

HF720: Localization and the Global Market

Assignment Four: Training

**Harassment Policy Education for U.S.-based
Corporations with Offices in Canada and Mexico**

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Introduction

AlphaBeta Inc.*, an organization based in the United States, has created a new harassment policy. The need for a harassment policy was identified after this fast growing company faced several lawsuits in 1999, many of which resulted in moderate to severe financial reparations as well as damage to AlphaBeta's reputation.

The harassment policy has already been written and thoroughly reviewed by corporate attorneys to ensure that it meets all legal requirements in the United States. The company is now in the process of establishing a training program to educate employees and managers on its content. Senior management expects that transmission of the harassment policy to AlphaBeta offices in Canada and Mexico will require translation of the document itself and any course materials, plus travel expenses for the course instructor. Because the harassment policy is such an important issue, senior management requires that this training program be a face-to-face, instructor-led classroom experience rather than a Web-based one; they believe this will ensure the full participation and attention of all employees.

** AlphaBeta, Inc. is a fictional corporation, created by the author for the purposes of this assignment.*

Learning Objectives

According to the Seven Points for Action described in the [FindLaw Summaries of Law by Legal Professionals Page](#), employers have the obligation to not only distribute their harassment policy to everyone, but also to communicate its content *effectively* to employees and supervisors. For AlphaBeta, Inc., effective communication of the harassment policy can be summarized in the following learning objectives for the training course:

- Each employee will understand the reasons for the company's adoption of the new harassment policy and understand why it is important.
- Each employee will understand how AlphaBeta, Inc. defines "harassment", and how to evaluate behaviors that *might* be considered harassment.
- Each employee will understand what to do if they feel that someone they work with has violated the policy. Managers in the organization will understand any special responsibilities they have with regard to the policy.
- Each employee will understand the consequences of not adhering to the policy.

Subsequent sections of this paper outline a training strategy that will allow AlphaBeta to educate its domestic, Canadian, and Mexican offices about the new harassment policy.

Cultural Model

Since both organizational support for the training course and the development of the harassment policy's content originated in the United States, it is important to identify any variables that may have influenced these activities. Then, an attempt can be made to define any areas of conflict with regard to the Canadian and Mexican cultures.

Individualism vs. Collectivism

People in the United States manifest individualism in a number of ways, including personal independence and individual expression (Samovar, et al., 62). We are given almost endless opportunity to do and say whatever we want, whenever we want. However, there are times when this behavior negatively impacts another "individual" who also values the personal freedoms our culture provides them (e.g. "harassment"). It is in these situations when either a person's courtesy for a fellow individual -- or the law -- steps in to prevent or resolve conflict. AlphaBeta, Inc.'s harassment policy exists because the United States government itself has a policy about this topic, and because a business that violates this federal rule is subject to serious consequences.

The above paragraph illustrates two important points. First, individualism is a concept that has deep roots in the culture of the United States. In Hofstede's rankings, the United States was given the highest score for promoting individualism (Samovar, et al., 67). Although the U.S. shares a continent with Canada and Mexico, one cannot assume that they place the same value on this variable because they have had different experiences with regard to politics, family, and business. Second, if a culture valued collectivism rather than individualism, it is possible that conflict caused by individualistic expression would not be as frequent. Additionally, the level of courtesy for other people's comfort might reduce the need for the government to resolve any conflicts that do occur, because they would be quickly resolved within the group. This idea is supported by the [Cultural Dimensions Page](#), which states:

"Large families, close working relationships, and confined spaces with other people require regard for others and harmony, and conflict is minimized. People who deviate from the norm are considered having bad or weak character. Collectivist cultures regulate behavior through shame or loss of 'face'."

With this in mind, it seems unlikely that the government of a collectivist nation like Mexico would have laws for reducing or eliminating behaviors that would be considered "harassment". Rather than fearing serious consequences from the law, members of this culture would recognize and fear the emotional and social consequences. Employees deal with these issues without mandate from their political institutions but from their social structure, which like the U.S. government, serves as an authority figure (see *Power Distance/Equality*).

As surface-level proof of this concept, searches for harassment policies in Mexico did not produce any results, often when the same search on Canada produced information similar to that found in the United States. As we will see in many situations, the attitudes of Canadian people (for example, their individualism ranking of 4) are very similar to our domestic attitudes (Samovar, et al., 67). Alternatively, Mexico's ranking of 29 on Hofstede's chart (indicating that they are at the collectivist end of the scale) illustrates that their value system is indeed very different. In

Mexican culture, groups have more importance over individuals in all areas of life, presumably including our workplace at AlphaBeta, Inc.

Power Distance/Equality

Although AlphaBeta, Inc. is delivering the harassment policy to its employees, its content is essentially handed down from an even higher power -- the United States Federal Government. As previously stated, all citizens of the United States place great value on the principles that helped establish this country, so we accept this direction without much question or resistance. Through a democratic system, U.S. citizens help define the government's power, and so this power distance is acceptable in our culture. In contrast to this accepted authority, there is also a belief in the United States that despite the position one holds in his or her professional or familial roles, everyone is an individual and all individuals are equal. Again, this cultural variable has implications for AlphaBeta, Inc.'s harassment policy. All employees of the company, whether they are the President or the janitor, must adhere to the rules; there is no flexibility in its interpretation. A higher-ranking professional or friend is not given the latitude to break policies that others must follow, since essentially all workers are equal. As evidenced by these ideas and its ranking of 26 in Hofstede's chart, the United States displays an interesting balance of both high and low power distance ([Samovar, et al., 72](#)).

