

Understanding the Demands of Leading in a Global Environment: A First Step

Meena S. Wilson and Maxine A. Dalton

Organizations today must operate in an increasingly international context, crossing political, geographical, and cultural boundaries. This has raised the questions of whether new leadership skills and behaviors will be required to meet the demands of this emerging global environment, and how, if new abilities are indeed required, leaders can be helped to develop them. Although it is difficult to answer these questions at this relatively early stage in globalization, there is a source of information that can help us begin to understand: the experience of managers who have worked outside their own countries. Therefore, we have undertaken a series of studies of expatriate and repatriate managers. The following summarizes what we learned from the first of those studies.

In order to get an idea of what makes expatriate managers effective, we held one- to two-hour interviews with sixty-seven participants from three multinational companies. (The expatriate interviews were conducted by telephone, and the repatriate interviews were conducted in person.) We also administered personality and personal-assessment instruments to some of these. Here is what we have learned thus far about effectiveness and how this is influenced by organizations.

Factors of Effectiveness for Expatriate Managers

We found that expatriate effectiveness involves a complex interplay among several factors: personality, personal history, life circumstances, language and cultural training for managers and their families, and career history and experiences.

Personality

We used the NEO PI-R (Costa & McCrae, 1992), a five-factor measure of personality, to collect data from a segment

of our sample (eleven expatriates, mostly from the U.S.). These factors—neuroticism, extroversion, openness, agreeableness, and conscientiousness—may be viewed as comprehensive because they were identified by meta-analytically integrating concepts underlying many other personality measures. We also selected this instrument because it has already been used to study the relationship between personality and effectiveness for domestic managers (Barrick & Mount, 1991).

Based on traits for which the scores for these managers are much higher or lower than average, here is a snapshot of an effective expatriate manager: He or she is extroverted—assertive, socially ascendant, energetic, and busy with a fast-paced life; conscientious—orderly, dutiful about fulfilling obligations, disciplined, hard-working and achievement-oriented; and more likely than most to hide true feelings and willingly manipulate others. (It is worth noting here that this profile of an effective expatriate manager is not dissimilar to that of an effective domestic manager. Also, we should mention that we are at present gathering NEO data on a larger sample of non-U.S. expatriates to see if our preliminary findings hold.)

If personality were the only factor contributing to effectiveness, selecting for managerial success would be easy. But although a personality like the one described above is important, managers must also learn to curb some of its tendencies. The high-achieving, somewhat dominating, and highly work-oriented individual must also demonstrate patience or the ability to say (even if only to himself or herself) “I do not know,” and must strive to work collaboratively with others.

“To be effective, one must be patient, take time to observe and listen, and not make up one’s mind too fast.”

“You have to give things time and talk about them. You have to step out of it and let others go ahead and do what needs to be done.”

“At first I was too aggressive in trying to get things done. So they ignored me. I was left out of meetings. I was too aggressive and action-oriented.”

Personal History

We asked interviewees how their personal life experiences may have contributed to their effectiveness. Based on their reports of significant experiences as children and young adults, it appears that they learned the *lessons of difference* and *lessons of accommodation*.

Unfortunately, at present, expatriate assignments are not viewed as part of an overall strategic game plan for business management and growth. The hard-won expertise, contacts, and wisdom of expatriates are usually ignored rather than utilized to make the organization more globally astute.

Although *The Wall Street Journal* has reported that “an overseas stint can be a ticket to the top” (January 29, 1996), expatriate assignments mostly remove individuals from the mainstream of corporate life. In their study of global assignments, Black, Gregersen, and Mendenhall (1992; pp. 4, 235, 237) report that 60% to 70% of U.S. repatriates have no specific job to which they return, 46% wind up in jobs with less authority, 77% are actually demoted, only 39% have the chance to utilize their newly acquired international skills, and 20% leave the company within a year of their return.

