

## **Cortesia Coches: moving beyond borders**

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### **ABSTRACT**

*Cortesia Coches: moving beyond borders* is a case focusing on and integrating cross-cultural management and human resource development concepts with a firm in the third stage of internationalization. The case encourages the examination of roles, perspectives and strategies for differing operational staffing options related to the sourcing of unit leadership talent and the resulting cross-cultural preparation and experience of managers in the firm. The firm is internationalizing its operation through acquisition. The case examines the influences of national and corporate cultural elements and engages learners on the success implications and human resource development counter-measures possible to mitigate negative impact on employees, the firm and the communities in which the company operates. The case has two parts. The first is appropriate for an hour-long class through case set up, team analysis and facilitated discussion on varying merits of international staff sourcing options. The second involves out of class team activities to develop and prepare a proposal presentation as an HR consulting practice. The case is appropriate for upper level undergraduate students and first year graduate students who already have familiarization with foundational knowledge of HR functions and wish to deepen their understanding of these areas through application in an international case context. The events on which this case is based are real but with identifiers altered. The case is presented with student materials, instructor notes and an evaluation rubric.

Keywords: international, human resources, expatriate, cross-cultural, staffing

Note: This is a fictitious case developed for educational use. All statements, names, numbers, dates, etc. used herein were created for the purposes of this case and should not be construed as factual. Any resemblance to any actual organization or individual is purely coincidental.

## **CASE STUDY – CORTESIA COCHES: MOVING BEYOND BORDERS**

As the chair of the board for Cortesia Coches brought the gavel down with a loud sense of finality, Juanita Fernandes was struck by the excitement of the decision just made. Underneath the board table she clinched her left fist in private affirmation to herself. As she looked about the table to the rest of her executive team, who were all looking toward her with smiles beaming, she knew it was a moment to celebrate their hard work, a major company milestone and her first major achievement as President and CEO for Cortesia Coches. They would have that well-earned celebration.

However, the enormity of the task was not lost on President Fernandes. Making the decision to take the company international would be easy compared to the task of being successful in that endeavor. While she was familiar with international operations from her previous experience as VP of operations for a regional hotel chain, she knew her team was not. She could rely on the 30-year history of her company in the car rental business but would need to augment this industry experience with international expertise to inform a cross-border expansion of company operations.

And she would need to move fast! The board had just approved her recommendation to acquire Belizean Auto Rentals in a timely leveraged buy-out. Getting up to speed with operations and generating positive cash flow would be critical to maintaining the company's financial stability. President Fernandes knew that not all members of the board welcomed being put in this vulnerable position. There was a commitment by several members of the board to monitor developments closely.

Company Background: Cortesia Coches, Inc. (Courtesy Cars) operates 13 car rental sites throughout the Yucatan Peninsula of Mexico. Juan Carlos Gonzales, a local political leader and businessman, started the company in 1980 and sold it in 1995 to an investment group. Holdings included an inventory of 60 vehicles, company operations and valuable rental sites located in tourist centers. The growth of his entrepreneurial venture coincided with a coordinated move by the federal government of Mexico and regional governments within the Yucatan to establish a tourist destination. Infrastructure was developed to draw tourists toward the pristine beaches of the Gulf of Mexico as well as the nearby historical ruins of Mayan civilization – a match perfect for a car rental business where road travel between sites is required. Since the sale, Cortesia has expanded along with tourism throughout the region under the leadership of two different CEOs. Until 2005, Gonzales' successor was aggressive with expansion, sometimes at the detriment of company financial stability, establishing a corporate headquarters, adding five sites (some owned and some rented property), creating a call center nurturing repeat business and growing the fleet to 180 vehicles. However, he had difficult relations with the board due to poor cash flow planning. The next CEO halted expansion and restored fiscal stability during his short tenure, regaining trust of the board but losing faith with his staff before having to step aside. A fiscally driven hard-nose, he did not recognize human capital value or the subsequent impact that lack of appreciation would have on customer relations and sales.

