



DEVELOPING SUCCESSFUL GLOBAL LEADERS

The Third Annual Study of Challenges and Opportunities
2012

Conducted in Collaboration with the Institute for Corporate Productivity (i4cp) and *Training* magazine

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About This Study

This study represents one of the most comprehensive annual reviews of global leadership development programs in the world. The partnership between the American Management Association (AMA), the Institute for Corporate Productivity (i4cp) and *Training* magazine has brought together the insights and opinions of over 1,000 practitioners worldwide to contribute to these findings.

Terms

Global Leadership Development

Global leadership development is defined in this study as: *activities that help leaders develop a set of competencies that are critical to the business success of organizations competing in a global marketplace. A global leadership program/curriculum tends to focus on competencies specifically for global leaders as opposed to leaders operating in a single country and dealing with a single national market.*

Performance

While this study focuses on global leaders and their development, it also emphasizes the links between these programs and overall organizational performance.

Performance has been measured using an index referred to as the Market Performance Index (MPI). This index combines responses to questions related to four key areas of business success: revenue growth, market share, profitability, and customer focus.

Tables and graphs throughout this report show the strength of the correlations, or statistical relationship, between the participants' responses to specific topics and their companies' MPI scores.

Survey Technique

The survey participants for this study were drawn from three sources: the AMA and its global affiliates, i4cp's global survey panel, and subscribers of *Training* magazine. The number of active participants in this study was 325, a portion of the total 1,050 total respondent population who indicated that their companies had a global leadership development program in place. In some cases this number was further narrowed to 261 participants to capture organizations that both have a global leadership development program and represent companies that operate either multinationally or globally. More than 30 industry sectors were represented in the final population of participants.

Most questions in this study used 1-5 Likert-scale type questions, with a 1 rating generally designated as "not at all" and 5 rating as a "very high extent." There were 36 total questions, including demographic questions and those used to calculate the MPI.

Executive Summary

Business is increasingly global, and with this certainty is the expectation that leaders possess the skills to manage effectively in the global marketplace. The ultimate success or failure of these managers is largely driven by how well they have been developed throughout their careers and prepared for the global field of play. Capturing the current status of global leadership development programs and tracking ongoing progress with existing programs is the primary objective of the third annual *Developing Successful Global Leaders Study*.

The 2010 and 2011 studies established a foundation for understanding global leadership development programs. And while only about a third (31%) of survey respondents reported that their organizations had created such programs—virtually no increase from previous editions of this study—there was reason for optimism about the future of global leadership development programs, including findings such as:

- While the recession clearly slowed the growth of the introduction of new global leadership development programs, that trend seems to have stabilized. This suggests that as the global economic recovery gains traction, new programs will be launched.
- Change management, critical thinking, and the ability to build coalitions and informally influence others continue to be viewed as high priorities as well as key opportunities for improvement of global leadership development programs.
- While quantitative measures are increasingly being used to evaluate global leadership development programs, two trends are emerging: 1) high-performing companies are utilizing a much wider array of evaluation metrics and 2) formal performance reviews of program participants are becoming less important—particularly among low-performing companies—for evaluating the effectiveness of global leadership development programs.

Companies are increasing their dependence on outside vendors for assistance in designing and executing their programs, with a particular focus on vendors' global capacity to execute anywhere in the world.

Key Findings

Key Finding 1

Most companies continue to fail to develop global leaders, yet there appears to be a greater recognition of the link between global leadership development programs and overall business performance.

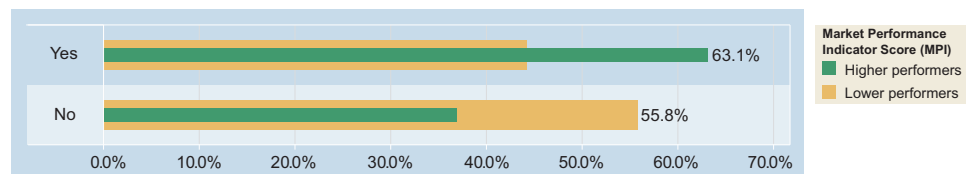
Just under a third (31%) of companies have implemented some form of formal global leadership development programs. This represents no movement whatsoever since the first edition of this study (2010), with 31% reporting having global leadership programs. This should also be contrasted with the 2011 survey in which 16.5% of companies reported that they *planned* to implement such a program in 2011, but apparently did not.

This lack of expansion of global leadership programs includes organizations that identified themselves as operating on a global scale. In 2010 62% of global companies had leadership programs in place, yet that number has remained virtually unchanged at 59% in 2012.

In 2010 and 2011 it was clear that there was a wide separation in the existence of global leadership development programs between the percent of high-performing companies (as identified using the MPI) compared to their lower-performing counterparts. In 2011 58% of high-performers reported that they had a global leadership development program in place, compared to only 34% of low-performers. Additionally, there was a statistically significant (.11) correlation between whether a company reported having a global leadership development program or not and their MPI score.

Most (63%) high-performing companies reported having a global leadership program in 2012, up 5% from 2011. Forty-four percent of low-performing companies reported having a global leadership program in place in 2012, a 10% increase over 2011. It is reasonable to conclude that companies focused on improving their performance are looking at global leadership development programs as an attractive investment, a wise move in view of the correlation between global leadership development programs and MPI performance, which continues to be a statistically significant .12.

