practical approaches that needs to be considered in global business outsourcing model considering 3 dimensions – Associate delight, Customer delight and Investor delight with expatriate benchmarking. The research study also brings the expatriate management strategies in 3 categories – Onsite (foreign location / host country), Offshore (home country) and Near-shore (country close to host country, but with lesser delivery cost). To substantiate the research, the data is collected from several Human resource leaders and managers at various levels – HR Executives, HR Analysts, HR Managers, Senior Managers from IT organizations in different geographies through interviews and web based surveys. Statistical analyses are conducted on the data collected through multiple channels and these analysis reveal that a) the organizations with good global management strategy had larger number of associates with better expatriate experience, steadier focus on leadership, resulted in better financials b) The training is more focused on technology and job related skill set, but often ignored the level of depth in imparting the behavioural and cultural skills. The main contributions of the paper are we have proposed expatriate transformation canonical model for expatriate resource requirements fulfilment requests originating across the globe for IT services organizations. Following the IT services industry, we have followed the benchmarking methodology and used a template to understand the expatriate management practices, in the past and present, as a part of the human resource management function and extrapolated the data for the future expatriate operations by strategically building a manageable operational model by utilizing and tuning the organization culture

Keywords: benchmarking, expatriate management, expatriate training, ROI, onsite, offshore, near-shore

1. Introduction

Technological advancement and innovation in the global business landscape is resulting in significant challenges and opportunities for the IT industry. Driven by these challenges and opportunities, organizations are moving across national borders by establishing foreign-owned subsidiaries, entering into joint ventures and strategic alliances to align the organisation to the ever changing business needs and survive in the competitive market place. International business assignments are important to the success of the MNCs because they help to build the level of global competence and global integration within the organization [Paula MaryAnne M and Aparna, 1998).In today's agile market conditions, the C-level executives are challenged to grab the opportunities, make these opportunities successful, thereby making referenceable customers to sustain in the business. To accomplish these goals, the executives are looking for new ways and models to exploit the current and next generation growth opportunities with best-in-class talent. To achieve global delivery excellence, organizations are reshaping the traditional business models, adopting the outsourcing models, deploying and utilizing its global human talent through expatriate assignments as platform to manage and win the business overseas. As the world continues to globalize, firms are required to manage an increasingly diverse workforce with expatriation being just a subset of this challenge. Due to expatriate assignments by multinational companies, language and mobility parameters have significantly impacted across the globe. National culture has received so much attention because it is hypothesized to be a constraint on management practice and organization culture (Barry, 2008).

Global expansion strategies are essential for small, mid and large sized IT organizations to expand and sustain in the business by recruiting and retaining globally competent people and utilize their managerial and technical capabilities for a competitive advantage. Expatriate management nowadays is regarded as one of the tools international organizations use to enhance global integration (Evans,

Pucik, and Barsoux, 2002). To lead these international operations successfully, flexible and highly skilled workforce with global mindset and strategic vision is needed. Successful Expatriate assignments drive revenue, value and growth to the organization and have always been a driving and determining factor for the success of the organization's overseas operations. The expatriate managers become the cornerstones on which the international operations are built as they help in informal control mechanism, for knowledge transfer, and for international team development. Hence, an emerging view of foreign assignments is that it may create a unique competitive advantage which is difficult to imitate by competitors.

The research study revealed that the multinational organizations are structured and governed based on their working model and relationships. There are several types of global assignments that exist based on the business needs and trends, hence the expatriates will be sent to foreign locations with different duration types – Short term, mid term and long term. Based on the survey analysis, most of the multinational companies classify a short term assignments duration may include 1-3 months, midterm assignments duration may include 3-6 months and long term duration may include more than 6 months. This paper is organized as follows. We begin with a brief literature review to emphasize the research context, and then we discuss the delivery patterns/mechanisms in IT companies. Subsequently, we have the proposed framework for expatriate transformation and conducted benchmarking analysis of IT organization and finally concluded with findings and insight with the fellow practitioners and researchers.

2. Literature survey

The birth of number of multi-national companies, happened due to globalization impact, predominantly from India and china, captured the most part of the world business due to high availability of skilled resources at cheaper cost and better capabilities. The influence of the globalization demanded the organization to re-visit the human resource management processes and practices to effectively serve the business needs and create value proposition to shareholders, customers and employees. Cross-border acquisitions, mergers, joint ventures and strategic alliances have all been contributory factors in the expansion of MNCs across continents since the 1980s (Buiges et al. 1990). According to CIPD/KPMG labor market outlook report on skills, migration and off-shoring, almost half (45%) of the 600 employers surveyed report vacancies that are hard to fill, with 21% saying they are recruiting migrant workers for engineering vacancies, and 18% for both IT and accountancy/finance positions. As a result, almost one-fifth (17%) intend to recruit migrant workers in the third quarter of 2010. In the past three months, one in five (21%) of employers surveyed recruited migrant workers with over a third (37%) of these workers being recruited from outside the European Economic Area (EEA). More than half of migrant workers hired by the financial sector come from outside the EEA. The findings also point to greater off shoring activity. Nearly one in ten (9%) private sector companies plan to offshore jobs in the 12 months to June 2011. Of those planning to offshore UK jobs, two-thirds (65%) intend to offshore to India, a third to China (36%) and three in ten to eastern Europe (29%). The most common functions outsourced by employers include call centres (55%), IT (51%), and finance (49%) (KPMG & CIPD, 2010). A fundamental challenge faced by multinational companies today is how to ensure that managers develop not only an overview of the organization in its entirety, but also a feel for international business (Gooderham & Nordhaug, 2003).

A lot of research still continues to view the globalization topic is a work in progress. Only a few firms are considered to have developed an effective capability to locate, source, manage human resources any where in the world (Lewin and Volberda, 2003), and multi national enterprises continue to have assets, sales, ownership of work forces and control concentrated in home countries or regions (Rugman & Verbeke, 2004). Tung (1995) suggests that three major developments have contributed to the increasing need for managers to be able to mediate and work effectively with people from diverse societal, cultural and economic backgrounds: namely, the formation of global alliances across organisations from different countries; the increasing globalisation of the workforce and the emergence of a network structure.

