

ASIA PACIFIC LEADERSHIP DEVELOPMENT PRACTICES STUDY REPORT





CONTENTS

▶ INTRODUCTION	01
▶ INSIGHTS	03
▶ DETAILED SURVEY RESULTS	09
– LEADERSHIP DEVELOPMENT STRATEGY	10
– LEADERSHIP ASSESSMENT	19
– LEADERSHIP DEVELOPMENT	23
– PERFORMANCE/SUCCESSION	32
– DEVELOPING GLOBAL LEADERS	38
– UNIQUE COMPETENCIES FOR ASIA PACIFIC LEADERS..	41
▶ CONCLUSION	47
▶ SURVEY DEMOGRAPHICS	48
▶ A STRATEGIC AND INTEGRATED APPROACH	51
▶ CONTACTS	52

INTRODUCTION



ABOUT THE SURVEY

The leadership pipeline is routinely cited as one of the biggest challenges facing organizations across Asia Pacific. This report offers organizations and those interested in the leadership pipeline the most comprehensive view available of current leadership development practices within the region.

The primary purpose of this study is to develop insights into the current state of leadership *strategy, assessment, development* and *succession management* in Asia Pacific. The research looks at companies’:

- **Leadership development strategies**, including how they articulate their philosophy and tactics for grooming leaders and how they define their leadership competencies or success profiles.
- **Leadership assessment practices**, including their methodologies, tools and processes for identifying strengths and leadership gaps.
- **Leadership development practices** for grooming one or more levels of leaders.
- **Leadership performance and succession practices**, including the process of managing leadership performance and their approach and tools for effectively managing succession.

With data gathered through online surveys completed by 663 organizations across the region, this study reveals how companies are approaching each of these elements and where common gaps exist that hinder the ability of organizations to build leaders from within. This study also examines how effective organizations in Asia Pacific are in developing global leaders as well as the unique leadership competencies that organizations think are critical for success in the region and the relative strength of these competencies among their leaders.

Supplementing the survey data are in-depth interviews with over 30 organizations that have proven successful in grooming leaders to meet business needs. All of the case studies created as a result of these interviews can be accessed at www.mercer.com/leadership-asiapac.

INSIGHTS



KEY INSIGHTS FROM RESEARCH

As the results of this research make clear, good things are happening in the Asia Pacific region with respect to leadership development. Over half of the companies we surveyed have defined leadership development strategies, many of which articulate the most critical components of leadership development, from how to develop and assess leaders to how to manage succession. Many are spending significant sums to develop their senior level and global leaders – and they are using several highly effective tools to do so including “stretch” and overseas assignments.

Organizations are also doing a great job providing feedback to leaders from assessments and are providing more or different types of development opportunities and rewards to individuals identified as critical or high potential future talent.

On the other hand, the research also reveals a number of opportunities for improvement, particularly around execution. For example, while many companies say they have criteria for assessing leaders in their leadership strategy, very few hold managers accountable for developing future leaders. Clearly, more work needs to be done to maximize the impact of individual development plans. And while three-quarters of organizations say they have a process for managing succession, only 17% say they have the technology in place for this complex task. Furthermore, only half of companies report that they can effectively identify who is ready for the next move up the leadership pipeline or that they have “ready-now” successors in place for all critical roles.

The following are key insights into the state of leadership development practices in Asia Pacific:

1. While strategies are in place in many organizations, execution remains a significant problem.

Many organizations in Asia Pacific are taking a comprehensive approach to grooming leaders from within, with 58% reporting that they have a defined and agreed leadership development strategy. Moreover, participants report that these strategies contain many of the key elements necessary for a robust strategy.

Where organizations are having more difficulty is around executing those strategies to move the needle on leadership development. Fifty-one percent of companies say their performance management processes are not effectively identifying who is ready for the next move or position within their leadership pipeline. Three-fifths of companies are not regularly conducting leadership pipeline projections to plan for future leadership needs.

Among all companies surveyed, 59% say they do not hold line managers accountable for developing future leaders at all or do so to a small extent. Even among companies that conduct pipeline projections to forecast future leadership needs, only 25% hold line managers accountable to a considerable or great extent.

In terms of having strong, “ready-now” successors in place for every critical role in the leadership pipeline, 51% of companies say they do to a small extent or not at all.

2. Systems and processes for executing talent management processes are extremely inefficient.

The leadership development process in Asia Pacific is exceptionally inefficient, largely because the infrastructure necessary to execute the leadership agenda is missing. Eighty-nine percent of companies continue to use paper-based forms or e-mailed “Word” or other similar documents to enable and track the execution of their talent management processes. Only 46% of companies report the use of any kind of talent technology system to support talent management processes.

Succession planning is a critical component of robust leadership development practices. While 63% of organizations in Asia Pacific say they have succession plans in place at least for their top tier leaders, 58% have no technology platform to manage this complex process. Given the high rate of turnover in the region, relying on a highly labor-intensive, manual process for succession planning undoubtedly impedes the ability of organizations to move talent up the leadership pipeline effectively. Yet only 35% of companies say they plan to develop or implement new technology to support succession planning in the next two years; 31% say they have no plans to implement new technology.

3. Organizations are not focusing leadership development efforts on women as a segment.

Women continue to make up a small percentage of senior leadership in organizations in Asia Pacific. In 37% of organizations, women make up 5% or less of those in the top 100 most senior roles. Women leaders hold more than 30% of senior positions in only 14% of organizations.

At the same time, over half of organizations surveyed say they have no barriers preventing women from advancing to senior leadership positions. Yet even among these organizations, women hold few top leadership roles, with women still making up 5% or less of top leadership in 28% of organizations and holding more than 30% of senior positions in only 20% of organizations.

A major problem contributing to this outcome is organizations’ lack of focus around developing this segment. Among organizations with a defined and agreed leadership development strategy, only 42% specifically address female leaders as a unique segment important to the company.

This study also confirms findings from previous Mercer research that few companies in Asia Pacific have a diversity strategy for developing female leaders. While 72% of companies participating in this survey lack a defined diversity strategy for female leaders, Mercer’s Women in Leadership¹ research, conducted globally in 2011, found that 73% of companies in Asia Pacific lack such a strategy for women. A follow-up study in 2012 on diversity and inclusion in Asia Pacific found that even among companies that have diversity strategies in place, only 13% offer women leadership development programs as part of their diversity efforts.²

Among those companies that acknowledge barriers to advancement by female leaders, a large percentage blame managers, either because they are unwilling to promote non-traditional candidates or simply because they are biased. Organizations also blame women themselves, pointing to the unwillingness of women to request development experiences or promote themselves.

¹ Women’s Leadership Development Survey, Mercer, 2011

² Mercer Asia Pacific Diversity & Inclusion Research, 2012

4. Companies continue to rely on expatriates for top leadership roles, calling into question the effectiveness of leadership development and localization strategies.

Although a majority of companies in Asia Pacific say they have robust leadership strategies, 29% currently have expatriates in more than 30% of their top 10 leadership roles and only 20% of organizations report that locals hold all top leadership positions.

The numbers of expatriates in top roles is even higher in some markets: 60% of companies surveyed in Hong Kong have expatriates in more than 30% of their top 10 roles, while 37% of ASEAN companies and 35% of Japanese companies report the same. Companies in other markets rely much less on expatriates: 42% of companies in Australia/New Zealand have no expatriates in the top 10 roles. Only 10% and 12%, respectively, of companies in India and South Korea have expatriates in more than 30% of their top leadership roles, but only 10% and 17%, respectively, of companies in these markets have no expatriates in top roles. The fact that so many organizations are still relying on expatriates calls into question the effectiveness of their leadership development strategies.