Without the construction of career paths for repatriates to continue within their company upon return, the pool of candidates for future international assignments will shrink, and a resource for the development of leaders able to be effective in a global environment will be compromised.

that you share some of your winnings with us.”

Ace persisted, “I didn’t have anything to do with what your stakes were. I don’t make the rules here.”

Taxing Rockefeller

We were running out of class time so I leaned on them for a quick decision. They jointly decided to commandeer some of Ace’s M&Ms, “taxing Rockefeller” as they put it, and with some of his stake redistributed, played a few more hands.

I stopped them with five minutes of class time remaining, and said, “Let’s talk about it.”

The discussion was animated, with lots of familiar phrases:

“The world isn’t fair.”

“I didn’t make the world.”

“People who have a head start should have to help those less fortunate.”

“Two wrongs don’t make a right, and besides, if you subsidize people, it will make them weak.”

“After I have worked hard for something, why should I have to give it to someone else?”

“It is grossly unfair to have to enter the game several laps behind the leaders. How can you ever catch up?”

At one point I turned to Sue and asked, “How did it feel to you, not knowing how to play poker?”

She is a poised, attractive, well-spoken young woman with strong feelings about women’s issues. Her eyes flashed as she talked, her words gushing out like the release of a pent-up torrent. “Sir, this game is exactly how it is to be a woman at the academy. You show up here and you are expected to be able to do everything that boys do, whether it is useful or not. I don’t play poker, I’ve never played poker, I don’t care about poker. And there’s no way that poker is necessary to be a good Air Force officer. Yet because I don’t play poker, I am made to feel silly and insignificant. And worse, as someone who has to have a consultant who can’t even handle his own money assigned to her to get her through the day. Sir, it is really degrading and disgusting.”

She went on for three or four minutes with one of the most persuasive and appealing extemporaneous statements describing the plight of young women in macho settings that I have ever heard. The class became silent, and I am convinced that no one who heard her eloquence could ever quite look at the academy’s EEOC issues in the same way in the future.

Coincidentally, I conducted this class on the Friday before Parent’s Weekend, a day that the academy encourages parents to show up and attend their cadet’s classes. As a result, two sets of parents

were in the classroom during the poker game. One set was white, from Staples, Minnesota, named Anderson; the other was black, from Denver, named Butler.

When I walked into the classroom and saw them there, I thought, “Whoops, what if this experiment goes awry in some way: Will I have some offended parents on my hands?” But it was too late to develop another lesson.

A few days later, during the next class meeting, I asked Anderson, “What did your parents think?” He smiled a pleasant Scandinavian smile and replied, “Sir, they were real interested and impressed. They were surprised that teaching like that would go on at the academy.”