Does your organization currently have a global leadership development program?*



*Results are filtered to reflect global companies only

Key Finding 2

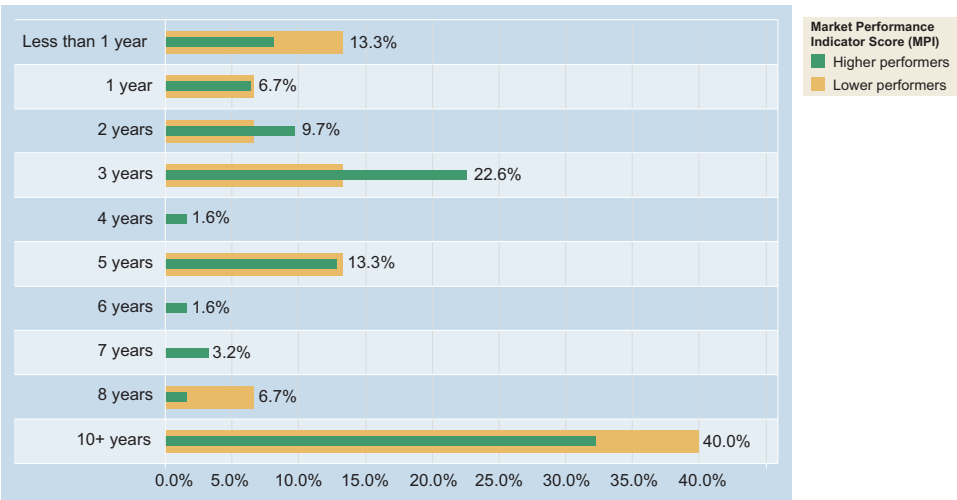
While the recession has taken a heavy toll on companies' ability to introduce new global leadership programs, there are indications of a post-recession resurgence.

As one might expect, the protracted recession has limited the capacity for many organizations to roll out new global leadership development programs. While more than half of companies that have global leadership programs reported that their programs have been in place for at least five years, the peak for introducing new programs over the past decade occurred in 2008 with 19% of companies reporting that they introduced them just as the global economy was sinking into recession. Since then, only 11% of new programs were introduced in 2009, and 8% were introduced in 2010.

However, there may be signs of recovery both in the economy in general and in the learning budgets of global companies. As of December 2011, when this survey was fielded, 8% of companies with global leadership development programs indicated that they had introduced their programs during 2011. While, of course, compared to 2010, this reflects flat movement, it demonstrates that the downward trend for introducing new global leadership development initiatives may have leveled out from the drop that began at the start of the recession.

Of particular interest is the fact that low-performing companies seem to be investing in global leadership development programs faster than their high-performing counterparts. Of those companies with global leadership programs, 13% of low-performing companies introduced them in 2011, as opposed to 8% of high-performing companies. While this may indicate that low-performing companies realized that they were late to the game, it does demonstrate that even companies that don't have robust financial performance view global leadership development programs as a prudent investment—even during a recession.

Approximately how long has your global leadership development program been in existence?*



*Results are filtered to reflect global companies only

Key Finding 3

Global leadership development programs continue to become more effective in achieving their goals. But while low-performing companies are improving, the effectiveness gap between high- and low-performing companies' programs continues.

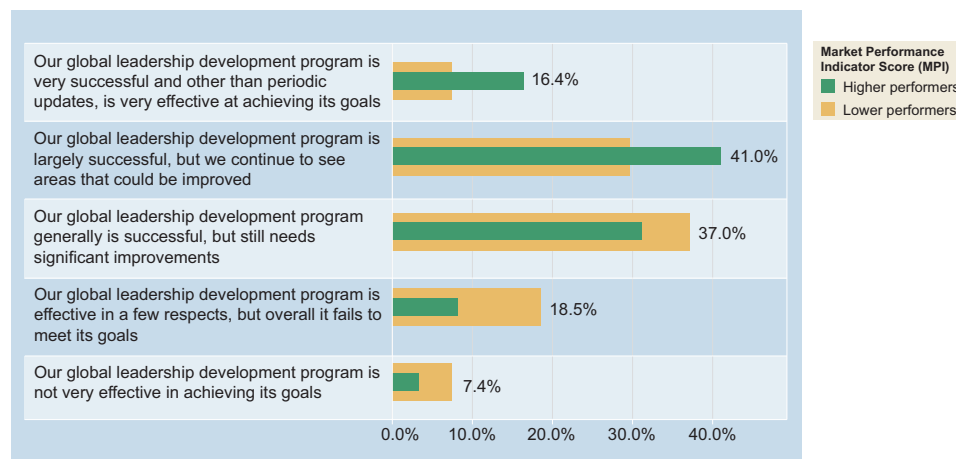
In 2010 42% of companies with global leadership development programs reported that they were “highly effective”. A year later the percentage of companies reporting that their programs were either “highly effective” or “largely effective” improved to 47%. This improvement trend continued in 2012, with more than 51% of companies overall reporting that they believe that their global leadership development programs are “highly effective” or “largely effective.” This is a striking finding, representing nearly a 25% improvement in effectiveness in just two years.

This improvement in the effectiveness of global leadership development programs has affected both high- and low-performing companies; 57% of high-performing companies indicated that their programs are effective compared to 52% in 2011. Low-performing companies also saw an improvement, with 37% reporting that their programs are effective, compared to 32% in 2011.