The study of global staffing has traditionally concentrated on resourcing key positions within Multinational enterprises and top management top key positions at Head Quarters and subsidiary locations, generally idiosyncratic mixes of strategy rather than any logical progression of focus related to process of globalization(Harzing, 2001, Harzing & Van Ruysseveldt, 2004) . The literature gives most attention to recruitment and selection of expatriates and international managers, talent management at HQ or local level, and more flexible forms of international business travelers, virtual

teams and impatriates (Scullion & Collings, 2006). Briscoe and Schuler noted that the definition of international employee inside organizations continues to expand: "… the tradition of referring to all international employees as expatriates – or even international assignees – fall short of the need for international HR practitioners to understand the options available…and fit them to evolving international business strategies [(Briscoe and Schuler, 2004)".

In the context of international resourcing, this now includes a fragmentary group of individuals, ranging from: contract expatriates (Baruch and Altman, 2002), assignees on short term or intermediate term foreign postings (Morley and Hearty, 2004, Mayerhofer, Hartmann, and Herbert, 2004) ; international transferees (moving from one subsidiary to another) (Millar and Salt, 2006); virtual international employees active in cross-border project teams (Janssens and Brett , 2006) ; self-initiated movers who live in a third country but are willing to work for a multinational (Tharenou, 2003); immigrants actively and passively attracted to a national labour market and domestically based employees in a service centre but dealing with overseas customers, suppliers and partners on a regular basis . Millar and Salt draw attention to a number of factors that have increased demand for new forms of international mobility (Millar and Salt, 2006) : the need for skilled expatriates to help build new international markets (Findlay, Jowett and Skeldon, 2000) ; temporary and short term access to specialized talent in sending countries to assist the execution of overseas projects (Minbaeva & Michailova, 2004 and Hocking, Brown and Harzing , 2004), ; and the need for highly mobile elites of management to perform boundary-spanning roles to help build social networks and facilitate the exchange of knowledge (Tushman & Scanlan, 2005).

3. Outsourcing delivery patterns in IT organizations

According to David J. Bryce and Michael Useem, outsourcing is defined as an outside company's provision of the products or services associated with a major function or activity of a user organization (David & Michael, 1998) . The definition of outsourcing is not yet standardized; however, the outsourcing term is much widely used in information technology business. According to Wikipedia, outsourcing is often viewed as involving the contracting out of a business function - commonly one previously performed in-house - to an external provider (Overby, 2007). In February 2004, the members of the President Bush's council of economic advisers stated: outsourcing of professional services is a prominent example of a new type of trade" (Gregory, Kristin, Harvey, 2004). The following are the successful outsourcing implementation patterns due to reduced cost, access to most talented resources at cheaper cost, and 24 X 7 productivity. In the context of outsourcing, Human resources (HR) divisions play vital role to onboard the right resources for the right positions. In order to derive the value proposition of Human resources divisions of multinational companies in the context of expatriate management, there is a need to have clearer understanding of theoretical and practical issues in various delivery models in practice by the IT service organizations. Insight into these models would provide in-depth understanding for increased delight for stakeholders, employees and customers.

The organisational structure logically consists of four parts and conceptually captures the four dimensions business need: Vertical Business Units (VBUs), Horizontal Business Units (HCUs), Regional Business Units (RBUs) and Support Units (SUs) as shown in diagram 1. The four parts of the organizational decomposition need to work collaboratively for financial excellence of the organization, while each of the unit has a definite function and scope of operations. Since the customer demands are constantly increasing to meet their business challenges in the market place, there is a need to develop expertise in multiple dimensions. In large scale IT Service operations; no organization can succeed without sound organizational structure.

The first part is the Vertical Business Units, responsible for project/ product delivery, are based on the customer line of business such as Banking, financial services, Insurance, Telecommunications, Healthcare, Transportation and Logistics, Retail etc.. These units are responsible to onboard the right skilled resources though the Human Resources division, which come under support units.