Part of the problem likely stems from the lack of effective localization strategies: 30% of companies have no localization strategy and 14% say their strategy is not delivering results. Many blame the lack of qualified local staff and the speed of growth in the region for their difficulties in localizing top roles. Companies' leadership development efforts are not keeping pace with the demand for leaders.

5. A lack of funding is NOT one of the barriers to leadership development.

When it comes to funding leadership development, companies are willing to invest, at least when it comes to top-level leaders. Almost a third of companies are spending more than USD5,000 per person annually to train and develop their senior level and global leaders. And 62% use overseas assignments, one of the most expensive as well as one of the most effective development tools, as part of their development program.

In addition, only 29% of organizations cite insufficient funds for development as a barrier to achieving their development goals, while only 7% of companies cite insufficient investment in local leaders as a barrier to localization of roles.

Of course, development spending in the region is still not at the level sustained by companies in mature markets. According to Bersin & Associates, a US-based research and advisory services firm, U.S. companies with mature leadership development programs spend approximately USD12,400 per person on leadership development annually.³

6. Organizations may not be reaching deeply or early enough into their leadership pipelines.

Organizations are spending significant sums to develop leaders at the top of the house. This makes sense given the lack of critical skills at the top of the pipeline in Asia Pacific; when asked to rate the competencies of leaders in their organizations, companies give their global leaders the lowest marks among all leadership levels.

³ Leadership Development Factbook® 2012, Bersin & Associates/Karen O'Leonard and Laci Loew, July 2012.

But organizations are missing out on the opportunity to create a robust leadership pipeline by neglecting their youngest leaders. Recent Mercer research, conducted in partnership with Jay Conger, one of the world's leading experts on leadership, has found that organizations that do a good job of grooming global leaders reach deep into their leadership pipeline to begin developing those leaders sooner.⁴

When it comes to grooming middle level and frontline managers, organizations in Asia Pacific are spending far less than they do on higher-level leaders. To develop their youngest leaders – those on the frontline – 38% of organizations spend less than \$500 USD per person per year and 59% spend less than \$1,000 per person per year.

While a large percentage (76%) of companies address the specific development needs of middle manager in their leadership development strategies – a positive result given the importance of this group – only 63% address the development of young leaders and 49% the development of emerging market leaders. Too many companies are failing to target interventions for those at the bottom of the pipeline – the future leaders of tomorrow.

At the same time, fewer companies are linking assessment results to individual development plans for their frontline leaders than for any other segment of the leadership pipeline. It is not clear why companies go to the trouble and expense of conducting assessments if they are not to be used to design appropriate development interventions.

DEVELOPING LEADERS THROUGHOUT THE ORGANIZATION

In planning its '2K12' strategy in 2007, Main Roads Western Australia recognized that leadership needed to be a key focus area if it were to realize the organization's strategic goals and attract and retain the best talent given the Western Australia resources boom. In order to "create an environment that develops and recognizes leadership throughout the organization," it developed eight principles of leadership based on consultation with academic institutions, a research review, manager interviews and employee surveys. These leadership principles were used to create a leadership competency framework, leadership checklist and leadership development programs for graduates, middle managers, senior managers, emerging leaders and high potentials.

Planners identified a number of actions and initiatives to reinforce leadership principles, such as "inspiring others to create change" and promoting "leadership for all," and have gone to great lengths to embed leadership into not only HR people management practices, but also organization-wide strategic initiatives and even how meetings are run. "We made a conscious effort to say that it doesn't really matter where you sit within the organization – you have the opportunity to demonstrate leadership," says Melissa Phillips, Manager Organizational Development, Main Roads.

7. Leaders and managers are not being held accountable for grooming leadership talent.

Successfully grooming leadership talent from within requires the efforts of all managers and leaders in the organization. Yet 59% of organizations in Asia Pacific say that their people managers have little or no accountability for developing future leaders. Given the serious labor demand challenges facing organizations in Asia Pacific, frontline managers should have much more accountability for developing talent.

⁴ Mercer Point of View, New Insights on Leadership Development, 2011

In addition, 54% of organizations report that their top executives spend a very small percentage of their time (1%-10%) grooming current and future leaders. Only 19% spend more than 15% of their time on development. Given that the lack of qualified leadership talent is holding many organizations back from achieving their desired business results, it would seem desirable for top leaders to give this topic more attention. This is a particular issue for mid-sized companies; top executives at the largest companies (50,000+ employees) are devoting more time to this issue.

8. People-related competencies are not among those seen as most critical by organizations in Asia Pacific.

As part of this study, we asked companies to choose among 16 essential leadership competencies the three most critical for leaders in Asia Pacific. None of the top four competencies chosen have anything to do with leading and developing people. This calls into question whether companies in the region are placing sufficient emphasis on the need for their leaders to groom future leadership talent.

A recent study on employee engagement (What's Working™, Mercer, 2011) found that in Asia Pacific the quality of leadership is one of the top three factors driving motivation and engagement at work. The research also revealed substantial *declines* in engagement from previous studies in at least two markets, China and India, although scores in Singapore and Australia improved markedly. Even more alarming, core people management activities, such as career or performance management or giving timely feedback, received scores from employees that indicate significant room for improvement.

Given this correlation between leadership and engagement and, therefore, retention and stability, it is surprising that organizations place people competencies well down the list of those critical to leaders in the region.

9. Assessment methods focus on past performance not future potential.

The methods that companies use to assess the leadership capability of their leaders do not vary substantially based on the leader's level in the organization. For all leadership levels, the three most commonly used assessment tools are competency assessments (45%), 360-degree feedback (45%), and career achievement records (43%). Assessing for 'leadership potential' or 'readiness to take a more senior role' is one of the greatest needs in Asia Pacific, yet the methodologies that are being deployed focus on current performance or capability. Due to rapid career advancements, historical assessment techniques, such as career achievement records, 360 assessment surveys and behavioral based interviews may not work as well in Asia Pacific as they do in matured markets, especially at lower levels in the organization.

10. Companies are not employing the most effective methods for development.

Although one of the development methods rated most effective by respondents – challenging development opportunities, also known as “stretch” assignments – is also one of the most widely-used in Asia Pacific, companies continue to favor other less-effective development methods at the expense of more effective ones. Classroom training and individual development plans are examples of methods that are widely used but are not that well regarded. By contrast, organizations see action learning programs, mentoring, leadership coaching and defined career paths for developing leaders as highly effective, yet employ these methods less frequently. Perhaps a recalibration of development programs is necessary to maximize their impact on grooming leaders from within.

DETAILED SURVEY RESULTS



LEADERSHIP DEVELOPMENT STRATEGY

PRESENCE AND CONTENT OF LEADERSHIP DEVELOPMENT STRATEGIES

Of the companies surveyed, a surprisingly large percentage (58%) say they have a defined and agreed leadership development strategy in place. (See Exhibit 1.) This is good news for the future of leadership development in the region and evidence that grooming leaders is on the agenda – at least among multinationals in the region, which make up almost four-fifths (79%) of those with a defined and agreed leadership development strategy. (See Exhibit 2.)

“In today’s competitive business environment, we believe talent readiness is the primary issue. Other resources such as capital investment and sophisticated strategy are secondary issues.” – A manufacturing company

Among the 42% of organizations without a defined leadership development strategy, a greater proportion of them are local organizations (38% compared to 21% of those organizations with a strategy) with fewer employees. Organizations with fewer than 1,000 employees make up 45% of those without a defined leadership strategy in place; those with fewer than 5,000 employees make up 73% of companies without such a strategy. By contrast, smaller organizations (those with fewer than 1,000 employees) make up only 30% of organizations with a defined strategy, while those with more than 5,000 employees make up 47%. Organizations without a leadership development strategy are also more likely to be privately held than those with a defined strategy.