The most striking finding is the dramatic drop in dissatisfaction expressed by lower-performing companies regarding the effectiveness of their global leadership development programs. In 2011, a full 21% of low-performing companies reported that their global leadership development programs were “not effective in achieving its goals” (contrasted to 6% of high performing companies). In 2012, the percentage of low-performing companies reporting that their programs are not effective dropped to a little over 7%, while dissatisfaction expressed by high-performing companies with the effectiveness of their programs dropped to just over 3%.

Overall, these trends demonstrate greater focus—and success—in improving the effectiveness of global leadership development programs by both high- and low-performing companies. It stands to reason that in the midst of a lingering global recession, programs that are not effective at achieving their goals are quickly improved or risk being eliminated altogether.

Please select the statement below that best describes your opinion of the overall effectiveness of your organization’s global leadership development program.



Key Finding 4

The leading competencies that are the focus of global leadership development remain remarkably consistent over time. However, an examination of the mastery of these competencies identifies some key areas for improvement and competitive advantage.

When asked which competencies were important to include as key components of their global leadership development programs, respondents were remarkably consistent from 2011 to 2012. The five most common competencies included in these programs were as follows:

2011	2012
1. Change management	1. Change management
2. Critical thinking and problem solving	2. Critical thinking and problem solving
3. Strategy development	3. Ability to influence and build coalitions
4. Execution of global strategies	4. Strategy development
5. Ability to influence and build coalitions	5. Execution of global strategies

What is particularly noteworthy is that this array of competencies has remained exceptionally consistent despite the fact that survey respondents were asked to identify them from a master list of 20 competencies.

With this consistency in mind, the 2012 study delved deeper, examining not only the level of importance of various competencies, but comparing that to the degree to which companies believed that their global leaders had successfully mastered them. This gap identifies key areas for improvement as well as areas in which companies can capitalize on the fact they share a common list of competencies they identify as important, but may not be exceptionally successful at delivering programs that help global leaders master them.

When both importance of a competency and the degree to which that competency has been mastered are considered together, the top 10 key competitive opportunities for learning are revealed. Additionally, as demonstrated in the chart below, mastery of each of the top 10 leadership competency opportunities are significantly correlated to the Market Performance Index (MPI).

To what extent are the following competencies included in your global leadership development program? To what extent do you believe that your management team has successfully mastered these competencies?

Percent of respondents indicating "high" or "very high" extent

Competency	% Included	% Mastered	Gap %	MPI Corr.
Change management	64.5	34.0	30.5	.30**
Ability to influence and build coalitions	59.0	36.0	23.0	.28**
Critical thinking/problem solving	62.0	42.5	19.5	.28**
Leading cross-cultural teams	49.5	31.5	18.0	.23**
Managerial agility	51.5	35.5	16.0	.27**
Emotional intelligence	43.5	28.5	15.0	.26**
Creativity	38.5	23.5	15.0	.34**
Strategy execution	57.5	43.0	14.5	.26**
Strategy development	58.5	45.5	13.0	.27**

* Indicates a statistically significant correlation between competency mastery and Market Performance (MPI)

As an additional note, while the list of top 10 competency opportunities above have remained consistent with the opportunities identified in the 2011 edition of this study, the correlation between mastering each of the competencies and the MPI has risen dramatically.

Key Finding 5

When asked to identify the single most important focus of their global leadership development programs, high-performing companies clearly focus on interpersonal influence and coalition building as their top priority.

While the previous Key Finding demonstrated that the overall curriculum content of global leadership development programs appears to be durable over time, a new finding in 2012 clearly identifies a difference between high-performing companies and their low-performing counterparts—priorities.

Past iterations of this study asked about the various components that are generally included in global leadership development programs. However, in 2012, with an eye on limited budgets and resources, the study also included a question related to the single top priority focus of the organization's program. Responses revealed not only clear differences between high- and low-performing companies, but a particular focus of high-performers on the interpersonal skills of influence and coalition-building.

High-performing companies overwhelmingly reported that the top priority for their global leadership development programs is to develop leaders' ability to influence and build coalitions. In fact, just under 30% of high-performing companies indicated that this is their top priority. To contrast, 11% of low-performing companies view influence and coalition building as the central focus of their global leadership development programs. Among the remaining high-performing companies, strategy execution (14%) and strategy development (11%) were identified as the next tier top priorities.

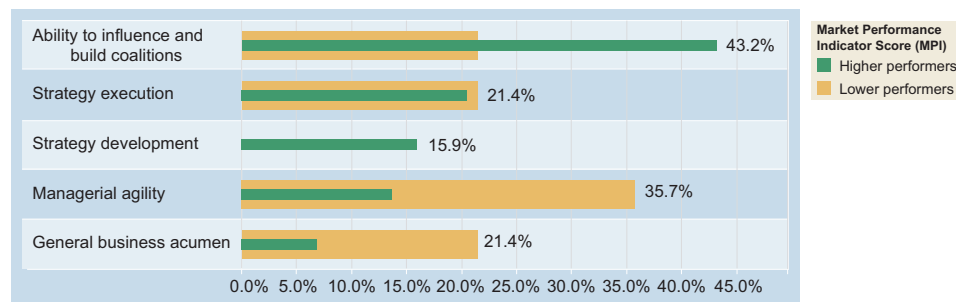
There was less of a clear single focus among low-performing companies—the competency most low-performers identified as their top priority was managerial agility (18%), followed by a tie between influencing and building coalitions (14%) and strategy execution (14%).