Cortesia's current CEO, Juanita Fernandes, was brought onboard in 2007 to move the company to its next level of operation. She formerly served as a vice president of operations for a mid-size hotel chain operating in Mexico and is quite familiar with the tourism industry generally. Since joining Cortesia, she has successfully added another four rental sites to the nine she inherited and increased Cortesia's brand recognition and profit margin through a strategy-driven, team-based corporate culture focused on quality customer service. Fernandes enjoys the

support of her executive team and was featured on the June 2010 cover of the Yucatan's leading tourism industry publication, Yucatan Gold. She spent much of her article interview lauding the accomplishments of her leadership team with statements like, "No one of us can create the success that together we generate every day. That's the secret of Cortesia, a unified focus on quality customer service – while cars are what we rent, our customers return because of experiences with our people." Cortesia enjoys a high rate of repeat rentals and referrals now, key benchmarks in the industry.

Last month Fernandes announced her decision to take the company international with the purchase of a car rental agency operating in the neighboring country of Belize. Belize, like the Yucatan, is rich with great beach recreation and Mayan history but currently lacks the recognition enjoyed by the Yucatan from U.S. travelers, a primary market. Belizean Auto Rentals (BAR) operates seven properties with a similar market focus and placement as Cortesia. It seemed a well matched acquisition for Cortesia and may position the company for entry into the steadily growing Belizean travel market.

Fernandes's announcement of the BAR acquisition foreshadowed her long-term vision. When making the announcement of the acquisition she was clear on her intent for Cortesia to become a regional player in the car rental business. "Expanding our service area is not only a strategic move for Cortesia, it is what our clients demand," Fernandes stated, "and with more service territory we can offer our clients the exceptional service they've come to expect, a frequent user program to retain their business and a market position to increase our bargain power with respect to growing our fleet." While Fernandes did not specify future acquisition or expansion targets, she has directed her leadership team to include in the strategic planning process, now underway as a result of the action taken by the board, a review of the potential for growth in the Central American and Caribbean regions.

**The Situation:** Following the board meeting, you and your team of HR consultants have been contracted by Fernandes's office to provide tactical direction and support for this initial international move for blending the cultures and company practices of the acquired Belizean company. Fernandes knows that success for the long-range vision for the company is contingent on success with this initial venture. A lot is at stake! Moreover, investors are watching this move closely since they are concerned with maintenance of Cortesia's brand value and financial stability. Fernandes also understands that an international expansion is not simply replicating current operations in a new country; international expansion involves careful planning and appropriate investment, but she is not quite clear on how to balance the demands of a differing national and cultural setting with the preservation of organizational values and practices. Fortunately, this is the expertise of your firm!

**Opening Task:** Cortesia's expansion into Belize has excited the site management team, especially with the recognition that Fernandes has built considerable good will and trust through reinforcement of promotional opportunities and careful succession planning. Site managers oversee operations at various Cortesia locations where customers pick-up and return vehicles. Because of advancement opportunities, a majority of the site managers indicate a desire to play a role in the international expansion, but all confess to knowing little about the diverse cultures and languages of Belize beyond their own. Fernandes has a short turn-around period of four weeks for the management staffing, rebranding and operational retooling of the former BAR sites before the tourist season kicks into high gear. Further, it is critical that a positive cash flow is generated quickly to offset the debt service on the newly acquired fleet. She wants Cortesia to be ready with a management presence in Belize soon!

Based on what you and your HR consultancy team know at this point, you are being asked to recommend a strategy for sourcing general managers for the newly acquired sites. As company loyalty at BAR was not high and the impending sale of the company was leaked well in advance, over 75% of the staff and five site managers left for employment elsewhere. The remaining two managers were simply unable to secure employment before the change. You are being asked to recommend a selection strategy for establishing new leadership for each site – site managers – by advising if Cortesia should engage parent country nationals (PCNs), host country nationals (HCNs) or third country nationals (TCNs). In this case, PCNs would be from Mexico, HCNs would be from Belize while TCNs would be from any other country. You and your team are asked to prepare a short three-minute position statement on the advantages and disadvantages for each RELEVANT TO THIS SITUATION as well as your recommendation for action. Be prepared to present your position in class.