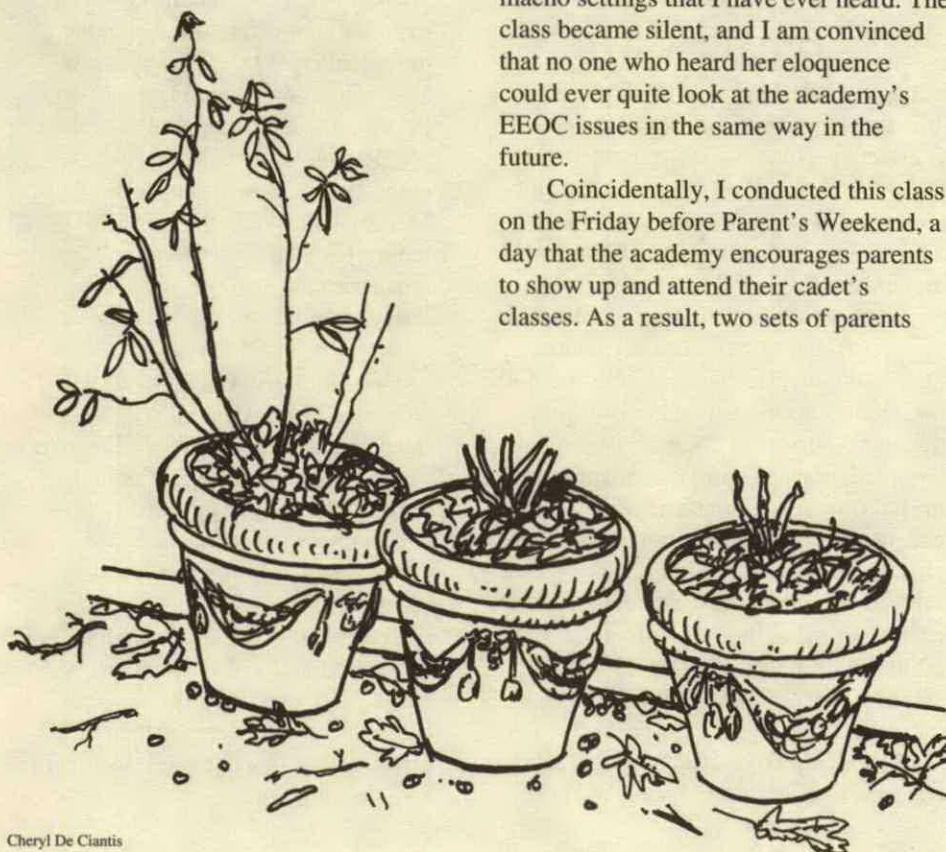
“Rhett,” I asked, “what did your parents think?” (Rhett is black, about six-foot-four-inches tall and two-hundred-and-twenty pounds, with an easy, attractive smile.)

“Dr. Campbell,” he grinned, “my parents told me, ‘Rhett, you pay close attention to what he is teaching you because that’s the way the world really works out there.’”

Working through these weird, intense dynamics of the sixties with these youthful, much more placid children of the eighties once again reminded me that the Chinese had it right with their curse, “May you live in interesting times.”

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*David P. Campbell is Smith Richardson Senior Fellow in Creative Leadership at CCL in Colorado Springs.*



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how a manager can learn from others and teach others as well. They helped managers to consciously develop the ability to be skillful learners—to adopt multiple tactics such as observation, listening, inquiry, and reading.

### Learning from the Expatriate Experience

We analyzed what expatriates told us about the lessons they learned—about how they changed on the path to becoming successful.

Managers come to appreciate how relationships evolve as a result of patience, willingness to listen and learn, and commitment and investment in people. They learn how valuable a participatory style of leadership can be in ambiguous situations—this is because major decisions have to be made, which are then carried out by locals whose motivations and values can be difficult to understand. They learn how critically important relationships are to business effectiveness. As one executive commented:

"I learned a whole other perspective and way of doing things. I learned to listen, to reevaluate the value of a collaborative style. You have to establish the relationship and see if the trust is there. But it is hard. It is hard to trust people who are so different. This is really true on joint ventures. If you don't have the basic alignment around basic values, then it won't work. You have to see if the trust is there."

Because they learn to respect multiple points of view, these managers develop perspective on themselves, their organizations, and their culture of origin. Their perspective lets them leverage cultural differences for business advantage—local norms or corporate norms are used as needed to accomplish goals.

"I learned breadth. I learned about my own country. It was painful to look back and see our society and what our society is all about. When I looked back I saw violence. I saw greed. I saw a lack of appreciation for the day-to-day details of our lives."

In the final analysis, expatriates learn to become boundary-spanners who move easily between the field operation and the corporate office and can balance the

interests of multiple stakeholders. They learn how to work across constituencies to mobilize the organization's work agenda.

"My approach is different now. I have a global network of people working with me that I met in Europe. I know who to go to. I have credibility not only in Los Angeles but in Japan, Asia, and Canada."