The second part is the Horizontal competency units, which are responsible to manage the skilled resources with regard to technology such as HCU – SAP, HCU-Microsoft, HCU-Java, HCU-Oracle and Applications, etc. These Horizontal Competency Units (HCUs) cut across all the vertical units. Third part, the regional business units, predominantly captures the regional business, for example RBU- Americas, RBU-Europe, RBU-Asia Pacific etc.
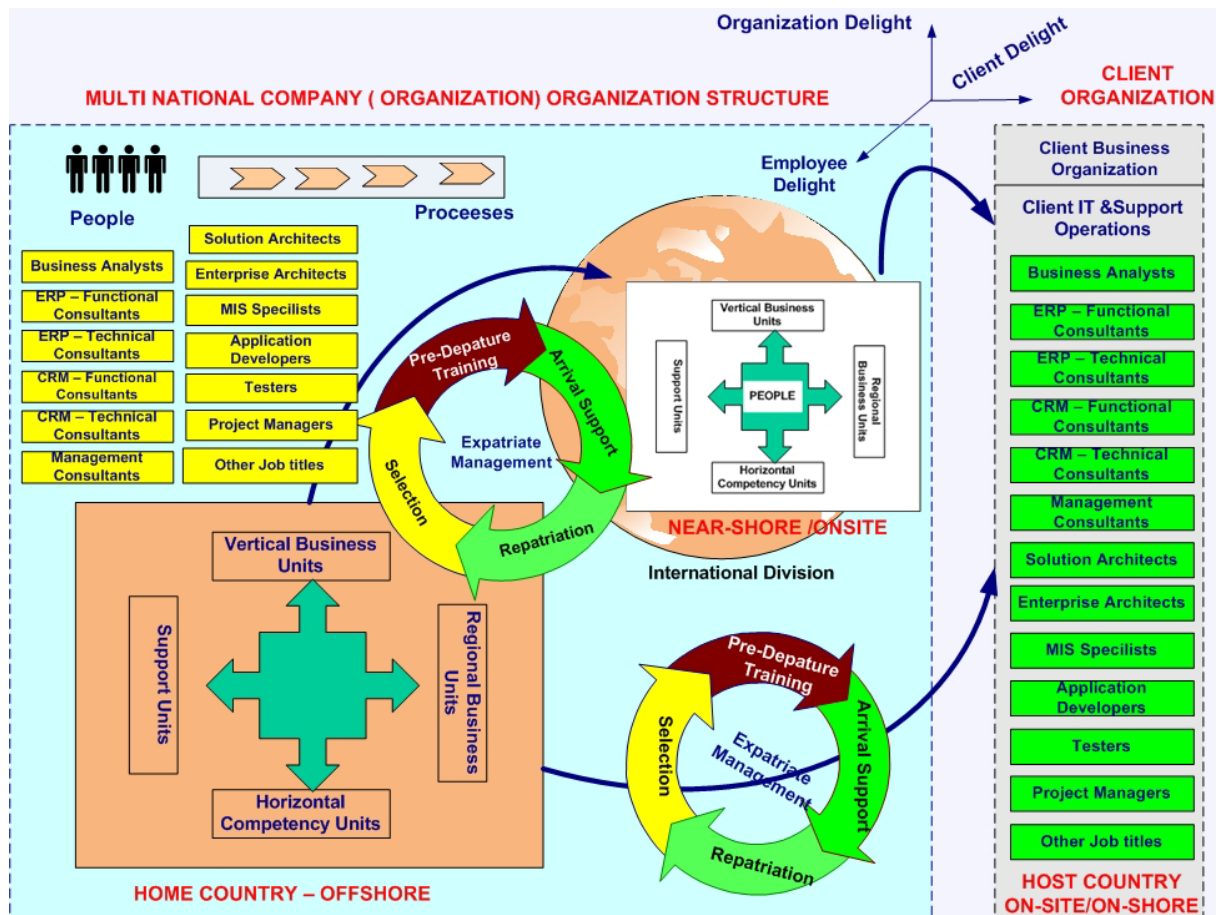
Figure 1: One view of delivery models

The fourth dimension is support units, which are very critical for organizational success includes Human Resources, Finance, and Corporate Services etc. These units are very critical for organizational effective functioning. This paper central focus is on the Human Resources transformation for effective expatriate assignments. Think of four types of units as *the four quadrants* of the organization—once established and converged into a holistic foundation, the envisioned enterprise landscape will emerge—like the roadmap of treasure (value) hunting,

3.1 Onsite delivery model / staff augmentation model

In onsite delivery model, the customer/client would request for skilled expatriates from offshore to work at their location. In nutshell, the customer work will be done by expatriates at client location with lesser cost. Normally this model will be adopted when continuous involvement of client is required at every stage and security of the data and information is required. Also this model is best fitted when the requirements are not very clear. This model is suitable for short term engagements like strategy consulting, due diligence, architecture consulting, roadmap Initiatives and will increase the top line revenues of the off-shoring firm providing services to client.

3.2 Offsite delivery model / near shore model

When the client needs more number of expatriates to deliver and if the client cannot extend the facilities to the expatriates, then the client would prefer the offsite delivery model as the expatriates can use the foreign/subsidiary office to deliver the projects. The only difference from Onsite delivery models is that the majority of the expatriates will work from the same country as the client location /city/near city. This model will enable expatriates to come and conduct face to face discussions and is suitable for medium sized project.

3.3 Offshore delivery model

When the projects need to be done at cheaper / affordable cost, this model is ideally suitable, however this model requires clear planning and should possess clear objectives. In this model, the

project delivery is accomplished at offshore (which is in different country). This type delivery model requires frequent communications with telephone calls and emails as there is no face to face communication.

3.4 Onsite-offshore delivery model

In onsite-offshore delivery model, the work is distributed between Onsite (Client location/host country) and offshore (home country), hence the client/customer gets most benefitted by taking the advantage of talent and time from offshore and expatriates from the same offshoring partner will be available at onsite. The normal distribution ratio of offshore and onsite is 70% and 30%. This model is most successful model adopted by the Multi National companies to deliver projects better and cheaper. This model is preferred by the customer as they see significant benefits - 24 X 7 productivity, Most talented offshore resources at cheaper cost, access to well trained expatriated to communicate on day to day basis and less burden with the administration issues.

4. Expatriate transformation canonical framework and benchmarking

It is proven for so many years that expatriates are critical for organizational success as they act as ambassadors. The organisational support in deploying the right staff is paramount consideration for sustainability; hence the dynamics involved in expatriate management process should be clearly understood by the HR staff to create the value proposition. HR professionals are expected to be skilled and effective partners to line managers in increasing organizational performance. In 2010, The RBL Group interviewed nearly 400 HR professionals and business leaders across industries and geographies, specifically targeting HR effectiveness in the area of consulting skills (Dave Ulrich, 2010). The suggested Expatriate transformation canonical framework is very useful to the IT organizations in transforming the offshore talent for global needs. The purpose of this framework is minimizing the expatriate dependencies across different business units (verticals) and competency units (technology units) in different geographic locations. The following diagram depicts the expatriate movement between locations based on the project needs.

The transformation of expatriate resource is very critical within and outside of the organization. The Expatriate transformation canonical framework is represented in diagram 2 below indicating the variables that need to be considered at a high level. These variables may likely to change based on the patterns and practices of the organizations, specifically in IT companies, across the globe. The variables that we have considered are – Role type, skill type, resource type, duration of the assignment, project type, Immigration type etc. These variables have the higher degree of impact on the quality of the expatriate resource selection, to be deployed for a given request. In other words, in every expatriate selection, the set of influencing parameters are different based on the variables of the expatriate request.