The remainder of the assignment is to be completed outside of class with your team. As directed by the instructor, you will prepare a presentation as a consulting agency pitching your ideas on the best approach for each of the following needs.

- Task #1: After considering your presentation, Cortesia's senior management has determined that investor concerns on quality control of the brand are paramount and that PCNs selected from internal candidates will be considered, especially in light of the promotional policy advanced by Fernandes. Additionally, given the need to act quickly to fill the positions, the recruitment and selection of candidates has been outsourced by Cortesia to your firm. You are asked to prepare a recruitment advertisement for the site manager position that echoes the company ethos and reflects the main and location specific tasks, duties and responsibilities (TDRs) as well as the knowledge, skills and abilities (KSAs) for the job. Your advertisement should be constructed so that it can be sent to current managers at the varying sites through email distribution. You will present your recruitment advertisement as part of a final proposal presentation.
- Task #2: Assume your advertisement was effective and generated considerable interest with 10 current site managers at Cortesia submitting letters of interest for the 7 vacancies. Cortesia's management team knows candidates quite well but it is important to Fernandes that the process be viewed as fair and objective so that rejected candidates maintain a commitment to the company. In the interest to ensure quality selection and placement, Cortesia has contracted your firm to design a selection process through which all candidates are to be considered for placement at the Belizean sites. While Cortesia has no constraints on selection costs, time remains a key issue so the selection time frame must be kept to a minimum when bringing managers in from varying sites. Using what you know about Cortesia and the role for the site manager position, design a selection process for Cortesia to use in the effort to fill site manager vacancies in Belize. You will present your selection process as part of a final proposal presentation.
- Task #3: Since managers will be living in a national setting different from the parent company with it's own currency, compensation standards and legal requirements, you are asked to develop a compensation proposal for site managers comparable to that of the company but adjusted to the difference in living standards. The average annual salary for site managers in Mexico is 325,000 Mexican Pesos plus spot bonuses. While information on Belizean compensation rates demonstrate that base compensation is slightly more than that paid by Cortesia, bonuses are not common and have not been provided as part of the BAR compensation system. Determine your recommendation(s) for a total compensation

package for site managers based on the company average for working and living in Belize. You may include non-financial benefits. You will present your compensation plan as part of a final proposal presentation.

- Task #4: Cortesia plans to be operational with new PCN site managers in place for the start of the new tourist season in approximately one month. Since each expatriate manager will be from existing company operations but Cortesia has no previous international experience, it will be necessary for training to address cross-cultural matters but not operational matters. Given the short time frame and training content with which Cortesia is unfamiliar, Fernandes's office needs the expertise of your firm to design and conduct a training program to prepare these managers for their new role. They have specified that training should be composed of two parts: pre-departure training and continuing development in Belize. Further, they have specified that since the national language of Belize is not Spanish, introductory language instruction must also be a part of the preparation program. Design a training program that addresses the objectives and specifications of Cortesia and be sure to address who (assumptions about learners), what (content of training), when (timing and frequency), where (location of training), how (format of training) and why (training objectives and outcomes) for each respective part. You must also include in your plan how the training program will be evaluated. You will present your training plan as part of a final proposal presentation.
- Task #5: Fernandes's team at Cortesia has learned that the success rate of expatriate placements is quite low and that the company could fail to receive sufficient return on investment for the costs associated with training and relocation of site managers. She wishes to minimize this risk and has asked your firm to prepare recommendations on resources Cortesia should seek to support expatriate site managers in Belize. Your recommendations can include reference to outside resources of which Cortesia and the expatriate site managers can take advantage to support sustained commitment to the international assignment. It is hoped that a good system can be established for replication as Cortesia continues international expansion. You will present your expatriate support plan as part of a final proposal presentation.
- Final Proposal Presentation: As President Fernandes recognizes the enormity of the task she gives your team, she also knows that she made a wise choice in outsourcing these human resource needs. This frees her and her team to focus on other objectives related to the acquisition, rebranding of BAR and repositioning the company as a regional player. However, she reminds your team that people have always been the key to her organization, for which linking of the human capital contributions to firm success is very much a part of the organizational culture she cultivates. On this she makes clear there can be no mistake; she expects excellence from you and your team.