Exhibit 1: Percentage of companies with leadership development strategy

N=645

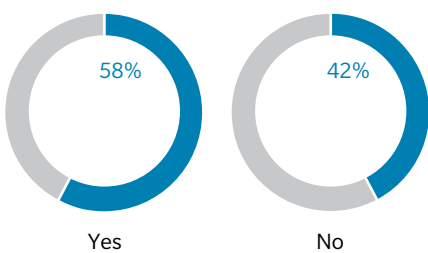
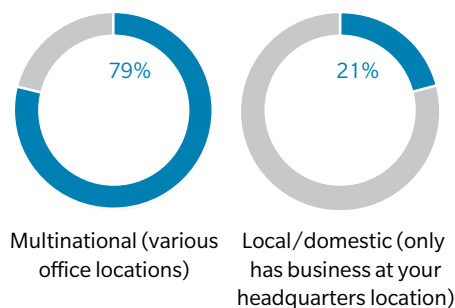


Exhibit 2: Organization type of companies with a leadership development strategy

N=377



BUILDING A NEW LEADERSHIP DEVELOPMENT STRATEGY

As a people business, Queensland Rail, the passenger rail organization of the Queensland government in Australia, recognizes the importance of each individual's contribution to delivering a safe and efficient rail network. In the past, the organization had "a traditional view of leadership development," providing a catalog of leadership courses that provided value at either an individual or an organizational level. However, these courses were not built around a strategic plan, were not progressive by level and did not assess and cultivate the total skill set required to drive business outcomes.

"Every two years we sent everyone to a series of workshops and then two years later we'd start again and sheep dip everybody again," says Michelle Barrett, Performance & Talent General Manager, Queensland Rail. "There was no sound diagnosis of what was needed. We gave our leaders a leadership development solution without understanding their needs."

The organization realized that it needed to answer key questions if it wanted to create a "bench" of future leaders:

- What are the leader competency requirements at each level in the organization?
- How do we support our leaders to work at the right level?
- How do we support our leaders to create growth and drive our business outcomes?

Also good news is the fact that a large percentage of those with a strategy report that it articulates many of the most important aspects of leadership development: 86% define a process and methods for [developing](#) leaders; 85%, the criteria and process for [assessing](#) leaders; and 76%, the process for [managing succession](#). (See Exhibit 3.)

Respondents' leadership development strategies are also likely to define the [competencies](#) required for leadership success at different levels of the leadership pipeline (e.g. frontline leaders, middle level leaders, senior level leaders) (82%) and the criteria and process for [identifying future leaders](#) (80%). (See Exhibit 3.)

IDENTIFYING LEADERSHIP COMPETENCIES CRITICAL TO SUCCESS

PTT Global Chemical, Thailand's largest integrated petrochemical and refining company, is experiencing tremendous growth both as a result of a recent merger and because of its expansion into additional countries through a new subsidiary. This has made the development of leaders at all levels throughout the company a strategic priority.

In the newly integrated organization, the leadership pool and workforce has diversified and expanded, providing more opportunities to move talent for both business and talent development reasons. However, different sub-cultures within the organization have different working styles, resulting in friction within the workforce and between leaders and their staffs.

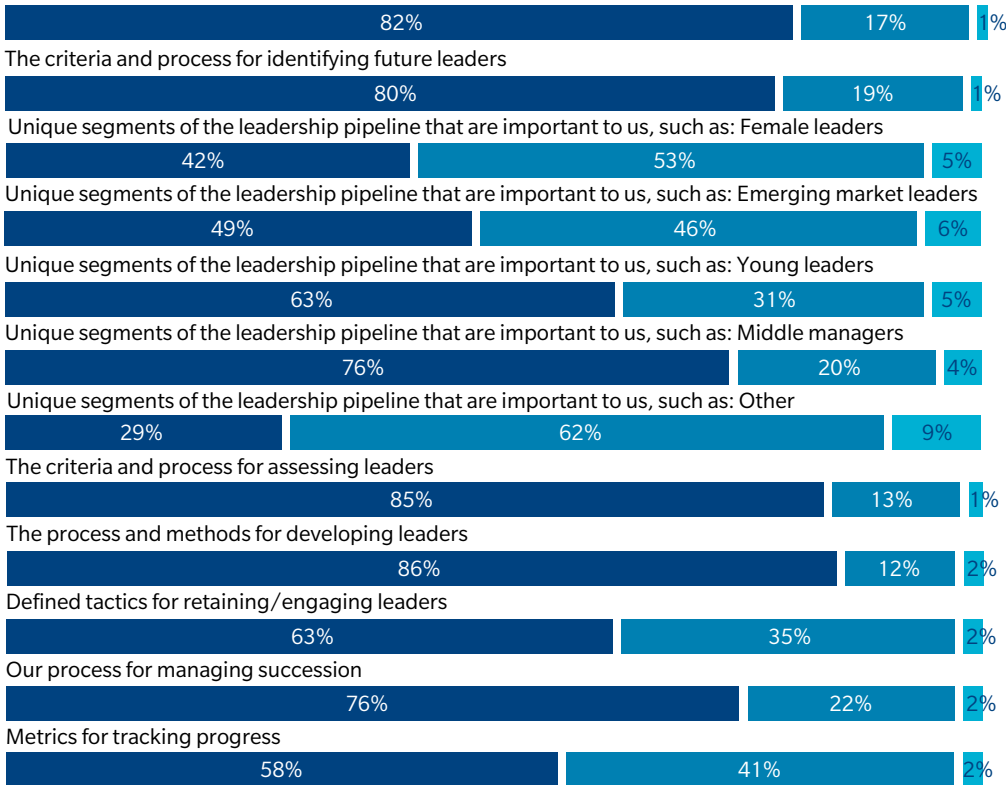
By analyzing its corporate strategy, the company identified the five leadership behaviors and competencies most important to success: Build Team, Build Trust, Be a Coach, Be Open and Lead Change. These five behaviors are being used to guide the development of leaders at all levels of the organization during its first year post-merger. This consistent leadership development program is promoting alignment across the organization.

At the same time, strategies are much less likely to articulate defined tactics for [retaining/engaging leaders](#) (63%) or [metrics for tracking progress](#) (58%). Moreover, while 76% of strategies address [middle managers](#) as a unique segment of the leadership pipeline that is important to the company, only 63% specifically address the development of [young leaders](#) and only 49% the development of [emerging market leaders](#). And despite the scarcity of [female leaders](#) in senior leadership roles across Asia Pacific, only 42% of strategies address female leaders as a segment important to the company. (See Exhibit 3.)

Exhibit 3: Elements articulated in companies' leadership development strategy

N=353

The competencies required for leadership success at different passages along the pipeline (e.g. frontline leaders, middle level leaders, senior level leaders)



- Yes
- No
- No response

ACHIEVING THE BUSINESS STRATEGY THROUGH LEADERSHIP DEVELOPMENT

Against a backdrop of aggressive market competition and a challenging economic climate, Estée Lauder designed a strategy to retain market share and maintain market leadership in its prestige cosmetics brands in Australia. Leadership was identified as a key driver of this strategy: an enabler of innovation and the attraction and retention of talent.

To start with, Estée Lauder developed a leadership strategy, a leadership competency framework for three leadership levels, and leadership success profiles. Following this, the company launched a program for its executives (Managing Director and direct reports). The company then developed a bespoke leadership program, 'E3', for the other layers of leadership, which focused on leading yourself, leading your team, and leading others.