In order to excel in providing best-in-class expatriates, the canonical framework should be used with the suitable adapters for the transformation of the expatriate request and expatriate response. The adapter selection is most critical action in the framework as the adapter would bring standardization of request and response in the organization. The adapter should be able to intercept the expatriate request and extract the canonical model dependent variables appropriately to obtain the exact response. Most IT organizations traditionally follow Hub and Spoke resource model for expatriate resources fulfilment activities without the right level of transformation, there by it is observed the higher degree of failure. With the adoption of the canonical model based transformation framework and the combination of geographic client request adapter and MNC delivery adapter would parse the request and take the responsibility of transformation and provide insight into the expatriate dependent variables. Hence the first transformation takes place from business unit expatriate resource request message to pool to transform organization protocol / common organization language. The request has several input parameters like duration, type, skill, role, etc. These parameters will be used in determining the right expatriate for the assignment request. This framework has the flexibility to add new types of expatriate requests.

In financial crisis times, careful considerations should be practiced to move the associates from offshore (home country) to onsite (host country) / near shore (close to onsite) due the several factors - including the immigration considerations, cost involved in relocation, training etc, hence, at every step in expatriate management life cycle, As shown in the figure 3, the expatriate movement take place from Offshore to onsite, Offshore to near shore and near shore to onsite based on the canonical model dependent variables.
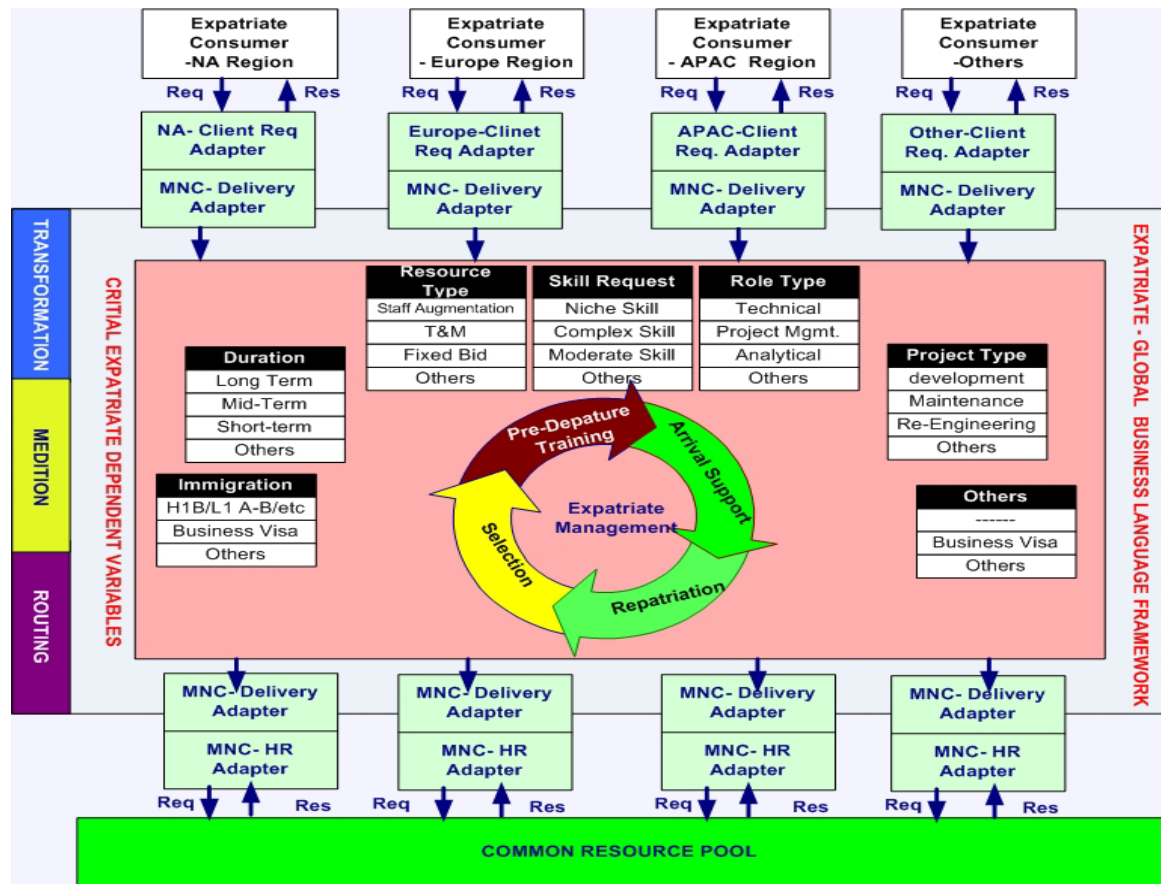
Figure 2: Expatriate transformation canonical framework

Notation: **Req** -→ Expatriate Request **Res** → Expatriate Response, **MNC** – Multi-National Company, **APAC** – Asia Pacific, **T&M** – Time & Material
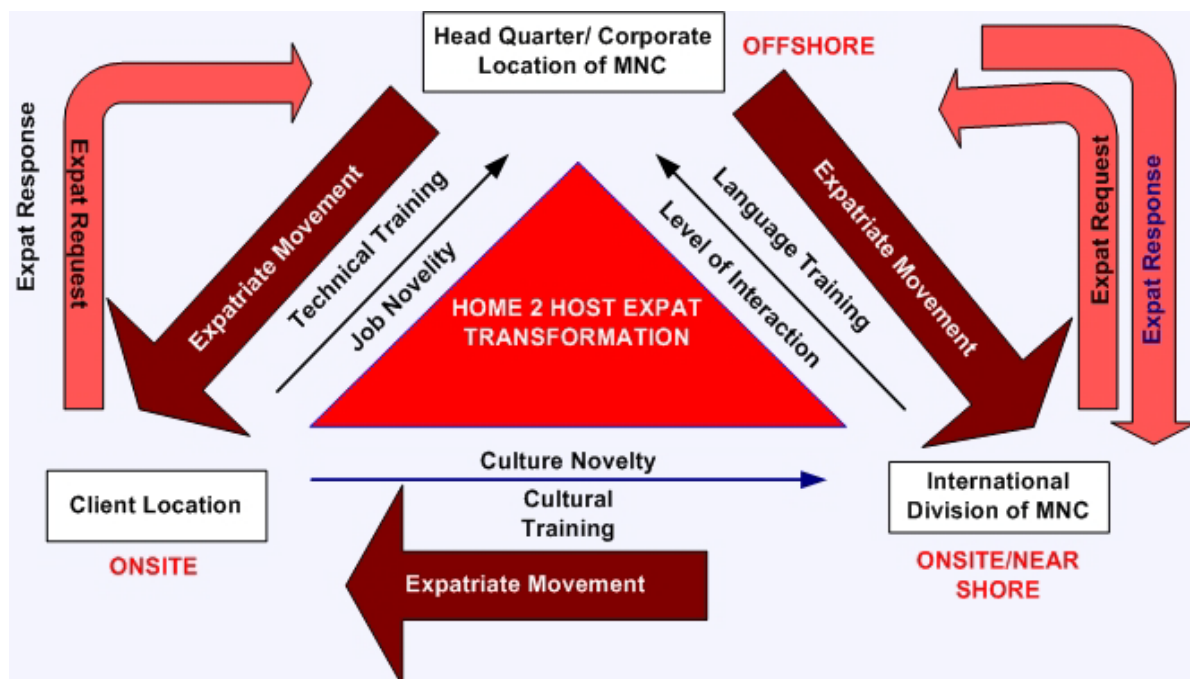