Canada's Charter of Rights and Freedoms -- established by their Department of Justice -- contains most of the same ideas valued in the United States with regard to individuality and harassment ([Canadian Charter of Rights and Freedoms Page, Lawguru.com Page](#)). There is also evidence of provincial laws on this subject, such as the New Brunswick Human Rights Act ([New Brunswick Human Rights Act Page](#)). It is probably safe to assume that citizens of Canada also accept these government-established principles and rules, despite the high level of power distance. Additionally, Canada's similar power distance ranking of 27 ([Samovar, et al., 72](#)), coupled with their beliefs in individuality, seem to indicate that such rules are also equally applicable to everyone as they are in the U.S.

In Mexico, however, such laws cannot be located. It is expected that employees in Mexico will have difficulty understanding why such a policy must exist (as restriction of undesirable behavior is simply common courtesy driven by collectivism). Because the collectivist nature of this culture can have a profound affect on business relations, it is also the case that colleagues who are friends or family may receive better treatment. Laws and rights in this culture can and often do differ by group affiliation ([Cultural Dimensions Page](#)). It will therefore be difficult for employees of AlphaBeta, Inc.'s Mexico office to understand that this policy applies equally to all, despite their relationships. If used effectively, however, Mexico's extreme tolerance for unequal power distribution (at a ranking of 2) can be of great help in persuading people in this culture to adopt the harassment policy if they respect the power and authority of AlphaBeta, Inc. ([Samovar, et al., 72](#)).

Uncertainty Avoidance

AlphaBeta Inc.'s harassment policy can also be associated with the idea of uncertainty avoidance, in that it is a formalized set of rules that attempt to guide employee behavior and prevent an undesired outcome (Samovar, et al., 69). It is interesting that in United States culture, which is categorized as having low uncertainty avoidance, that one would find a policy so widely known. As the other cultural variables have shown us, however, there are other reasons for the existence of harassment policies. And while we value freedom, it is still safe to assume that no one in the United States would enjoy utter chaos.

As we have seen with all the cultural variables discussed thus far, Canada also does not generally feel uncomfortable in the face of uncertainty. It would be interesting to investigate, however, whether the other cultural variables in the Canadian culture (individualism, power distance) influence this variable as they do in the United States. Mexico has a much greater fear of uncertainty, as evidenced by their ranking of 12 on Hofstede's scale (Samovar, et al, 70). While many of the previous variables have provided important reasons why AlphaBeta Inc.'s office in Mexico might have difficulty with the harassment policy, it is possible that the knowledge of their culture's uncertainty avoidance could be of some assistance to the course developers and instructors attempting to explain it.

High vs. Low Contexting/Category Width

In any communication that crosses cultural boundaries, it is also important to consider the level of contexting necessary for the message to be accurately received and understood. In the United States we have a low context preference, meaning that details need to be explicitly stated because we do not have a pool of shared knowledge to draw upon (Samovar, et al., 79). It is interesting to note that this has a direct correlation with our individualistic nature. However, most people are familiar with harassment policies and therefore should not require as much detail as they would for a subject that was relatively new.

Although specific information about the contexting of Canadians cannot be located, it would be a safe to assume that they are similar to the United States (and France) in their preference. Once again, however, Mexican culture differs greatly. Because of their collectivist culture and close relationships, "people are very homogeneous with regard to experiences, information networks, and the like" (Samovar, et al., 79). Therefore, they will not always require the same level of background information and detail to understand a particular message, and might even be frustrated by its inclusion. Since the subject of a formalized harassment policy may require a modification in their thinking and is a new subject, however, it appears that more detail might actually be appropriate in this case.

Learning Orientation

As in our classroom experience, it is often the case that course materials are projected on an overhead for students to follow the written explanation of a subject. Students in the United States are familiar with this form of communication and may even come to expect it. As Thatcher found during his study of businesses in South

America, however, oral communication such as personal dialogue and classroom discussion seemed more effective than written forms of communication for a collectivist, high-context, and high power distance culture such as Mexico (180).

Additionally, Thatcher's investigation uncovered that South Americans frequently use dramatization, narrative, examples and scenarios to arrive at concrete application of concepts. They are likely to have lengthy discussions that may appear redundant and "off-the-topic" to instructors in the United States and Canada. However, building consensus about a topic through these discussions allows those in the Mexican culture to establish or maintain in-group relationships (Thatcher, 185).

One last point about differences in learning orientation: while the tendency in the United States is to generalize information (and thus maintain equality), South Americans preferred to understand how an idea pertained particularly to them. The idea of equality central to the U.S.-based harassment policy, however, is likely to cause problems when Mexican employees are told that despite their group affiliation, the policy applies without particularism.