The leadership program has been highly impactful as indicated by data showing clear behavioral changes on the part of participants. The organization assessed leaders using a 360-degree survey prior to participation in the program and again two months after the program to measure behavioral changes on leadership competencies.

BARRIERS TO DEVELOPMENT

Interestingly, companies in Asia Pacific blame a lack of time and attention much more so than a lack of money for any failure to meet their leadership development goals. Forty-five percent of companies cite insufficient time invested in development as a barrier preventing them from achieving their desired results in developing leaders, and 43% cite a lack of urgency by the organization around this issue. Around a third of companies (35%) also cite insufficient senior leadership attention. By contrast, only 29% cite insufficient funds for development as a barrier to achieving their development goals. (See Exhibit 4.)

Exhibit 4: Barriers preventing organizations from reaching leadership development goals

N=498

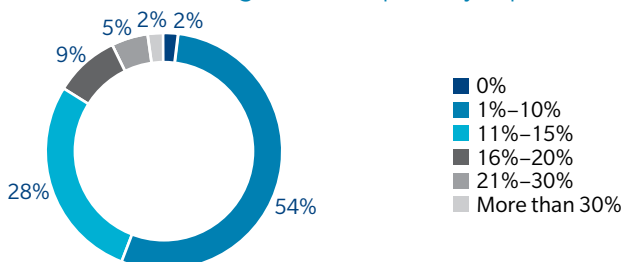


Attention from top executives

In most companies, top executives spend a very small percentage of their time grooming current and future leaders. Among all respondents, more than half (54%) say their top executives spend only 1%-10% of their time on leadership development. In 28% of companies, top executives spend slightly more time – between 11%-15% – on grooming leaders. (See Exhibit 5.) Given the importance of people issues as revealed in studies including Mercer’s global What’s Working™ research on employee engagement – and the fact that a third of companies identify senior leaders’ lack of attention to this issue as a major barrier to the achievement of leadership development goals – it appears that top executives are devoting insufficient time to this issue.

Exhibit 5: Percentage of time spent by top executives on grooming leaders

N=525



CEO ATTENTION IS CRITICAL TO SUCCESS

A key success factor for Sinclair Knight Merz (SKM), a leading projects firm, in building leadership capability is the genuine and willing involvement of the highest levels of the organization in leadership development programs. According to Nicole Girard, Learning and Development Manager for SKM, successfully grooming leaders from within “is about having the top level of leadership engaged and supporting people’s development.”

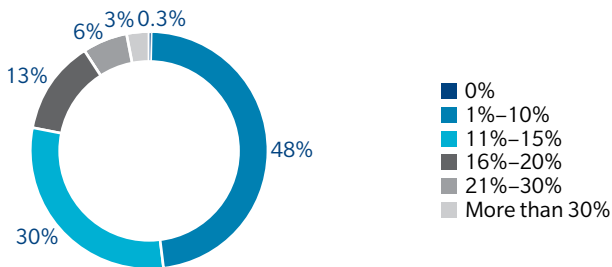
In evidence of this commitment, the CEO of SKM, along with 21 of the most senior people from the business, invest a considerable amount of time at the Graduate Development Conference, a formal three-day program delivered to second-year graduates. The CEO facilitates a session on the client and participates in a leadership panel that evaluates the graduates’ presentations.

“The business needs to own leadership development. Our senior business leaders ask different questions than HR does. If the initiative is seen to be led by the business and good for business, it is more powerful.” – Jane Keating, Executive Manager, Leadership and Culture, HR, Suncorp Group

Even among companies with a defined leadership strategy in place, only slightly more time is spent by top executives on leadership development. While 16% of all companies report that their top executives spend more than 15% of their time grooming current and future leaders, only 22% of those with defined leadership strategies say their top executives spend more than 15% of their time on development. (See Exhibit 6.) While leadership development is clearly on the C-suite agenda, it still may not be receiving the attention required to achieve desired results.

Exhibit 6: Percentage of time spent by top executives on grooming leaders among companies with a defined leadership strategy

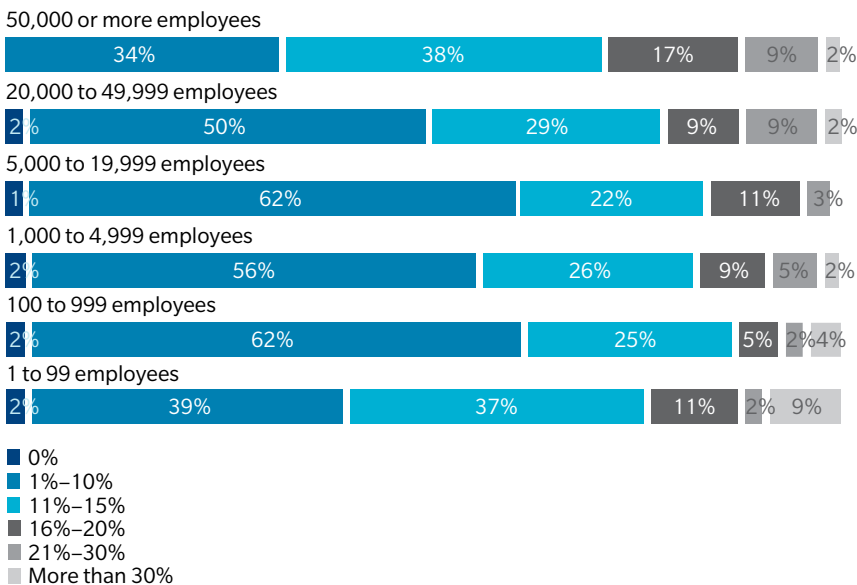
N=303



Among all organizations in Asia Pacific, top executives at the very largest – those with 50,000 or more employees – and the very smallest – those with fewer than 100 employees – are giving leadership development the most attention. At 28% of jumbo companies and 22% of the smallest companies, top executives are spending more than 15% of their time grooming current and future leaders. (See Exhibit 7.)

Exhibit 7: Percentage of time spent by top executives on grooming leaders, broken out by size of organization

N=525



PROJECTING FUTURE LEADERSHIP NEEDS

One important component in developing sufficient leadership talent for the future is conducting leadership pipeline projections to determine how many leaders will be needed. Only two-fifths of companies regularly conduct such projections. (See Exhibit 8.)

Even among companies with a defined leadership development strategy, only half (52%) analyze their likely future leadership needs. (See Exhibit 9.)

Exhibit 8: Percentage of companies that conduct leadership pipeline projections

N=528

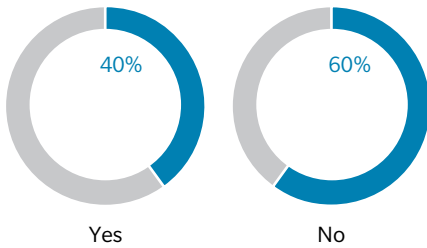
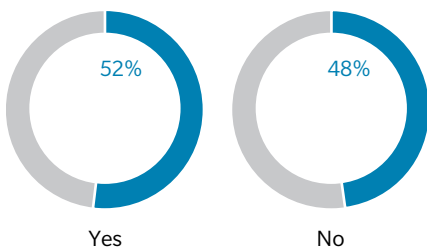


Exhibit 9: Percentage of companies with a defined leadership development strategy that conduct leadership pipeline projections

N=305



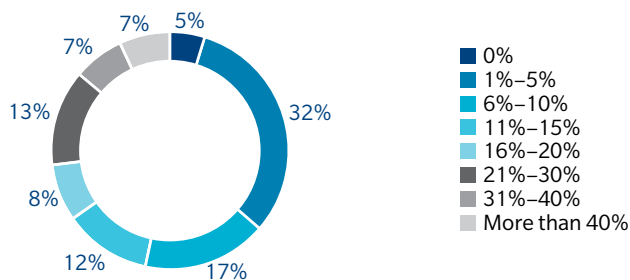
COMPOSITION OF TOP LEADERSHIP

Female leaders

Male leaders continue to hold most of the top leadership roles in organizations across Asia Pacific. Over a third (37%) of organizations report that 5% or less of their 100 most senior roles are held by female leaders; over half (54%) report that 10% or less of these roles are held by females. Only 14% of organizations have women in 30% or more of their top leadership roles. (See Exhibit 10.)