Figure 3: Expatriate movement beyond boundaries

Typically expatriate management/ training and other related activities will have their own business process and each of these processes will have process steps. Most likely each process step will

deliver some kind of services. These services may internally use all sorts of formats; hence there is a need to transform the messages to a common message format.

5. Expatriate process benchmarking, tool and analysis

According to Gartner survey report in December 2010, India is on the top list for offshore services (Gartner, 2010). To investigate the Expatriate management and training practices for HR excellence to meet the on demand needs, the authors have selected the MNCs having operations across the globe. According to the research study conducted by the co-authors of competing on analytics, published by Harvard Business Press (Thomas H. Davenport et al, 2010) , 40% of major decisions are based not on facts, but on the managers gut. This philosophy of intuitiveness and experience based decision making process works out well, but most of the times, this kind of decision making leads to organizations disaster. Therefore, the extensive research on the organizations is conducted to study the patterns and practices of expatriation with the process represented in the below diagram Figure 4.
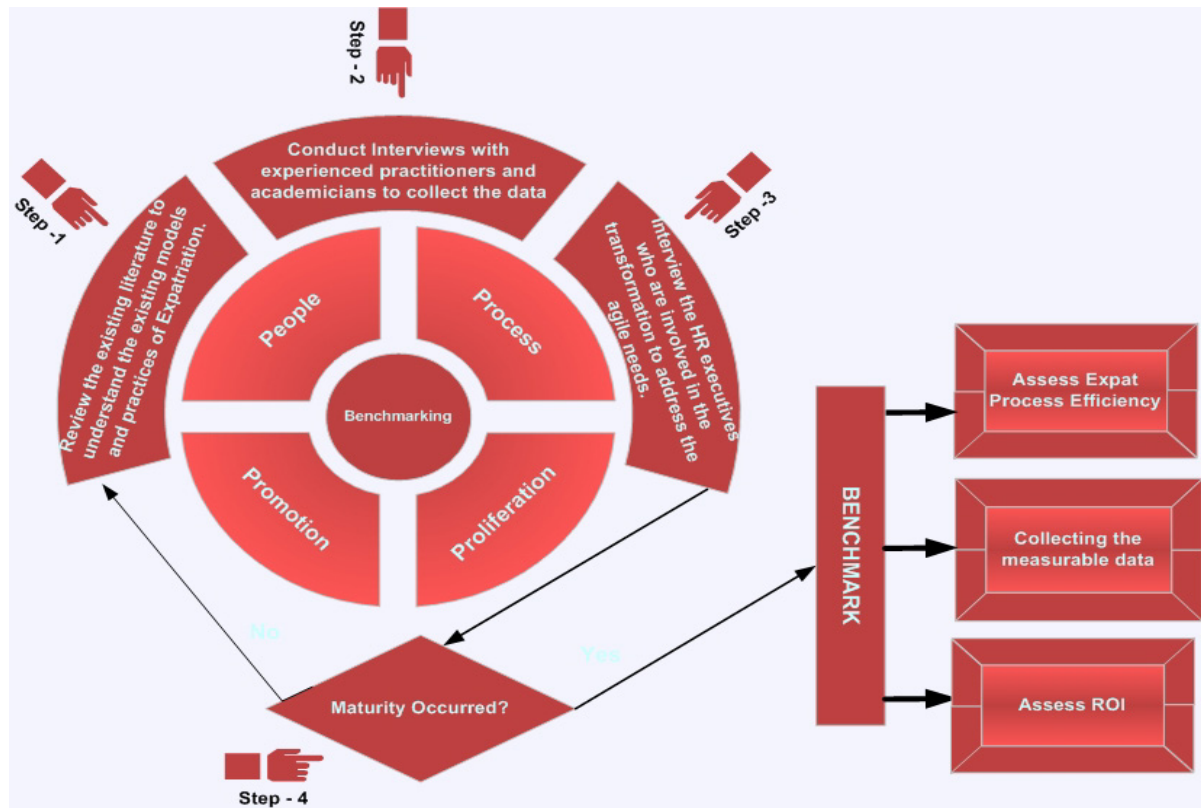

Figure 4: Expatriate process benchmarking

The process of expatriate Benchmarking that we have adopted comprises of 3 critical steps : a)Review the existing literature to understand the existing models and practices of expatriation in the IT outsourcing organizations, b) conduct interviews with experienced practitioners, academicians and collected the data based on the questions that we have formed in 2 dimensions – timeframe and Innovation practices c) Interview the HR executives who are involved in day-to-day operations in fulfilment of expatriate resources for the on demand requirements originating from different parts of the world.

The second step and third step in the benchmarking process is to conduct interviews and collect the data from experienced practitioners, academicians and HR staff operating on the ground day-to-day. In order to begin the interview process, we have chosen professionals from organizations, who were and who have been involved in the expatriate management and related activities. The process of data collection has happened through several channels including personal interviews, web based surveys, paper based survey, telephonic surveys.