Global Core

Since Canada and the United States are nearly identical in all of the variables previously discussed, the easiest way to present the harassment policy is to provide a global core for use in these two countries, and then localize for Mexico. The following points illustrate how the four learning objectives should be addressed in the global core:

- Both Canada and the United States understand that laws regarding individual behavior originate from the government and must be adhered to. Human rights and equal, harassment-free treatment for all people are well established, widely known concepts; therefore the employees do not require extensive background information into why the policy exists at AlphaBeta, Inc. or why it is important (the first learning objective). Rather, the importance of the policy might be best explained in relation to its consequences.
- To meet the second objective, employees in Canada and United States need to be clear on the definition of harassment so they can analyze situations and determine whether the policy is being violated. A written definition should be provided both for the classroom experience and for future reference purposes (most likely, a handed out copy of the policy itself). Any questions about the wording in the definition can be discussed using the Socratic method, which allows the employees to actively participate in their education. Brief moments of group discussion during the training course could provide an effective way for the instructor to clear up "gray" areas.
- In cases where *individuals* cannot decide on the nature of the behavior or in cases where they have identified a violation, employees must be convinced to speak with others in their organization (managers and/or other designated employees). Fulfillment of the third objective might be accomplished with a written

information sheet about whom to contact. The challenge here, however, will be to provide the encouragement necessary for these employees to communicate with others about these matters. Emphasis on personal privacy and confidentiality will most likely be useful.

- To meet the fourth objective for Canadian and U.S. audiences, consequences of breaking the policy will focus on monetary loss for AlphaBeta, Inc., but in particular how this loss affects the compensation for all employees. It should also focus on the legal ramifications for the individuals involved.
- In Canada, the English and French languages are given equal status. Therefore, translation of the policy and/or course materials is not absolutely necessary, and English can be utilized within the global core ([Canadian Charter of Rights and Freedoms Page](#)). The money saved on translation costs can be better utilized for Mexican localization.

Localization Issues

As senior management might be unhappy to learn, translation of course materials developed in the United States will not be enough for AlphaBeta, Inc.'s Mexico office. Because their cultural values and learning orientations are quite different from others on the continent, the very methods used to explain the harassment policy will require significant alteration ([Thatcher, 183](#)). The following points illustrate how the four learning objectives should be addressed with regard to localization for Mexico, as well as other localization points for Canada:

- To fulfill the first learning objective for AlphaBeta, Inc.'s Mexican employees, the course instructor should emphasize that the contents of the harassment policy are simply a documented form of commonly held cultural beliefs with regard to courtesy. Adoption of the policy should not require a change in behavior, since Mexicans are group-oriented by nature. The reason for the document and training might even be attributed to legal formalities in the United States, or as within AlphaBeta's realm of authority over its employees.
- In Mexico, the definition of harassment and evaluation of behavior is another difficult task. Much more time may be needed to explain to employees what does and does not fall within the boundaries implied by the definition. Scenarios might be acted out for the class, and employees should be given the opportunity to discuss these examples with each other for a longer period of time than the U.S. and Canadian groups. It is especially important that everyone understands how this policy is equally applicable to employees *and* their managers, to friends and family. Exceptions are not made based on status or group affiliation. The course instructor should be careful not to particularize the cases for one employee or person in the group, as this may implicitly negate the previous point. Moreover, the second and third learning objectives might be combined for this audience, since employees in Mexico are likely to want to discuss the subject. The level of awareness that a violation has occurred will be the area requiring the most attention and encouragement.

- The consequences of breaking the harassment policy should be explained primarily in terms of social consequences for the deviant's group and damage to the reputation of the company as a whole. Impact to the bottom line of the company, and therefore to the employees, can be mentioned but not necessarily with the emphasis it is given for U.S. and Canadian audiences.
- Any materials used for the course, as well as the harassment policy itself, should be translated into Spanish. The number of written course materials may actually decrease, since the employees are likely to spend more time in discussion than in following along with a written guidebook.
- Lastly, any explanation of the financial cost to AlphaBeta, Inc. because of policy violations must be given in either U.S. dollars, Canadian dollars, or Mexican pesos.

Conclusion

In sum, AlphaBeta, Inc.'s harassment policy is well suited to delivery in their domestic and Canadian offices, but presents interesting areas of conflict for transmission in Mexico. The similarities between the United States and Canada in areas of government, family, business, and learning styles facilitate the creation of a global core that is acceptable to the creators of the policy and the employees. The standard teaching or business meeting methods will generally be effective in ensuring that the audience understands the policy. However, the extreme differences between the United States and Mexico present difficult challenges. Course developers and instructors must take content that is characterized by the deep cultural values of the United States into a culture that often holds opposing views. If the instructor is from the U.S., he or she must also expect to adopt a different (and quite possibly uncomfortable) teaching style to ensure that employees in Mexico thoroughly understand this harassment policy, which contains foreign concepts and rules. There is no doubt that in this case, localization involves much more than translation of text. And, AlphaBeta, Inc. must be prepared to make that investment if their new harassment policy is to be a success in all of North America.

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