### The Important Role of Repatriate Managers

As one executive in our study observed, "Repatriation is orders of magnitude harder than expatriation. When you go out, the adrenaline is pumping; when you come back, nothing. Coming back was the worst experience ever." Another said: "We need to treat people right when they get back. The organization is not good at making a place for you to come back into."

What organizations must come to recognize is that these managers are a valuable resource. They have faced a tremendous developmental challenge, and they have done it in an international context.

At the least, repatriates could become advisors for selecting and training younger managers in their own company for international experience. By capturing their expertise on running the business in particular regions of the world on videotape, for example, the organization could capitalize on their experiences without placing unrealistic demands on their time.

At the most, repatriates could serve as internal consultants—helping with strategic decisions with regard to the global business, transferring knowledge from one region of the world to another, and recruiting younger managers into a talent pool. An expanded communication network between repatriates worldwide could be a bank of business and social knowledge about globalization, thus positioning the organization for competitive advantage.

### Conclusion

For companies to succeed in an evolving global environment, they will need effective leaders. In order to develop such leaders, we believe that the following things must happen: As many managers as possible should be given expatriate

assignments; the managers given these assignments should be helped by their organization to approach them as "learningful" events; and the organizations need to use repatriated managers as a learning resource.

Our findings, and our recommendations, are of course preliminary. We will continue our research to help us better define "global leadership" and better understand the implications of this definition for individual and organizational practice. In this way, we can learn how to select people with the potential to be effective internationally, and discover how their development can be accelerated.

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Meena Wilson is a Center associate in the Global Resources Group at CCL in Greensboro.

Maxine Dalton is a research scientist and leader of the global leadership research cluster at CCL in Greensboro.

Issues&Observations



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For example, several interviewees pointed to an exposure to diversity in their early life—an immigrant parent, a foreign-born spouse, an international schooling experience, or childhood in a border town or ethnically diverse community. These individuals seemed to have learned early the lessons of difference—that there is more than one way to living one's life.

Others reported relocating from one part of the country to another and their observations of how the adults in their lives handled such disruption. Self-reliance seems to have combined with reliance on others. On one hand, moving to a totally different kind of life gave them independence and confidence; on the other hand, they began to value relationships—getting along with others and learning from them. These individuals seemed to have learned the lessons of accommodation—that there are skills that can help individuals adapt to new situations when they have to leave home.

Life Circumstances

"Catch people when it is possible for them to go," commented one interviewee. For the most part, organizations do not take extenuating personal situations into account when making expatriate assignments. The company is not likely to consider factors that can substantially influence effectiveness—such as, for example, whether offspring of high-school age will be able to adapt to life in another country or whether a manager has care-giving responsibilities to elderly parents.

Another critical, but often disregarded, factor is spousal interest in and support for relocating to another country. The level of spousal satisfaction is somewhat of a barometer for predicting expatriate effectiveness—research has irrefutably demonstrated the link between family issues and premature termination or reduced effectiveness on assignments (Stroh, Dennis, & Cramer, 1994; Tung, 1988). Yet spousal readiness for the expatriate experience is usually not assessed.

A majority of interviewees unambiguously stated their views about the spousal role:

"I can't tell you how important the feelings of the wife are. . . . The man gets very excited. He is moving to a demanding and compelling position where his capabilities are going to be recognized. He will have instant community. Meanwhile, the woman is leaving behind everything that has value for her and will have less access to her husband's time at a point where she needs it more. She leaves her environment; he takes his with him."

"We should not underestimate that my spouse gave me 100% support. That was essential to my being effective."

"This kind of an experience is a real partnership and you shouldn't take the assignment if the marriage isn't strong. It will make it better or blow it apart."

The social responsibilities of wives, particularly in Latin American and Asian countries, is seen by expatriates as contributing directly to their effectiveness. Often the spouse is regarded by the government and community as representing the company to just as great an extent as the executive. Yet, to the chagrin of most managers, this spousal contribution to the company's agenda in the host country is usually not acknowledged.