The results of this question are less noteworthy when one compares the array of priorities among high- and low-performing companies. Instead, it is striking that a single priority—*influence and coalition building*—emerged as such a dominant top priority of high-performing companies and, by comparison, very few low-performing companies focus on this competency as their top priority.

While this question didn't capture the rationale behind the high-performers' emphasis on influence and coalition building, there are some insights that this finding might provide.

1. Interpersonal influence and coalition building is critical in an organization that is continuing to face rapid internal and external forces of change, requiring global leaders to be both agile and influencers of others' agility as well.
2. In a global economy in which macro-economic forces are in flux, corporate strategies need to remain flexible on the ground, requiring local leaders to take action without much guidance from above. This goes beyond being agile or the ability to develop and execute strategy. Today's global leaders appear to need to be able to win over the hearts and minds of others to build consensus and action around regionally-built courses of action.

Select the competency listed below that clearly represents the most central focus of your organization's global leadership development program.



Key Finding 6

High-performing companies not only use metrics to evaluate their global leadership development programs more than lower-performers, they continue to use a wider variety of evaluation metrics.

The trend toward using various forms of quantitative methods for evaluating global leadership development programs appears to be increasing. In 2011 59% of all responding companies indicated that they used some combination of metrics to evaluate their programs. This number has increased slightly to 62% in the 2012 edition of this study.

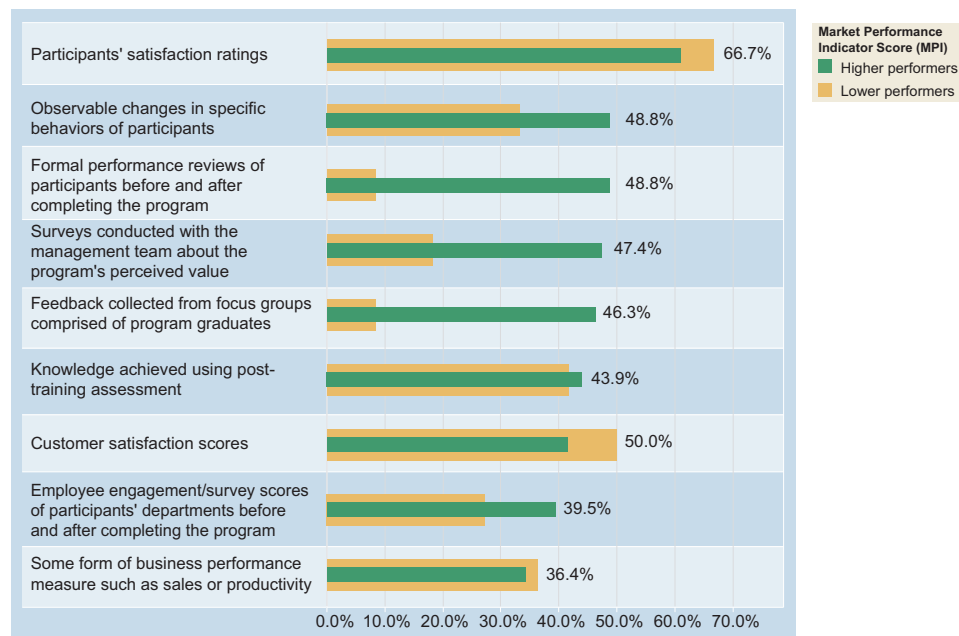
However, it is striking that high-performing companies are pursuing this trend more vigorously than their lower-performing counterparts. The percentage of high-performing companies that use metrics to evaluate their global leadership programs leapt from 59% to 70% from 2011 to 2012, while the percentage of low-performing companies that use evaluation metrics actually fell from 41% to 30%. This marks a statistically significant correlation between market performance and the use of evaluation metrics (.22)

Not only are high-performing companies more likely to use quantitative measures to evaluate their global leadership development programs, they also use a much wider variety of measures, collected from a broader array of sources, compared to low-performing companies.

As the graphic below illustrates, there are seven separate metrics that are employed simultaneously by at least 40% of high-performing companies to evaluate their global leadership development programs. This compares to just three (participant satisfaction scores, post-training assessments, and customer satisfaction scores) employed by low-performing companies. This triangulation approach employed by high-performing companies includes traditional evaluation metrics, but also includes feedback from a wide array of stakeholders, essentially creating somewhat of a 360-degree feedback method for evaluating the programs.

To what extent does your organization use the following metrics to evaluate the success of your global leadership development program?

Percent of respondents indicating “high” or “very high” extent



Key Finding 7

Formal performance reviews are becoming less popular as a method for evaluating the effectiveness of global leadership development programs; low-performing companies appear to be abandoning them altogether.