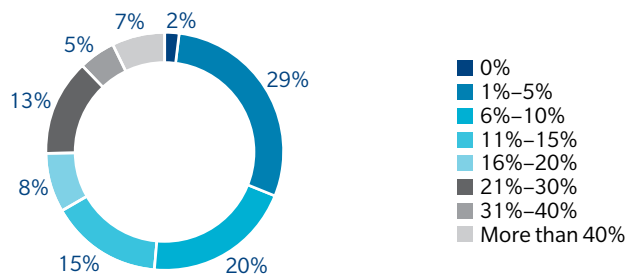
Exhibit 10: Percentage of top 100 senior roles held by females

N=531



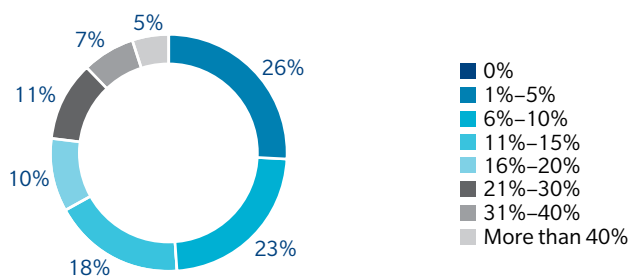
For organizations with a formal leadership development strategy, women hold more – but only slightly more – top leadership roles. A greater percentage of these organizations have females in 11%-20% of their 100 most senior roles: 23% as compared with 20% for all respondents. However, a slightly smaller percentage of these companies (25%) have female leaders in over 20% of their top roles as compared to all respondents (27%). (See Exhibit 11.)

Exhibit 11: Percentage of top 100 senior roles held by females in companies with a defined leadership development strategy



Companies with a leadership development strategy that specifically addresses female leaders as a unique segment of the leadership pipeline have more women in top leadership roles – but not that much more. While a smaller percentage of these organizations concentrate women leaders in 5% or less of senior roles (26% of these organizations compared with 37% of all respondents), the shift is accounted for entirely by the greater percentage of women leaders in 6%-20% of all top roles (51% compared with 37% of all respondents). In fact, the percentage of female leaders in over 30% of top roles is smaller for organizations with leadership strategies that address female leaders as a unique segment than for all organizations surveyed (12% compared with 14%). (See Exhibit 12.) This may indicate a disconnect between strategy and implementation around this topic or may simply reflect the fact that companies with fewer female leaders at the top are attempting to address this shortfall in their leadership development strategies.

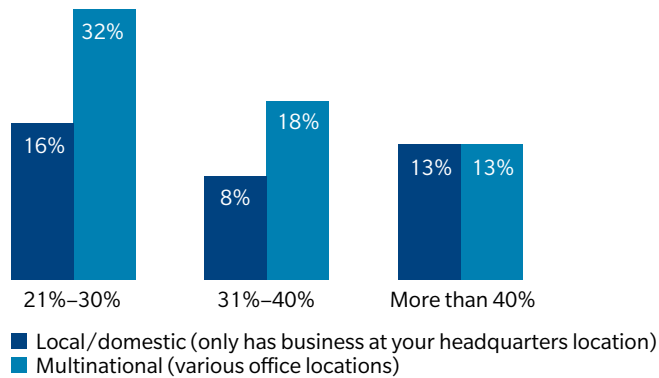
Exhibit 12: Percentage of top 100 senior roles held by females in companies with a defined leadership strategy that addresses female leaders as an important segment



The type of organization clearly matters when it comes to the percentage of senior roles held by women leaders. Among organizations in which female leaders hold over 20% of senior roles, almost twice as many (63%) are multinational companies as are local or domestic ones (37%). However, a similarly small percentage of multinational and domestic companies have women in more than 40% of their top 100 senior leadership roles. (See Exhibit 13.)

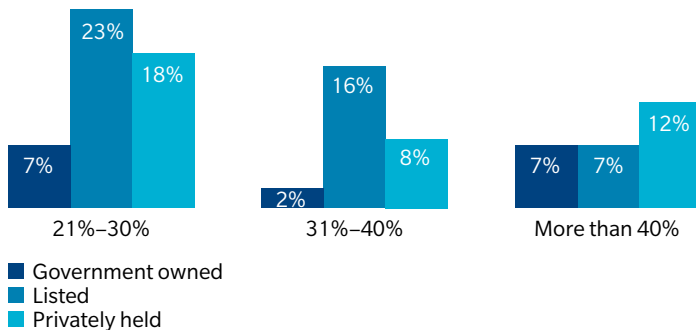
Exhibit 13: Percentage of senior leadership roles held by women by organization type

N=141



The organization’s ownership also has an impact on the percentage of senior roles held by women leaders. While it is much more likely for women to hold 21%-40% of senior leadership positions in listed and privately held companies than in government owned organizations, privately held companies are most likely to have women in more than 40% of senior roles. (See Exhibit 14.)

Exhibit 14: Percentage of senior leadership roles held by women by ownership type

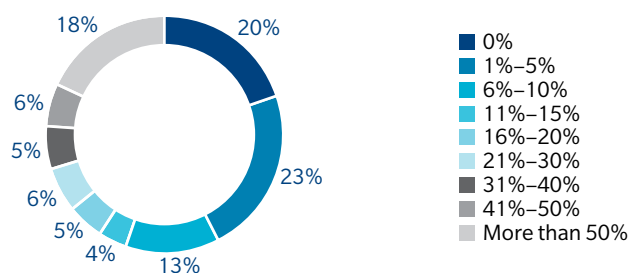


Expatriates and the localization of top roles

Localizing top leadership roles remains a significant challenge for companies in Asia Pacific. While 20% of organizations surveyed report that locals hold all of their top 10 most senior roles, 29% report that expatriates hold more than 30% of these top roles and 18% report that more than 50% of top roles are held by expatriates. (See Exhibit 15.)

Exhibit 15: Percentage of top 10 senior roles held by expatriates

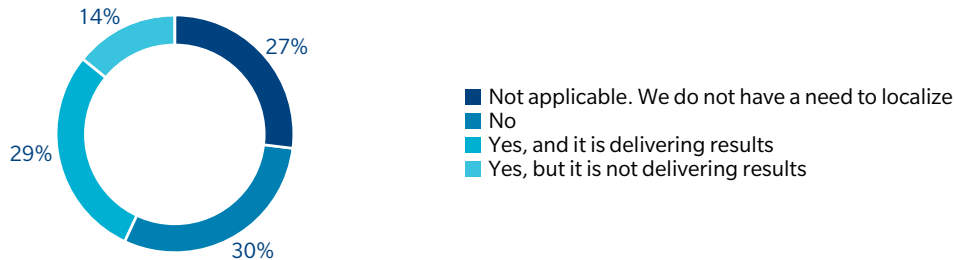
N=528



Eighty percent of organizations surveyed have expatriates in top leadership roles. For companies with localization strategy in place, 29% report that it is delivering results and 14% report that it is not delivering results.