Language Training

Should managers be expected to learn the language of their host country? "Locals hate it when you can't speak the language after one year," said one. "When U.S. expatriates are not effective, it is because they are too lazy to learn the language," commented another.

Willingness to learn the language seems to symbolize respect for the host culture. Even if the expatriate is not able to conduct business in the language, the use of greetings and a few phrases signifies that he or she is making an effort. The effort is valued and the manager's credibility increases.

Cultural Training

Of the various factors influencing expatriate success, the one most easy to manipulate is providing cultural training. Yet companies often fail to prepare expatriates and their families for their sojourn abroad. Basic orientation to the history, religion, culture, politics, food, family structure, and values of another

country is often neglected. Expatriate managers can arrive in the host country with little prior knowledge of how the country culture will affect their conduct of business. Nor are expatriate managers from other countries who are employed by a U.S. multinational and assigned to the U.S. familiarized with business and social customs here.

Similarly, support for transitioning the family in and out of assignments is seldom available; cultural and language training for the family is reportedly idiosyncratic and inconsistent.

Career History

We discovered three common themes governing the careers of effective expatriate managers: superior business knowledge; familiarity with policies and procedures at company headquarters; and the presence of role models, mentors, and sponsors.

What was most significant about the work history of our interviewees was their exposure to assignments in many functional areas and geographical regions. The scope of their assignments often included high levels of accountability, autonomy, and visibility. Their careers featured a variety of job challenges such as start-ups, fix-its, and turn-arounds. In a word, their business experience was broad. Their work lives were replete with opportunities to learn and practice a wide variety of management skills.

These managers' careers also included a stint at headquarters where they learned "how corporate thinks." Here they established contacts, networks, and an understanding of organizational structures and politics. This was the beginning of their preparation for the boundary-spanning role of the expatriate, enabling them to later interpret U.S. corporate culture to the local country office and the local office to U.S. headquarters.

The role models, mentors, and sponsors who seemed to have had the greatest impact on our interviewees were those with an international perspective. Their major contribution to the development of these executives was to show them how *not* to be hierarchically oriented when working with people. They modeled

Ten Powerful Trends Shaping Your Future



The year ahead promises to be a watershed year in the way Americans—and people around the globe—live, work, and make money.

THE YEAR 1986 IS shaping up to be a time of important changes. The ten trends discussed here will affect all of us. Many of these changes are dramatic and pervasive—such as the social transformations created by the introduction of lasers and computers in our workplaces and homes, the surging role of innovators in the business world, and the skyrocketing importance of women as an economic force.

Other changes that we anticipate are subtle: the slow, but inexorable, global shift toward the political center, and the global movement toward private operation of traditionally public institutions, such as schools, prisons, and transit systems.

To prosper during this period of enormous changes, it's essential that we understand not only what is happening but why. New directions in social behavior don't occur in a vacuum. These trends won't suddenly erupt in 1986. In some cases, they began to emerge during the early part of this decade; in others, they became evident more recently.

1. Waterbelt States Make Economic Waves. The Lakes Will Rise Again.

Michigan may well go down in history as the comeback state. In fact, in the year ahead, all six Great Lakes states—Illinois, Indiana, Michigan, Minnesota, Ohio, and Wisconsin—will experience an economic renaissance that will startle traditional economists.

What magic formula will set the "Rustbelt's" economic wheels in motion once again? No magic, but there is a formula. One part water—frequently referred to as the oil of the eighties—one part commitment to economic diversity, and one part determination to act in consort, speaking with one regional voice, to reverse years of decline.

2. U.S.A.-Japan Inc. Hits Its Stride. Explosion of the New Binational Corporation.

The year 1986 will mark the beginning of the end of consumer products developed exclusively for domestic markets. U.S.A.-Japan Inc. will be in vanguard of global corporations researching and developing consumer products for international markets. However, even as multinational ties are strengthened, there remain some troubling trade issues yet to be resolved, particularly between the United States and Japan, which are in the process of creating the first binational corporation, U.S.A.-Japan Inc.