Your HR consultancy team is asked to present your recommendations in a presentation to Cortesia's leadership team. Your team should have an identity as well as a consistent professional presentation styling with all team members represented so Cortesia can see with whom they will be partnering. The presentation should demonstrate the expertise of the consultancy team without over-reliance on narrative information – more presentation, less reading – as Cortesia will need to take quick decision-making action in assigning the project. And on that note, the project is quite lucrative but your HR consultancy is not the only firm vying for the contract. So, do your best!

## **TEACHING NOTES – CORTESIA COCHES: MOVING BEYOND BORDERS**

This case is designed to give students with a foundational knowledge of human resource functional areas an opportunity to employ and expand their knowledge of these areas as would be necessary in a firm's first stage internationalization effort. In so doing, students apply both human resource and cross-cultural theory to an applied situation. Moreover, this case will expose students to the unique challenges of managing cross-border expansion. As students will work in teams in the development of a proposal presentation based on their role as an independent consulting practice, they will have the opportunity to discover cross-national and cross-cultural differences, consider the implications of varying decision options as well as formulate and defend a short-term tactical approach based on a long-term strategic direction.

### **Course Application**

This case is appropriate for an introductory human resource course in a business curriculum at both the undergraduate and graduate levels after a foundational understanding of functional human resource areas has been established. Additionally, this case is appropriate for an international human resource course.

### **Learning Objectives/Outcomes**

In completing this case, students will:

- gain practice in interpreting foundational HR concepts into an international context;
- understand the primary differentiators with respect to sourcing employees as parent country nationals, host country nationals or third country nationals;
- make choices and defend actions based on both tactical objectives as well as strategic direction as they impact a firm's corporate culture and organizational identity; and
- demonstrate competence in team role contribution with respect to effective information gathering, decision-making, task planning and proposal presentation.

### **Teaching Resources**

The case, Cortesia Coches, is a comprehensive introductory case focusing on the international dimensions of several HR functional areas. It does not cover all HR functions. However, it does provide students with practice in interpreting the internationalization dimensions in the areas of strategic HR, recruitment and selection, training and development, compensation and benefits as well as expatriate support services. The case is composed of company background, situational challenge and six tasks. At case introduction students are provided with the background and situation. After identification of case teams, each team should be given time, estimated to be 20 minutes, to discuss and determine a position statement with respect to the use of parent country nationals, host country nationals or third country nationals in the context of the introductory material of the case. After presentation and instructor-facilitated discussion on the merits of the teams' position statements, teams are assigned five tasks to complete in preparation for a forthcoming class presentation. Presentation outcomes and specifics are left to the discretion of the instructor. Estimated time will vary based on the size of the class.

Students may already be familiar with the terms parent (or home) country nationals (PCNs), host country national (HCNs) and third country nationals (TCNs). Either way, it may be helpful to review these definitions as well as the term expatriate as the opening task is assigned (Noe, Hollenbeck, Gerhart & Wright, 2010). For the opening task, students working in teams are to review what they understand about the pros and cons of staffing with each respective sourcing type for international placements (PCNs, HCNs or TCNs) and then consider their application with this case context in rendering a sourcing recommendation for unit leadership of the newly acquired properties. As teams report out, sample comments on the pros and cons might include:

- PCNs
  - Pros
    - Familiarity with company culture, policies and operations
    - Experience with company leadership
    - Experience with brand
  - Cons
    - Potential difficulties with host culture, laws and customs
    - High cost of training and maintaining expatriate employees
    - Family adjustment considerations
- HCNs
  - Pros
    - Familiarity with home country culture, laws and customs
    - Lower cost of hiring and transition
    - Possible in-country cultural experience with vendors and customers
  - Cons
    - Potential difficulties with parent company culture, policies, leadership and operations
    - Communication challenges in dealing with parent company
    - Potential lack of opportunity for promotion in parent company enterprise
- TCNs
  - Pros
    - More objectivity to cultural differences between parent and host country operations
    - More globally minded career individuals
    - May offer cost containment depending upon home nationality of TCNs
  - Cons
    - May encounter difficulties with host country acceptance
    - May have high cost implications with transition and support

In debriefing, the instructor may wish to focus the discussion toward Cortesia's long range goals and facilitate a discussion on the merits of establishing a global staffing philosophy (DeNisi & Griffin, 2011). Helping students understand the differences between an ethnocentric, polycentric and geocentric philosophic approach to staffing will introduce students to the strategic decision considerations between short-term objectives (i.e. staffing newly acquired sites within four weeks) and long-term directions (i.e. developing a framework for replication in continued expansion throughout the Central American and Caribbean regions).

The case presents with an ethnocentric decision by leadership at Cortesia Coches in the execution of the remaining tasks. While the aforementioned debriefing may result in a conclusion that a polycentric or geocentric staffing philosophy is preferable given the long-term goals, in fact many organizations in a third stage internationalization effort will elect, as the leadership does in the case of Cortesia Coches, to follow an ethnocentric approach (Gomez-Mejia, Balkin & Cardy, 2010). A discussion may be beneficial as to the merits of this choice including incorporation of a successful corporate culture into a subsidiary culture that seems less than ideal for the transition, exercise of close control over the subsidiary to accomplish swift export of company operations, utilization of familiarity by managers with technical and operational functions in addition to company policies, procedures and brand preservation.

The remaining tasks for this case are to be completed in student teams as homework for an in-class presentation at a later time. Of course, instructors should modify as needed.

- Task #1: As the opportunity for ad distribution is via the company email system in pursuit of internal candidates, student teams should recognize the value of crafting an enticing recruitment ad that is not limited by space or cost. Teams should recognize that current site managers are probably already familiar with general tasks, duties and responsibilities (TDRs) for a property manager (which can be found from a search on the O\*Net system with which students should already be familiar) since they currently hold similar positions within the company. However, the TDRs can be nuanced and presented in the ad from the perspective of the cross-cultural context. Likewise, teams should include the knowledge, skills and abilities (KSAs) required for a site manager in the ad but, particularly, should identify additional cross-cultural competencies within the ad that may be necessary for expatriate success. Exceptional work will reflect an investigation into the country specific differences between cultural and structural operations in Mexico as compared to Belize with reflection of that investigation into the TDRs and KSAs for the site manager advertisement.
- Task #2: Teams will draw on a range of selection methods based on prior familiarization from the study of human resource staffing and a diversity of approaches should be welcomed. However, teams should make strong linkages between the advertisement developed in task 1 around the TDRs and KSAs such that there is a clear and valid connection between the selection criteria and selection predictors/tools. Careful attention should be given to the KSAs and selection methods related to cross-cultural competencies. Exceptional responses will include criteria and predictors addressing cultural adjustment, cross-cultural communication (including language), cultural intelligence (including empathy), and personal/family preferences. Further, exceptional work will highlight the cross-cultural selection application by country as applied between Mexico and Belize.
- Task #3: Teams will respond with an analysis of the currency conversion and their justification for compensation levels based on cost of living differences. Further, teams may include a justification for additional compensation structures related to align with parent company norms or host country practices (e.g. bonuses) and compensation adjustments for relocation, family support and travel. Exceptional responses will have investigated compensation and benefit differences between the two countries and make adjustments to reflect keeping the employee financially whole (possibilities include tax equalization and differences of mandated benefits between the countries).