Exhibit 16: Percentage of companies with a localization strategy in place to replace expatriates with local leaders

N=529



LOCALIZING LEADERSHIP THROUGH DEVELOPMENT EFFORTS

Thai Yamaha Motors (TYM) faced significant challenges during its transformation from a private Thai firm to a subsidiary of Yamaha Motors of Japan. Top managers were able to keep up with dynamic changes and were quite strong on implementation. However, frontline managers, while adept at day-to-day operational tasks, did not have the leadership mindset necessary to motivate and lead their subordinates and keep up with the pace of change.

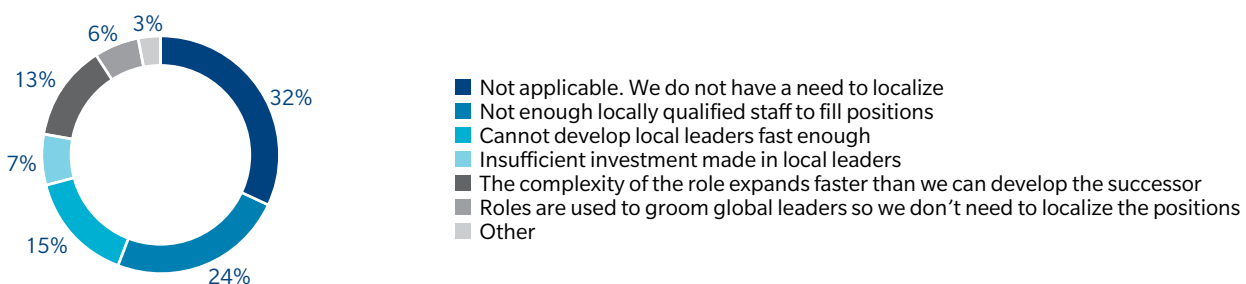
In response, TYM sent operational managers, especially those in production, to Japan for one-year rotations to give them both technical training from experts and more exposure to the parent company’s corporate culture. The company also implemented tools for assessing its managers’ leadership skills and their performance, including 360-degree evaluations, Management By Objectives (MBO), and mid-term plans. A one-on-one coaching system was constructed to groom the younger generation and prepare them to become future leaders.

These efforts have enabled TYM to successfully develop its frontline managers over the past decade as demonstrated by the fact that Thai employees have now replaced Japanese staff in many areas of the company including finance, human resources and production. Today, there are as many Thai as Japanese staff at TYM.

When asked about the biggest challenges to localization, a quarter (24%) say it is the lack of local staff qualified to fill positions. Development is clearly one necessary input to the localization process. (See Exhibit 17.)

The speed of growth in Asia Pacific also creates barriers to localization: 15% of companies say they cannot develop local leaders fast enough and 13% say the complexity of the role expands faster than they can develop successors. The problem is not a lack of investment; only 7% of companies cite insufficient investment in local leaders as a barrier to localization. (See Exhibit 17.)

Exhibit 17: Single biggest challenge when attempting to localize leadership



LEADERSHIP ASSESSMENT

COMMONLY USED ASSESSMENT TOOLS

The methods that companies use to assess the leadership capability of their leaders do not vary substantially based on the leader's level in the organization. For all leadership levels, the three most commonly used assessment tools are competency assessments (45%), 360-degree feedback (45%), and career achievement records (43%). If organizations are serious about building a deep and sustainable pipeline of leaders, more rigor is needed to assess for long range contribution and potential. Assessing for 'leadership potential' or 'readiness to take a more senior role' is one of the greatest needs in Asia Pacific, yet the methodologies that are being deployed focus on current performance or capability. This use of historical assessment techniques, such as career achievement records, 360 assessment surveys and behavioral based interviews works well in mature markets where the next role is likely to be similar to previous (here past performance is a good predictor). However, in Asia Pacific where there is rapid promotion and career advancement, this may not hold true, especially at lower levels in the organization.

360-degree feedback is particularly common in assessing senior level leaders – 61% of respondents use this tool to assess leaders at this level. (See Exhibit 19.) By contrast, 49% use 360-degree feedback to assess middle level leaders (see Exhibit 20), 45% to assess global leaders (see Exhibit 18) and only 35% to assess frontline leaders (see Exhibit 21).

Career achievement records are used by a relatively stable percentage of companies to assess all leadership levels – from 41% of companies to assess frontline leaders (see Exhibit 21) to 48% of companies to assess senior level leaders (see Exhibit 19).

ASSESSMENT TRUTHS

- Every assessment approach has strengths and limitations
- Multiple and/or combined approaches provide better quality of information for decision making
- Reliability and validity are critical measures of any assessment approach and need to be considered when selecting a portfolio of instruments
- All things being equal, combining multiple assessment approaches yielding overlapping information (convergent validity) is more accurate than a single approach
- There is a direct correlation between the quality of assessment and the resources invested (e.g., time, money, personnel)

ENHANCING PERFORMANCE BY CREATING ASSESSMENT TOOLS THAT REFLECT THE COMPANY'S LEADERSHIP MODEL

LG Innotek, a major IT components manufacturing company in Korea, needed a new leadership assessment system so it could select the right executives for the right roles. The first step was to establish a new executive leadership model based on business requirements. Based on this model, appropriate assessment tools were designed, and evaluation was implemented. Individual assessment reports were provided to participants and those results were used in other HR system. This process enhanced the overall level of competency in the company's executive talent pools. Given its success, the assessment process was expanded later to include the general manager level.

Exhibit 18: Methods used to assess global leaders

N=485



Exhibit 19: Methods used to assess senior level leaders

N=485



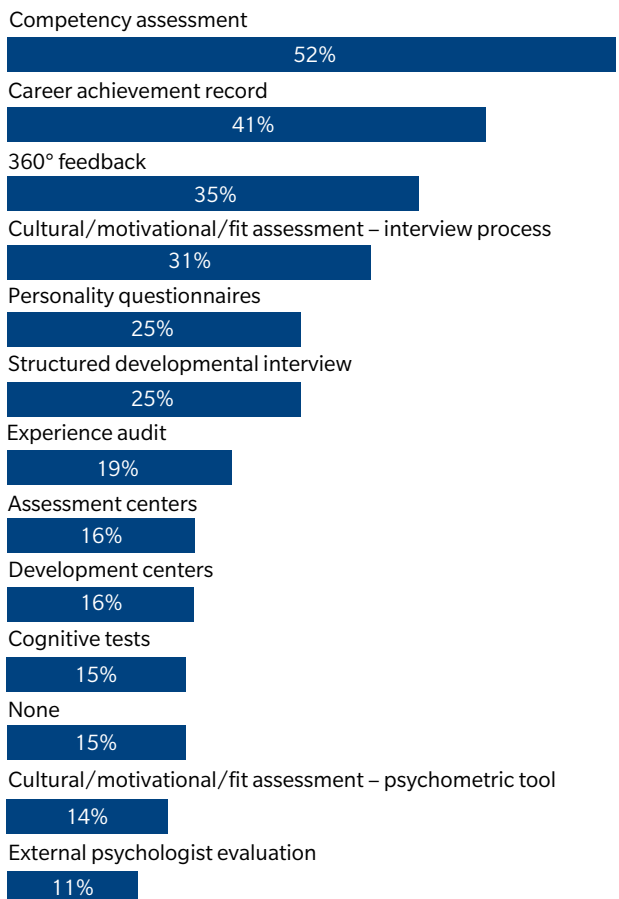
Exhibit 20: Methods used to assess middle level leaders

N=485



Exhibit 21: Methods used to assess frontline leaders

N=485

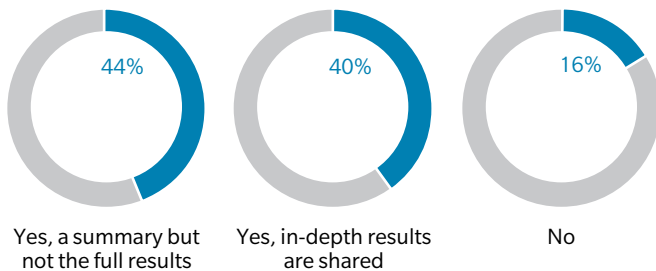


SHARING FEEDBACK

Organizations are doing a great job of providing feedback to individuals based on assessment results. Only 16% of companies say they do not share results as feedback. Two-fifths of companies share in-depth results, while another 44% share a summary of results. (See Exhibit 22.)