As a part of the research study, the questions are organized in two dimensions – timeframe and Innovation to understand the past and present practices to gain the insight of the impact of the

practices. The impact of past and present practices would help in forecasting the future actions considering the organizational strategy. The following are samples of some of the organizations to study, analyze, and benchmark the expatriate practices to increase the top line and bottom line of the organization.
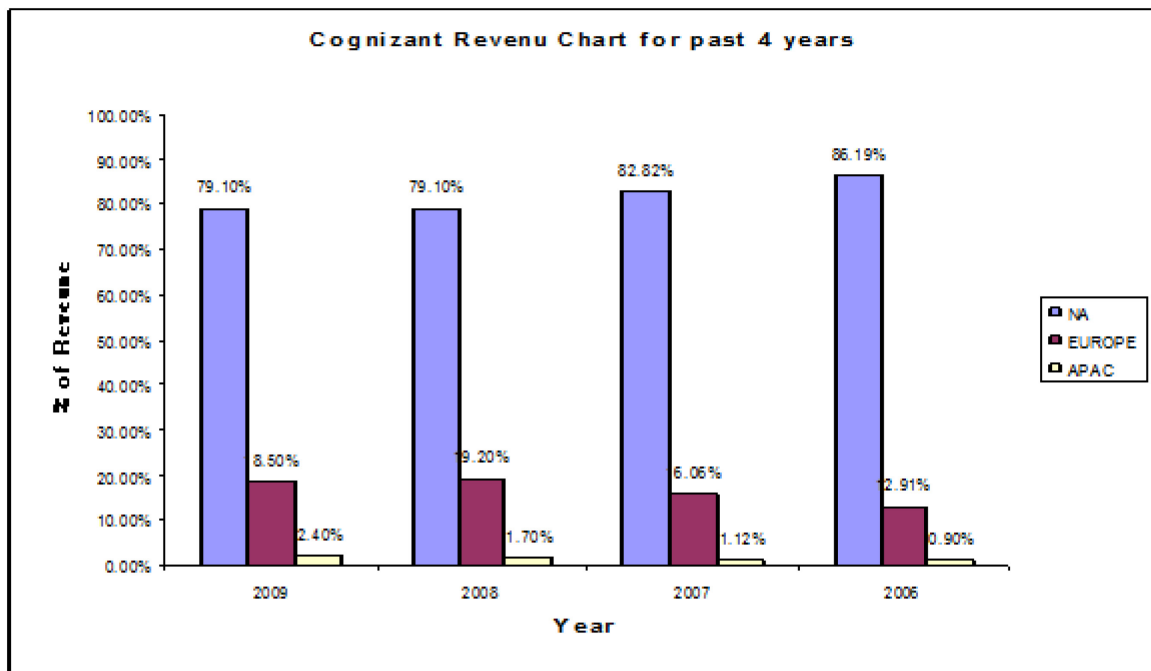

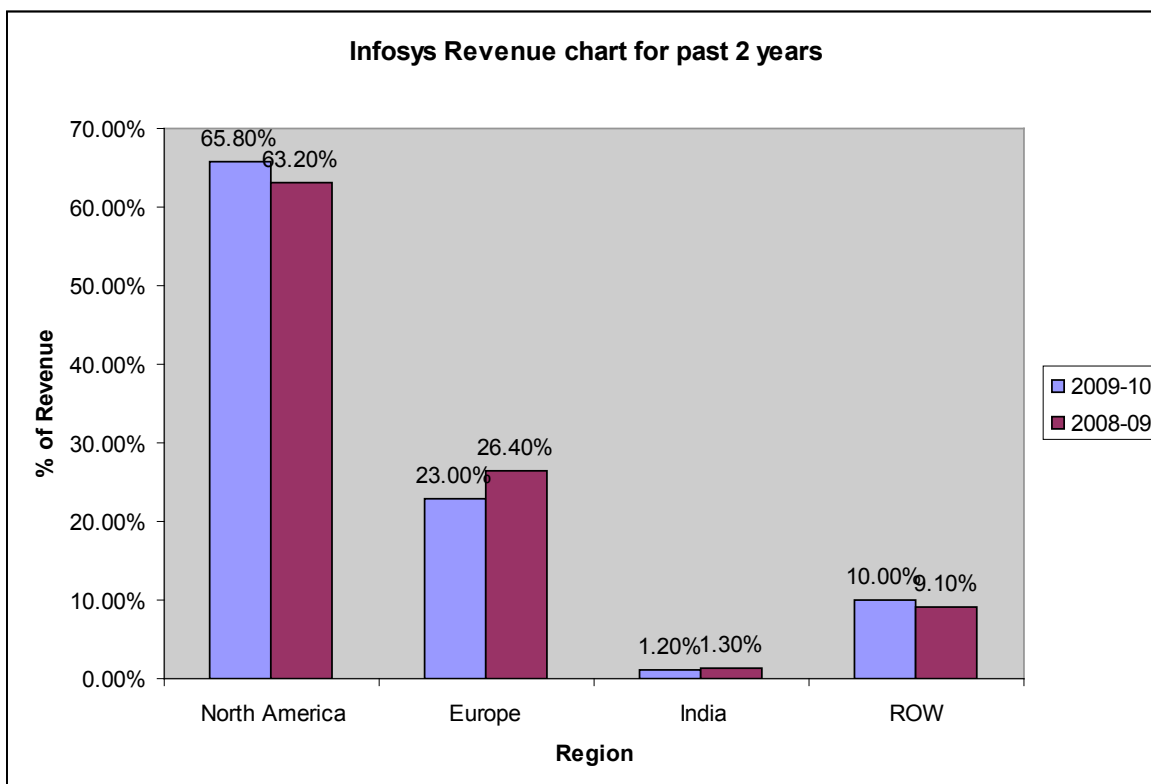**Figure 5**: Cognizant revenue contributions (Cognizant, 2009)