A trade imbalance and cultural barriers notwithstanding, in the year ahead, talk of protectionist measures and retaliatory posturing may well prove to be much ado about nothing as joint ventures and new business opportunities on both continents move us steadily toward U.S.A.-Japan Inc. From computers to cars, consumer goods to financial services, activity is strong and getting stronger on both sides of the ocean.

3. The Health Industry Goes Into Post-Surgery. Take Two Aspirins and Call Your Surgicenter in the Morning.

Across the nation, health officials estimate that up to 1,000 hospitals will close their doors by the end of the decade. And, for the first time in two decades, the number of hospital beds in the United States declined in 1984.

Meanwhile, walk-in emergenciers and surgicenters—out-patient facilities, conveniently located in business districts, shopping centers, and along suburban roadways—have increased from 260 in 1981 to 2,500 currently.

America's health-care delivery system is in a tumultuous period of transition. In the past twenty years, ever-escalating costs have forced health-care givers, consumers, and those responsible for America's health-care bills—insurers, the government, and business—to ask themselves uncomfortable questions, not the least of these being: Is health care a basic human right or simply another service provided to those who can pay? If

it's a right, who pays for that care when the recipient cannot?

In the year ahead, those questions will assume greater urgency as extraordinary competition moves the health-care system in dual directions: Medical Care Inc., owned and operated by large centralized health-care corporations, and at-home self-care.

4. It's a Working Woman's World in a New Seller's Market. The Advantage Shifts.

Women have developed the Midas touch. While everything they touch may not turn to gold exactly, every work arena they enter undergoes a dramatic transformation. Since the early 1970s, women have been flooding into the work force. Not content to remain forever in female-dominated job "ghettos," women have donned hard hats and helmets, lab coats and judges' robes, and have picked up scalpels and sledgehammers.

Women are earning greater respect as an economic force to be reckoned with. Consequently, an ever-increasing range of service industries have turned into growth industries as the marketplace scrambles to meet the needs of working women. Day-care centers and training schools for nannies are springing up around the country. Maid services are more widely available. Realtors and builders are keenly aware of the growing female market for homes and condominiums. Carmakers and distributors now view thirty-four-year-old single professional women as a major market.

In the year ahead, women and men will realize what advertisers and public relations people have known for some time—women are reshaping the marketplace. Also in 1986, labor shortages will create a seller's market for jobs. Women will be courted by corporations whose doors, until now, have been closed to them. In the coming seller's market, it will be a women's world.

5. Smart Buildings, Smart Rooms Change the Way We Live and Work. It's What's Inside that Counts.

Industry observers anticipate a full-scale marriage of high-tech and down-home living over the next couple of decades. In 1986, many newly constructed homes will come equipped with computer-controlled heating, air conditioning, and security systems. Increasingly, consumers will blend technology with personal style in home furnishings for a high-tech high-touch balance.

As technology-based products become more user friendly, and users

TEN TRENDS

become more comfortable with the idea that technology can, and should, serve to make work and play a little easier, the demand for smart products, smart homes, and smart offices will grow. In the year ahead, expect to see growing demand for, greater availability of, and sharply reduced prices for, a dizzying array of computer-controlled systems for home and office.

If all this makes you feel as if you've been left behind in a time warp, fear not. If you have a Touch-Tone phone, you already own a computer terminal—albeit a rudimentary one. If you own a VCR and a stereo, you have the foundation of a sophisticated entertainment center.

6. Retailing Gets a Wholesale Face-Lift. Innovators Give Traditionalists the Business.

By the end of 1986, thousands of fast-food aficionados will have it their way, courtesy of a six-armed robot. Programmed to do virtually anything restaurant workers can do—except maybe put its thumb in the soup—the robot will prepare meals to order, serve them, take money and make change, sweep the floor, and clear tables.