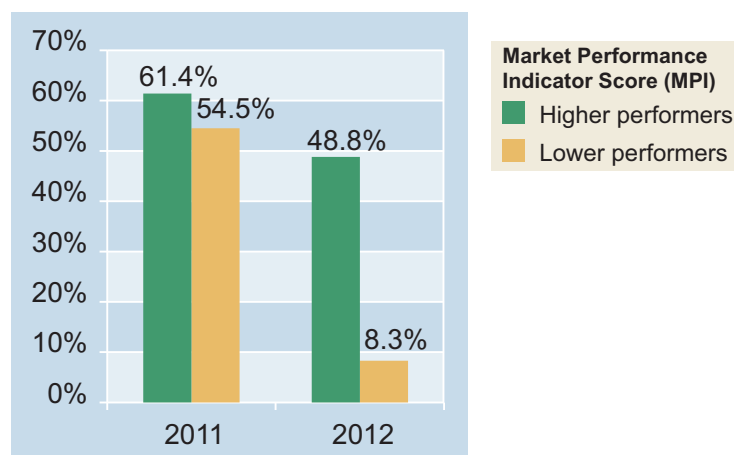
Performance reviews have long been a key method for evaluating whether or not participants in learning programs of all kinds have successfully developed the competencies targeted by the programs. This was apparent in the 2011 edition of this study in which 61% of high-performing companies reported that they use performance evaluations of participants as a key method of evaluating the effectiveness of the programs, compared to 54% of low-performing companies. While there was a difference between them, this difference was not significant, nor especially noteworthy.

However, the 2012 edition of the study reveals that there is a drop in the use of formal performance reviews as a method of evaluating leadership development programs (53% in 2011 compared to 36% in 2012). And, while high-performing companies reported that they are less dependent on them compared to the past (61% in 2011 compared to 49% in 2012), low-performing companies appear to be abandoning formal performance reviews altogether. In 2011 54% of low-performing companies reported using formal performance reviews of participants to evaluate the effectiveness of their global leadership development programs. However, in 2012, *only 8% of low-performing companies report using formal performance reviews whatsoever.*

While this finding may reflect the ongoing struggle with the accuracy and value of formal performance review programs in general, the question should be raised among low-performing companies—are they taking this skepticism to the extreme? This may be a reckless course of action when combined with Key Finding 6, which shows that low-performing companies use far fewer measures to evaluate their global leadership development programs to begin with.

To what extent does your organization use formal performance reviews of participants before and after completing the program to evaluate the success of your global leadership development program?

Percent of respondents indicating “high” or “very high” extent



Key Finding 8

The content of global leadership development programs is derived from a variety of strategic and values-driven sources. However, while corporate values remain important, they are now ranked less important than long-term strategies and input from the senior management team.

Both high- and low-performing companies reported that the source of much of the curriculum they develop for their global leadership development programs is derived from a number of sources. However, the most common sources are the long-term strategies that company, specific requests or suggestions elicited from members of the senior management team, along with the expressed organizational values of the company.

However, there appears to be a shift in the priorities among these sources from 2011 to 2012. In 2011, 75% of high-performing companies indicated that they derived their direction for their global leadership development programs from the expressed values of their company. In 2012, this percentage remained virtually unchanged, with 73% of high-performing companies reporting that their values, in-part, drive their curriculum.

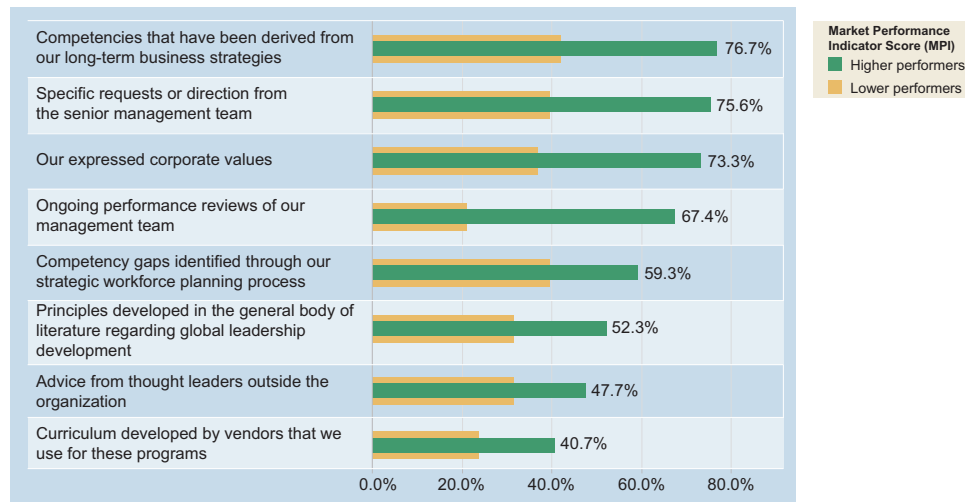
However, in 2011, two other sources—the long-term strategies of the company and input from the senior management team—were somewhat less commonly referenced than corporate values among high-performing companies (69% and 67%, respectively). In 2012, the long-term strategies of the company became the leading source of content for global leadership development programs, with more than three-quarters (77%) now reporting that they derive their content from these strategies. Additionally, 76% of high-performing companies develop the content for their programs through consultation and input from the senior management team.

While this shift doesn't discount the importance of integrating the values of the company into the curriculum for global leadership development programs, it does appear to demonstrate a shift toward a balance between values-based content and content driven by the overall strategies of the business and input from executives.

Another small but notable change in the sources tapped for developing the content of global leadership development programs is the greater reliance on the input from vendors. High-performing companies in particular appear to be integrating content provided by the vendors that they hire to administer these programs. In 2011, 35% of high-performing companies sought content input from their vendors, while in 2012, more than 40% now rely on their vendors for content. While this is not a significant increase, it is the only source of content that has increased other than long-term strategy and executive team input noted above. It stands to reason that the recession has continued to force companies to reduce internal capacity for curriculum development, with greater reliance on consultants and vendors.