Exhibit 22: Assessment results are shared as feedback to individuals

N=481

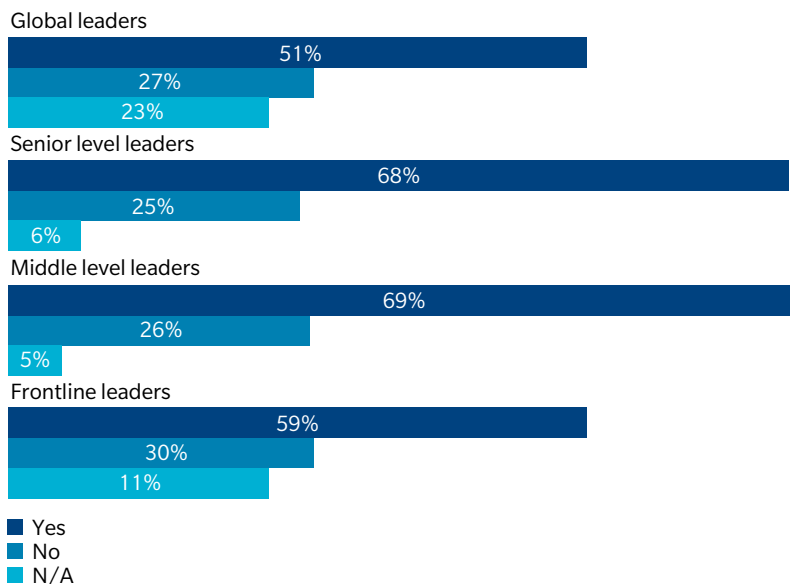


LINKING FEEDBACK TO DEVELOPMENT

Although a great majority of companies are sharing feedback from assessments with individual leaders, over a quarter are failing to link that feedback to leaders' individual development plans. At the same time, only half of companies (51%) say that they are linking assessments of their global leaders to individual development plans. (See Exhibit 23.)

Exhibit 23: Feedback from assessment is linked to individual's development plan

N=476



LINKING ASSESSMENT RESULTS TO INDIVIDUAL DEVELOPMENT PLANS (IDPs)

After creating leader profiles for three levels of leadership – strategic leaders, business leaders and frontline leaders – Suncorp Group took steps to implement the leader profiles and assess leaders against them. First, Suncorp ran a program called “removing the blockages,” in which internal coaches, ran sessions with leaders to talk through the leader profiles. Next, the group used multi-source (360-degree) feedback to assess leaders against the leader profiles. Going forward, leaders will be assessed against the profiles annually in conjunction with performance reviews. Results from the assessments will feed into annually refreshed individual development plans.

LEADERSHIP DEVELOPMENT

METHODS AND EFFECTIVENESS

The most popular development programs used by companies in Asia Pacific include classroom training (used by 87% of companies), individual development plans (used by 76% of companies) and challenging development opportunities (or “stretch” assignments, used by 71% of companies). (See Exhibit 24.)

While one of these – challenging development opportunities – is also rated as the most effective means of developing leaders (48% of respondents rate it “very effective”), classroom training and individual development plans (IDPs) are seen as only moderately effective. In fact, a greater percentage of companies rated IDPs as “not effective” than any other development program with the exception of e-learning programs. This may be related to the fact that so many companies fail to link feedback from assessments to IDPs, thereby diminishing their potential relevance and impact. (See Exhibit 25.)

Interestingly, many other development methods are seen as at least as or more effective than classroom training and IDPs, yet are used much less frequently, including action learning programs (seen as effective by 84% of companies), mentoring (seen as effective by 83%), leadership coaching by internal (83%) or external (80%) coaches and defined career paths for developing leaders (seen as effective by 80% of companies, yet currently in use by only 48%). (See Exhibits 24 & 25.)

Moreover, although companies rate overseas assignments and rotational experiences as “very effective” behind only challenging development opportunities, these methods are employed by only 62% and 60% of companies, respectively. (See Exhibits 24 & 25.)

A FOCUS ON DEVELOPMENT

CLP Holdings Ltd., one of the largest investor-owned power businesses in Asia Pacific, is in a precarious talent situation. Forty percent of its senior management plans to retire in the next five years. At the same time, the company places significant value on grooming talent from within, talent that intimately understands its specialized business.

To meet this challenge, CLP subscribes to the “70-20-10” development philosophy, with 70% learning on the job, 20% learning from mentoring and coaching, and 10% from formal training programs. Thus the organization has implemented a strong mobility program for employees in Hong Kong, giving them stretch assignments overseas to expedite their learning and expose them to an international landscape.

CLP also offers training programs for talent at different levels and stages of their careers. Early and mid-career high-potential talent attend training courses hosted by a top-notch business school in Hong Kong, whereas high-potential middle to senior leaders attend a custom-designed Group Executive Development Program (GEDP) through another prominent international business school. Finally, executives have individualized programs tailored to their development needs.