Most business owners probably are not ready for robots, but the age of electronic retailing is nonetheless dawning and may well revolutionize the retail industry. The proliferation of home computers and the more widespread availability of videotex services will propel this infant industry to new heights.

In 1986, the retailer who is able to identify a market niche and to meet consumer expectations in that niche will fare well. Retailers who try to be all things to all people, or who miss a key component, will be washed away in a tidal wave of competition.

7. Laser Technology Transforms Industry. We're All Beginning to See the Light.

The laser evolved in twenty-five years from little more than an exotic flashlight into an indispensable tool in medicine, industry, electronics, data processing, communications, and scientific research. According to *Lasers & Applications* magazine, more than a million lasers were sold for medical and industrial use in North America, Western Europe, and Japan in 1984—twice as many as in 1983—for a total of \$416 million in sales.

When military applications are calculated, this one-time laboratory curiosity now represents a billion-dollar industry. Military laser equipment and

services will reach \$4.25 billion in sales by 1988, up from \$2.06 billion in fiscal 1983, according to one market research firm.

In the year ahead, whole new categories of jobs will be created as laser technology is put to work in a variety of industries. Communications, information, and engineering areas will require increasingly greater numbers of technicians.



It pays to keep an eye on the trends affecting your world.

8. Private Enterprise Takes a Chunk Out of Government. Discovering Profit in Schools, Transit Systems, Prisons.

Privatization—the private delivery of public services—is sweeping the nation. Egged on by the Reagan administration and encouraged by reported savings of better than 20 percent over publicly-administered programs in some communities, mayors and county officials are turning to private industry to provide a wide range of public services.

Garbage collection tasks and street maintenance were the first areas to be privatized. Now prisons, hospitals, and public transportation networks are being put in the hands of private operators. What's next? Education. For-profit tutoring, adult continuing education courses, and executive learning centers are cropping up around the country, as entrepreneurs and established corporations rush to fill a gap created by widespread public dissatisfaction with America's educational system.

In the year ahead, a steady trickle of private companies assuming once-public tasks for profit will become a downpour. Entrepreneurs and established corporations alike will eagerly bid for government contracts as both government and business realize that privatization can be a win-win

proposition for local communities.

9. Madison Avenue Remolds the Professions. Removing the Mystique from Medicine and Law.

Until recently, two commonly-held precepts remained constant in the public mind: Economists and weather forecasters were always wrong, and doctors and lawyers were always right—or if not right, at least better equipped to deal with the human condition than ordinary mortals. During the past few years, one of those precepts has been shattered. Increasingly, doctors and lawyers are being viewed as all too human.

Plummeting prestige—which both doctors and lawyers blame on the media's inclination to emphasize, and sensationalize, the darker side of professional conduct while ignoring more positive, altruistic activities—may be disconcerting. But revolutionary changes in the marketplace will prove to be a much more difficult hurdle to overcome.

The days of walking out of professional training programs and into lucrative private practices are over. In the year ahead, physicians, dentists, and lawyers will be forced to embrace marketplace survival strategies. In 1986, most independent professionals and group practitioners will advertise, specialize, and computerize to stay afloat.

10. Global Politics Move Toward Center. The Fringes Unravel.

Political rhetoric has given way to economic realities around the globe. Political hard-liners at both ends of the spectrum are softening their tone as countries strive to improve economics at home and achieve a competitive advantage in the global marketplace. In the year ahead, moderation will be the watchword as developed countries and third-world countries alike attempt to identify their role in what has come to be called the global economic village. Fiscal conservatism will reign. Although 1986 will mark the beginning of the end of the welfare state, social issues and personal life-style choices worldwide will assume a decidedly liberal bent.

Domestically and internationally, these trends add up to a period of incredible change. Those who anticipate and understand these trends will be better equipped to make the decisions of life: what to study, where to live, where to work. □

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