To what extent is the content of your organization’s leadership development program driven by the following?

Percent of respondents indicating “high” or “very high” extent



Key Finding 9

Overall, members of the senior management team are becoming less active in global leadership development programs.

The 2011 edition of this study found that members of the senior management team were active in a wide array of aspects of the development, execution, and evaluation of global leadership development programs. However, in 2012 respondents indicated that their involvement has dropped considerably on every aspect of involvement on the survey.

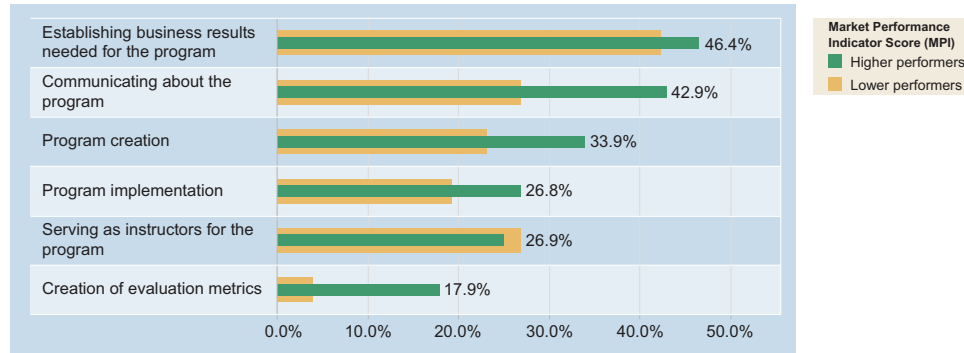
And this trend is not isolated to low-performing companies. While high-performing companies generally involve members of their senior management teams in a wide array of roles, even high-performers reported that the involvement of their senior management team has dropped considerably from 2011.

The only dimension that reflects any increased involvement is the use of the senior management team as instructors—and this increase is isolated entirely to low-performing companies.

It is unclear why senior managers are generally becoming less involved in their company’s global leadership development programs, but all companies may want to consider these results and examine whether or not they might be risking the isolation of their leadership development programs from the overall global business strategies that they are designed to support.

To what extent are members of the senior management team involved in the following aspects of your global leadership development program?

Percent of respondents indicating “high” or “very high” extent



Key Finding 10

The trend of using outside vendors or content experts to develop or deliver global leadership development programs continues to increase.

In the first edition of this study (2010), 65% of respondents who indicated that they had global leadership development programs in place indicated that they used outside vendors or content experts to help them develop and/or execute their programs to a “high” or “very high” extent. That percentage increased to 74% in 2011. In 2012, this demand for outside vendors has risen to 80%, representing more than a 20% increase in just two years.

There are many factors that are likely leading to this increase, including renewed investment in leadership development and learning programs in general in the improving global economy. Additionally, as companies cut back on internal staff during the recession, many have concluded that in order to maintain or improve their global leadership development programs, they must rely on outside sources of talent. It could also be that former internal developers of these programs, who found themselves cut back during the recession, are now offering their services in the “free agent” talent market. Regardless of the speculative reasons for this greater reliance on vendors or content experts, the trend is steadily increasing.

Additionally, there is striking consistency in why companies are seeking out the services of vendors and content experts. Among companies that use outside vendors, two reasons are consistently cited as the most important reasons for doing so: the vendors’ proven ability to execute global leadership programs, and the subject matter expertise that they provide.

However, one difference among high-performing companies’ priorities is that they are twice as likely as their low-performing counterparts to view a vendor’s ability to consistently execute these programs effectively over multiple geographic regions around the globe as critical. Over half (56%) of high-performing companies cited geographic reach as an important reason for selecting a vendor, as opposed to just 31% of low-performing companies.

To what extent do you expect the following from your supplier(s)/expert(s)?

Percent of respondents indicating “high” or “very high” extent

Reasons Vendors are Used	2010	2011	2012
Proven ability to execute	86.8%	83.9%	82.9%
Subject area expertise	84.4%	83.9%	81.5%
Ability to react effectively in an agile manner	70.3%	64.1%	67.1%
Accreditation	42.4%	44.8%	30.8%
Representation in multiple geographic locations	30.4%	38.5%	34.9%
Ability to handle multiple language requirements	34.3%	32.3%	32.2%

Key Finding 11

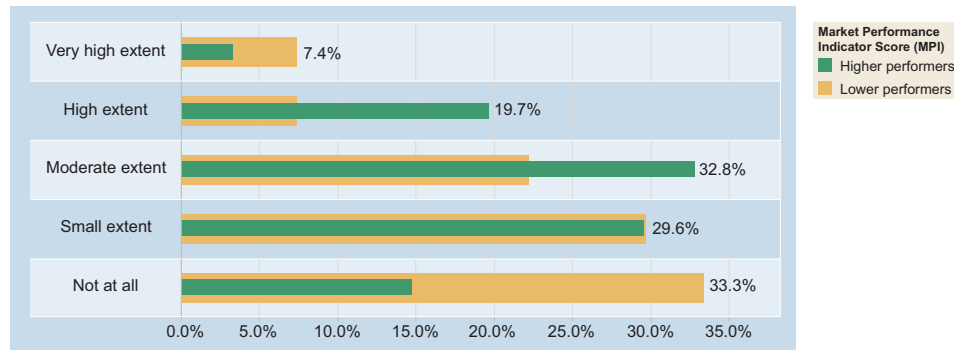
There appears to be a departure from customization of the content of global leadership development programs for specific regions or countries around the world. However, high-performing companies are continuing to move away from a one-size-fits-all model.