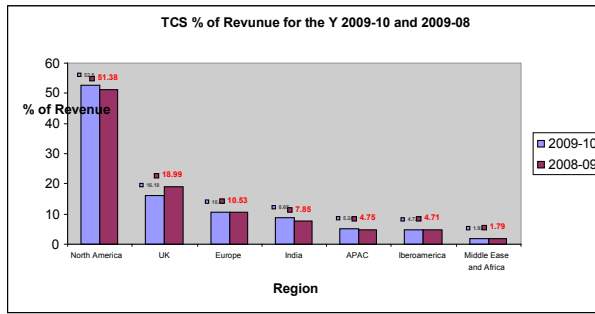**Figure 6:** Infosys revenue contributions (Infosys, 2009)

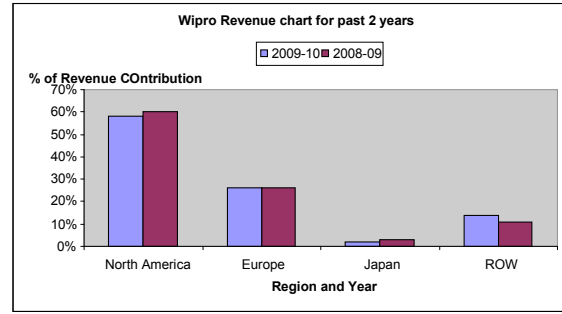**Figure 7**: TCS revenue contributions (TCS, 2009)

Figure 8: Wipro revenue contributions (Wipro, 2009)

The questionnaire has addressed most of the expatriate life cycle questions in the context of IT companies, which includes– pre-assignment (to capture the drivers of assignment from the perspective of assignment key stakeholders), on-assignment (to monitor the deliverables and the progress of the assignment) and post assignment (to help assignment success and synergy to the organization). The criterion that was set for organizations to be a benchmarking partner is that the organization should have a global presence, specifically in North America (NA), Europe and Asia-Pacific which includes India, in conducting IT business.

Table 1: Normalized scores of the detailed survey

Benchmarking Framework Attribute	BENCHMARKING PARTNER																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
Structure of the organization	0.87	0.82	0.81	0.86	0.86	0.9	0.83	0.86	0.82	0.89	0.82	0.89	0.84	0.87	0.86	0.82	0.86
Expatriate Request transformation	0.84	0.85	0.79	0.85	0.86	0.9	0.84	0.84	0.84	0.87	0.82	0.84	0.85	0.86	0.85	0.84	0.86
Expat Planning Automation	0.83	0.82	0.79	0.82	0.84	0.87	0.82	0.82	0.82	0.84	0.79	0.83	0.84	0.84	0.84	0.81	0.83
Expat Screening Automation	0.9	0.69	0.67	0.75	0.69	0.72	0.68	0.76	0.68	0.74	0.68	0.85	0.69	0.79	0.69	0.68	0.77
Expat Interviewing and Automation	0.87	0.73	0.71	0.76	0.74	0.69	0.74	0.76	0.73	0.73	0.73	0.87	0.72	0.74	0.74	0.73	0.71
Expatriate Selection Automation	0.81	0.87	0.84	0.86	0.89	0.91	0.87	0.84	0.87	0.92	0.85	0.81	0.89	0.89	0.83	0.87	0.85
Immigration Process Automation	0.74	0.84	0.82	0.91	0.85	0.89	0.84	0.88	0.83	0.89	0.83	0.79	0.85	0.88	0.85	0.83	0.81
Training Automation	0.89	0.82	0.82	0.81	0.87	0.93	0.83	0.85	0.82	0.91	0.82	0.85	0.84	0.87	0.84	0.82	0.84
Depature/Deputation/Onsite transfer automation	0.81	0.81	0.81	0.79	0.81	0.88	0.83	0.83	0.81	0.85	0.81	0.81	0.81	0.86	0.81	0.81	0.79
Arrival Support Automation	0.83	0.78	0.76	0.82	0.79	0.92	0.79	0.85	0.76	0.91	0.76	0.83	0.79	0.89	0.79	0.76	0.75
Strategic Partnering	0.82	0.75	0.69	0.78	0.75	0.95	0.75	0.79	0.74	0.82	0.71	0.82	0.74	0.81	0.74	0.71	0.76
Expatriate Service Development	0.78	0.68	0.52	0.75	0.79	0.7	0.69	0.78	0.67	0.81	0.62	0.74	0.71	0.79	0.71	0.62	0.77
Sum of the Normalized Scores	9.99	9.46	9.03	9.76	9.74	10.26	9.51	9.86	9.39	10.18	9.24	9.93	9.57	10.09	9.55	9.3	9.6
Score Ranking	**4**	**13**	**17**	**7**	**8**	**1**	**12**	**6**	**14**	**2**	**16**	**5**	**10**	**3**	**11**	**15**	**9**

The above graphs clearly show that the organizations with good recruitment practices stand in top position; thereby the authors have arrived at the best practices in the next section.

In order to find out the results and observations, the original sample included 100 associates from each firm were identified. With 69% of participants, the data is collected on technology, managerial and behavioral skills.
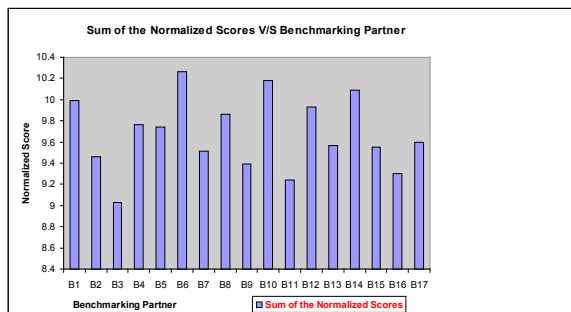

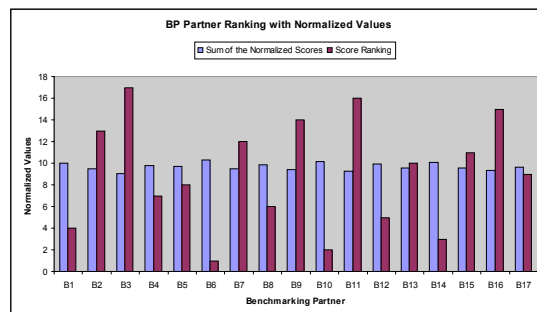**Figure 9**: Normalized scores with survey results