- Task #4: Teams will also draw on a wide range of options in considering the pre-departure training as well as continuing development once placed on site in Belize. Teams should focus on cross-cultural and cross-national training, avoiding the need to train in this case on operational TDRs with which site managers should already be familiar given their previous positions in the company, except where the international aspects are identified. Team responses should include assessment, the variables related to training (who, what, when, where, how and why as outlined in the case) as well as evaluation, with exceptional responses recognizing Kirkpatrick's levels of evaluation in cross-cultural success (Mathis and Jackson, 2008). Further, exceptional responses will address training for cognitive, emotional and behavioral cross-cultural dimensions as well as illustrate specific examples for each in the context of transfer between the Yucatan region of Mexico and Belize. Finally, exceptional responses should take into account the training objectives for expatriate success not only in company activities but also with integration into the broader community and nation of Belize.
- Task #5: Teams will respond with a creative range of support ideas for expatriate employees of Cortesia Coches. Responses should clearly identify the potential problem as well as the reason the support structure can mitigate the problem. Exceptional responses will include reference to outside resources for expatriate support, particularly within the country of Belize. Finally, exceptional responses will anticipate a return of the expatriate to the parent company home and identify the need for repatriation services as an important provision.
- Proposal Presentations: As the case assigns to the team the role of consultancy practice with the expectation that the practice develop a presentation responding to the last five tasks, teams are encouraged to think creatively in making their pitch. However, professionalism is also expected and instructors are encouraged to set out specifications for presentations as consistent with their expectations for the class.

### **Final Debriefing**

Although there has been outlined for each task a number of items that may be included in answering each task within the presentations, it should be noted that there is no one correct answer. As is the case with consultancy proposals, wide variation may be demonstrated between the presentations. One substantive benefit of the proposal presentations is that teams, and their respective members, learn from the work of their peers. What is important is that teams employ critical thinking skills in constructing their presentations such that all choices are well reasoned. Exceptional presentations will stand out through movement beyond human resource foundational knowledge toward incorporating the results of additional research related to context including cross national and cross cultural differences between the Mexican Yucatan and Belize. Moreover, some teams may recognize a third cultural consideration by including the most significant market group for the company, travelers who are citizens of the USA.

### **Evaluation**

To support evaluation with respect to the five tasks and presentation, an evaluation rubric for the case has been developed as indicated in the appendix. The rubric allows for a standard basis of evaluation on each task and overall presentation. Additionally, the rubric provides

opportunities to acknowledge investigative research related to the task beyond the foundational human resource management content. Additional points are awarded for inclusion of cross-cultural material and for culture/nation specific material.

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**APPENDIX - CORTESIA COCHES EVALUATION RUBRIC**

	Developing Up to 5 points	Accomplished +1 point	Exemplary +1 point	Total Up to 7 points
Task #1	Demonstrates a foundational understanding of ad design & incorporates TDRs and KSAs for site managers	Augments with intercultural KSAs of a general nature for cross-cultural/country business	Enhances KSAs with country specific intercultural KSAs germane to the case countries	
Task #2	Constructs a selection process with criteria and predictors	Incorporates cross-cultural/national criteria and predictors building on ad	Identifies relevant cross-culture/country selection variables beyond KSAs	
Task #3	Designs a compensation package consistent with parent country norms	Interprets cross-national conversion rates and includes compensation for transition needs	Examines cross-national benefit differences, living needs and adjusts to keep employee whole	
Task #4	Establishes a cross-cultural training program outlining required components including an evaluation plan	Recognizes short-term and long-term cross-cultural learning objectives and structures accordingly for learner centered objectives	Builds a comprehensive training package recognizing expatriate learning needs beyond work related TDRs	
Task #5	Identifies needs and possible sources of support for expatriates and families	Anticipates long term expatriate and family needs	Provides an actual resource reference list appropriate to the countries involved	
Presentation	Professional presentation inclusive of all tasks	Polished and rehearsed presentation with a thematic style	Something unexpected that wows, sizzles or excites!	
Team Talent	Includes all team members	All team members represented in building case response and in actual proposal presentation	All team members demonstrate a command of the case, consultancy proposal and presentation (seamless)	
				+ 1 rounding point
			TOTAL =	

(50 Point Potential)