Approximately 40% of high-performing companies indicated in 2011 that they customized the content of their global leadership development programs to a “high” or “very high” extent for various regions or countries. This compared to just 25% of low-performing companies that reported customizing their programs. However, there appears to be a trend away from the focus on this type of customization. In the 2012 survey, just 23% of high-performing companies report that their global leadership programs are customized to a “high” or “very high” extent. Additionally, the percentage of low-performing companies with customized global leadership development programs has dropped to 14%.

However, it would be premature to make the assumption that global leadership development programs are not being customized to meet the local needs of leaders around the world. In 2011 17% of high-performing companies reported that they make no efforts whatsoever to customize the content of their global leadership development programs from country to country or region to region, compared to 29% of low-performing companies. In 2012, however, the percentage of high-performing companies that make no regional or national customizations dropped to 15% and the percentage of low-performers who don’t customize their global leadership development programs rose to 33%.

To what extent is your global leadership development program customized from region to region or country to country?

Percent of respondents indicating “high” or “very high” extent



Key Finding 12

Despite a lack of region- or country-specific content of leadership development programs, increasingly language skills are becoming important for leaders who work in global roles, particularly among high-performing companies.

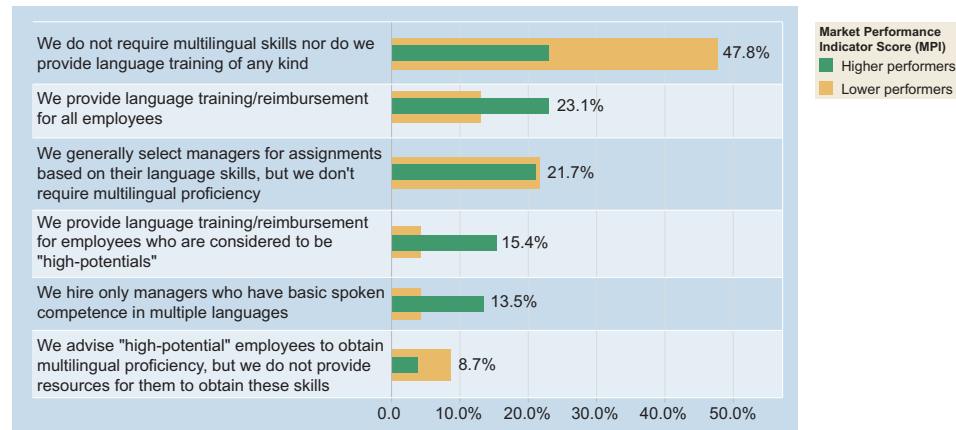
There appears to be an increasing emphasis on multilingual skills as a key to success for global leaders. In fact, more than 13% of high-performing companies indicate that they *only* hire multilingual candidates for management positions (up from 10% in 2010).

As further indication of a desire for a multilingual global leadership team, the percentage of high-performing companies that report providing language training for all employees has more than doubled, from 9.5% in 2011 to 23% in 2012. Additionally, there is a corresponding drop in the percentage of high-performing companies that report that they advise “high-potential” employees to acquire language skills *but do not assist them in acquiring them* from 13.5% in 2011 to 3.8% in 2012.

Regardless of the notion that English is currently the predominant language of business in the world, there appears to be a gradual increase in the understanding that English may not be the exclusive business language in the future.

Which statement below best describes your company’s perspective on the language skills of managers who serve in international or global roles?

Percent of respondents indicating “high” or “very high” extent



Key Finding 13

The competencies that will be needed for global leaders over the next 10 years is remaining largely consistent, with a greater focus on cross cultural innovation and a greater emphasis on the use of technology.

Eight of the top 10 opportunities for global leadership development are the same as those that appeared in the 2011 list. Only managerial agility and mastery of social networking technology emerged in 2012 as new opportunities for the global leaders of the future.

Survey respondents agreed that managing virtually in more matrixed organizations will be critical, along with being able to adapt to and manage in a cross-cultural environment. However, there is also a growing understanding that mastery of technologies—associated both with virtual communications and social networking—will also be important assets in the skill sets of global managers of the next decade.

However, the competencies most closely correlated with market performance appear to be two competencies associated with collaborating and innovating with colleagues across cultural boundaries.

Future Competency	% Important	% Mastered	Gap	Mpi Corr.
Managing virtual teams	62.8%	22.3%	40.5%	0.16
Managerial agility	72.3%	33.1%	39.2%	0.10
Cross-cultural employee engagement	59.5%	23.3%	36.2%	0.09
Managing in a matrixed organization	60.8%	27.0%	33.8%	0.12
Managing innovation in multicultural setting	57.4%	24.3%	33.1%	0.28**
Mastery of social network technology	41.9%	12.2%	29.7%	0.05
Collaborating with peers from multiple cultures	63.5%	36.5%	27.0%	0.22**
Mastery of latest advances in virtual technology	45.3%	19.6%	25.7%	0.05
Applying ethical standards in multiple cultures	51.4%	34.5%	16.9%	0.17*
Multi-country supply chain management	40.5%	23.6%	16.9%	0.19*

Conclusion

This third annual global leadership development study has revealed a number of powerful insights that may benefit organizations that aspire to compete globally. There are some remarkably consistent findings from the 2010 and 2011 studies, which gives a greater sense that the design of these programs is relatively consistent across organizations and time.