Figure 10: Ranking with survey results

Statistical analysis are performed to obtain the top most recruitment metrics – Full productivity, Quality of Service, Quality of Promotion and Knowledge Management of expatriates for mid to long term duration. The results are captured after the research, analysis and screening using Expatriate transformation framework.
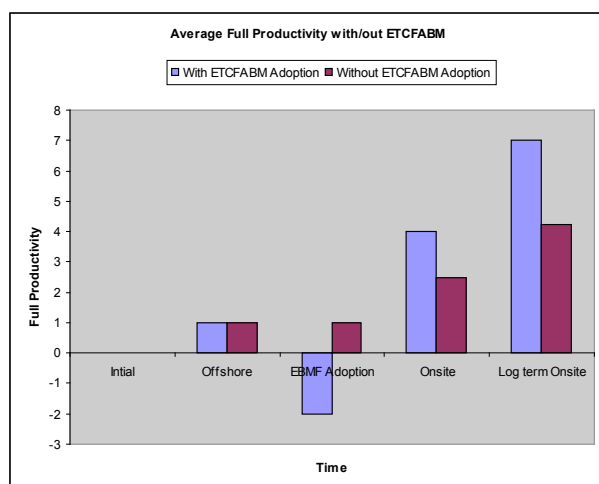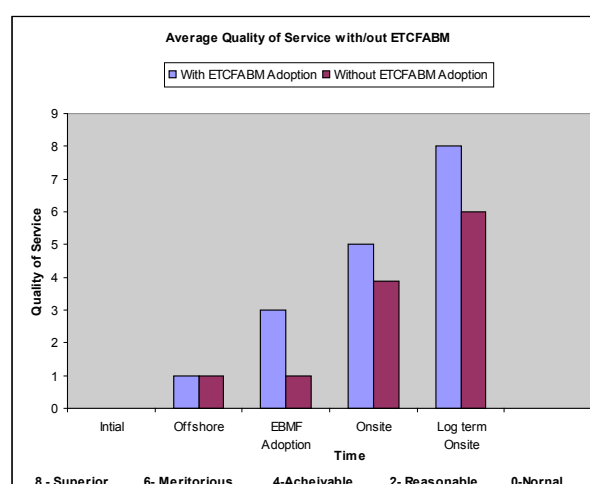
Figure 11: Average full productivity

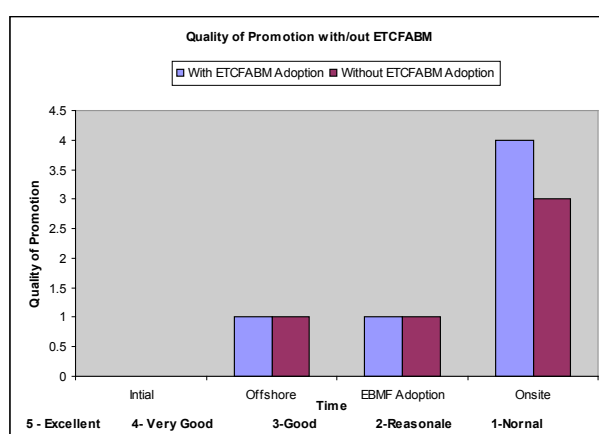**Figure 12**: Average quality of service
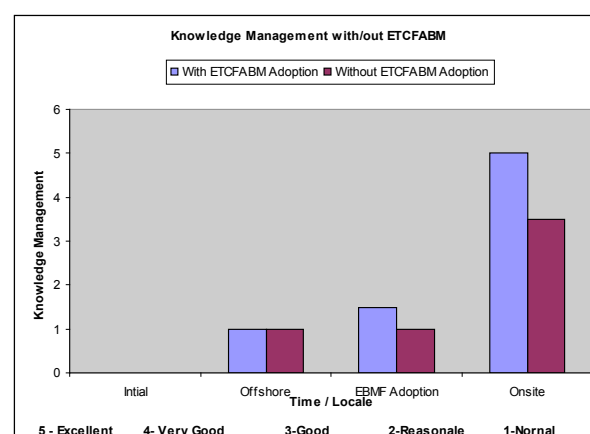

Figure 13: Average quality of promotion

Figure 14: Average knowledge management

Quality of promotion is an important metric for branding. This parameter will have increased influence of people, processes and opportunities of the expatriate representing organization.

6. Conclusions

In this paper, we have proposed expatriate transformation canonical model for expatriate resource requirements fulfilment needs originating across the globe for IT services organizations. Following the IT services industry, we have followed the benchmarking methodology and used a template to understand the past and present practices of expatriate functions as part of human resource management practices and extrapolated the data for the future expatriate operations by strategically building the manageable operational model by utilizing and tuning the organization culture. Currently, we are replicating our success to more divisions of a IT Services company, and would like to share our insights with fellow practitioners and decision makers in the industry.

Different from existing literature and practices, the proposed expatriate transformation canonical model is closely connected with organizational processes, transforms towards a resources services centric platform, and creates a value proposition for customer and employee and thereby other stakeholders. By adopting the proposed framework, identification of the right resource for the right opportunity becomes simple due the standardization of the request-response model, which in turn creates revenue growth for the organization and provides delight to customer, associate and organization.

7. Future trends

In the days to come expatriate processes would be completely modernized and automated. The use of technology in the sector continues to increase at a remarkably faster pace with technologies hence; organizations have to be on top of technology and competencies along with the deep domain

knowledge to address the future expatriate resource fulfilment needs. Expatriate processes would become more efficient and robust and fully integrated with the overall organizational objectives. Firms will have to pay high attention to ensure that the expatriate solutions address the employer branding and regulatory compliances issues. The focus on building passive candidate pool and diverse recruitment would increase tremendously. High attention will be paid towards achieving collaboration between the hiring Manager and the recruiter.

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