However, it is important to understand that, while this study represents a broad swath of the global business community, it does not presume that every industry, company, or culture requires the same approach to global leadership. Therefore, the readers of this study should balance the insights herein with their own valuable experience and understanding of the unique needs and goals of their organizations.

Appendix

Demographic Questions

Primary Industry

Response	Percent
Aerospace & Defense	2.1%
Agriculture	1.0%
Automotive & Transport	1.6%
Banking	1.9%
Beverages	0.3%
Business Services	6.3%
Charitable Organizations	1.4%
Chemicals	1.1%
Computer Hardware	0.2%
Computer Services	1.2%
Computer Software	3.1%
Construction	2.1%
Consumer Products Manufacturers	2.1%
Consumer Services	0.9%
Education	11.0%
Electronics	0.5%
Energy & Utilities	4.5%
Environmental Services & Equipment	1.0%
Financial Services	5.6%
Food	1.3%
Foundations	0.3%
Government	9.5%
Health Care	8.1%
Industrial Manufacturing	5.9%
Insurance	2.8%
Leisure	1.1%
Media	0.5%
Membership Organizations	1.4%
Metals & Mining	0.7%
Other	8.9%
Pharmaceuticals	4.0%
Real Estate	0.5%
Retail	2.9%
Security Products & Services	0.2%
Telecommunications Equipment	0.4%
Telecommunications Services	1.4%
Transportation Services	2.2%

n=1213

Size of Workforce Throughout the World

Response	Percent
1–24 employees	12.2%
25–49 employees	3.3%
50–99 employees	6.3%
100–249 employees	8.2%
250–499 employees	7.3%
500–999 employees	8.1%
1,000–4,999 employees	20.2%
5,000–9,999 employees	10.1%
10,000–19,999 employees	6.8%
20,000–49,999 employees	6.8%
50,000–99,999 employees	5.2%
More than 100,000 employees	5.5%

n=1213

Geographic Structure

Response	Percent
Global (high level of global integration)	31.2%
Multinational (national / regional operations act independently)	19.5%
National (operations in one country only)	49.3%

n=1213

Job Level

Response	Percent
Board Member/Chairperson	1.2%
CEO/President	6.3%
Partner/Owner	4.2%
C-Level Executive	3.1%
EVP/SVP	2.7%
VP	6.8%
Director	21.6%
Manager	30.3%
Supervisor	5.2%
Individual Contributor	12.4%
Other	6.2%

n=1213

Department/Function

Response	Percent	Response	Percent
Accounting/Finance	4.9%	Market Research	0.5%
Administrative	3.0%	Operations/Production	5.2%
Consulting/Advisory	3.6%	Other	4.6%
Creative Services	0.2%	Planning	0.9%
Customer Service/Account Management	1.7%	Procurement/Sourcing	0.6%
Engineering	2.0%	Product Development/Design	1.1%
Executive/Owner	5.6%	Public Relations/Communications	1.0%
Facilities Management	0.5%	Quality Control	2.4%
General Management	3.9%	Research & Development (Product related)	1.3%
Human Resources	21.8%	Sales/Business Development	3.9%
Information Technology	3.2%	Supply Chain/Logistics	1.4%
Legal	0.7%	Training	23.8%
Marketing/Advertising	2.2%		

n=1213

Please indicate your organization's performance in the following areas:

Question	At an all-time low	Significantly worse	About the same	Significantly better	At an all-time high
Compared with the past five years, your revenue growth is...	3.4%	12.3%	40.9%	35.7%	7.7%
Compared with the past five years, your market share is...	1.6%	7.5%	51.7%	34.0%	5.2%
Compared with the past five years, your profitability is...	3.3%	13.6%	44.5%	33.8%	4.8%
Compared with the past five years, your customer satisfaction is...	0.8%	4.7%	51.7%	37.6%	5.2%

n=1092

Generally speaking, how would you gauge your organization's performance?

Response	Percent
We're in bad shape	0.6%
We perform at below-average levels	8.2%
We're about average for our industry	31.0%
We're better than average	52.0%
We're in great shape	8.2%

n=171

Organization Type

Response	Percent
Governmental	17.4%
Nonprofit	17.3%
Private (shares are not traded on the stock market)	41.1%
Public (shares are traded on the stock market)	24.2%

n=741

Total revenue for the entire organization worldwide (in US Dollars)

Response	Percent
\$0–\$0.99 million	17.3%
\$1–\$1.99 million	4.6%
\$2–\$4.99 million	5.3%
\$5–\$9.99 million	6.3%
\$10–\$49.99 million	16.0%
\$50–\$99.99 million	6.7%
\$100–\$499.99 million	12.6%
\$500–\$999.99 million	5.3%
\$1–\$1.99 billion	6.0%
\$2–\$4.99 billion	5.3%
\$5–\$9.99 billion	4.7%
\$10+ billion	9.9%

n=637

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