Exhibit 24: Development programs currently in use by respondents

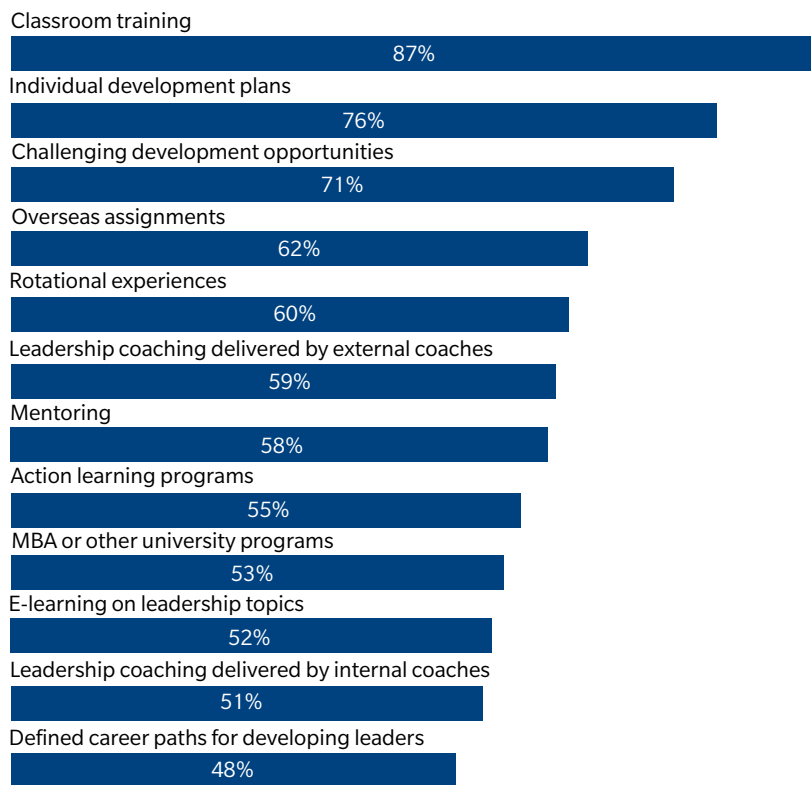


Exhibit 25: Effectiveness of development programs

	USE		EFFECTIVENESS			
	Do not use	Currently in use	Very effective	Moderately effective	Not effective	Neutral
Action learning programs	45%	55%	27%	57%	4%	11%
Challenging development opportunities ("stretch assignments")	29%	71%	48%	42%	1%	8%
Classroom training	13%	87%	9%	73%	8%	10%
Defined career paths for developing leaders	52%	48%	23%	57%	7%	14%
Individualized development plans	24%	76%	19%	61%	10%	10%
Leadership coaching delivered by external coaches	41%	59%	30%	50%	7%	13%
Leadership coaching delivered by internal coaches	49%	51%	25%	58%	6%	12%
MBA or other University programs	47%	53%	14%	65%	7%	14%
Mentoring	42%	58%	22%	61%	8%	9%
Overseas assignments	38%	62%	42%	43%	3%	11%
Rotational experiences	40%	60%	39%	46%	2%	13%
E-learning on leadership topics	48%	52%	10%	61%	22%	7%

SPENDING ON TRAINING AND DEVELOPMENT

Most companies in Asia Pacific are not spending enough on the training and development of their leaders, even for higher-level leaders. While almost a third of companies (32%) spend more than USD5,000 per person per year to train and develop their senior level and global leaders, almost half (47%) spend less than USD3,000 per year, and a fifth (21%) spend less than USD1,000 per person per year. (See Exhibit 26.)

Companies spend even less annually per person training and developing middle level and frontline leaders than they do global and senior level leaders. To develop their middle level leaders, 20% of companies spend less than USD500 per person per year and almost three-quarters (74%) spend less than USD3,000. Even less is spent on frontline leaders, with 38% of companies spending less than USD500 per person per year and 87% spending less than USD3,000. (See Exhibit 26.)

What's interesting about this finding is that, while only 29% of organizations cite insufficient funds for development as a barrier to achieving their development goals (see Exhibit 4), organizations in Asia Pacific are not spending nearly as much on leadership development as those in the U.S. According to Bersin & Associates, a US-based enterprise learning and talent management research and advisory services firm, U.S. companies with mature leadership development programs spend approximately USD12,400 per person on leadership development annually. Bersin also reports that companies are spending increasing amounts to develop high potentials – about USD7,100 per person on this critical talent segment.⁵

ACCELERATING THE DEVELOPMENT OF HIGH POTENTIALS

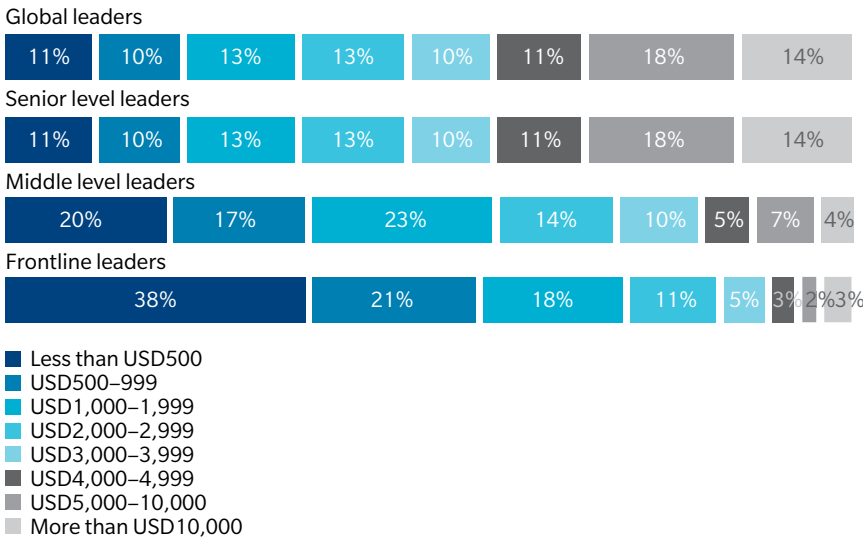
With the transformation of the telecommunications industry, SingTel, a Singaporean telecommunications company, needed to create a faster and more agile approach to leadership development. HR implemented a number of new programs in conjunction with the businesses that have improved its ability to identify high potentials and enabled it to begin their development much earlier in their careers. Its Fast Track approach is an accelerated program that dispenses with the traditional belief that an employee needs to be in a specific role for a period of time before he or she can move up or be considered for a development program.

“Talent management needs to be led by the businesses and supported by HR,” says Cara Reil, Vice President, Talent Management & Development, SingTel. “If talent management is driven purely by HR processes, then it is only administrative. You need to develop your business leaders and train them to identify high potentials, take risks, and be open to letting talent move on to other roles.”

⁵ Leadership Development Factbook® 2012, Bersin & Associates / Karen O'Leonard and Laci Loew, July 2012.

Exhibit 26: Annual spending per person on training and development

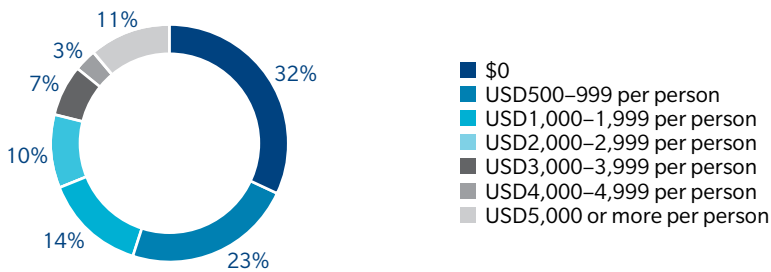
N=456H



Most organizations in Asia Pacific are not spending a great deal on external coaches to support the development of current and future leaders. A third of respondents (32%) spend nothing on external coaches, while another 37% spend USD500-USD1,999 per person per year. Only a third of organizations (31%) are spending USD2,000 or more per leader annually on coaching, and only 11% of organizations are spending USD5,000 or more per leader. (See Exhibit 27.)

Exhibit 27: Annual spending per person on external coaches

N=431

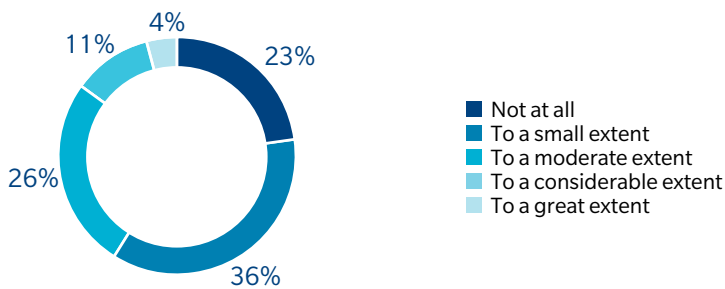


LINE MANAGER ACCOUNTABILITY FOR DEVELOPING FUTURE LEADERS

Despite their recognition of the need to do a better job of developing leaders, organizations in Asia Pacific are not holding their line managers accountable for developing future leaders to any large degree. Almost a quarter (23%) of companies do not hold line managers accountable at all – either through Key Performance Indicators (KPIs) assigned in line managers’ annual goals or through a bonus tied to metrics around grooming leaders. Over a third (36%) only hold line managers accountable to a small extent. Only 15% of organizations are holding their line managers accountable for developing future leaders to a considerable or great extent. (See Exhibit 28.)

Exhibit 28: Line manager accountability for developing future leaders

N=442

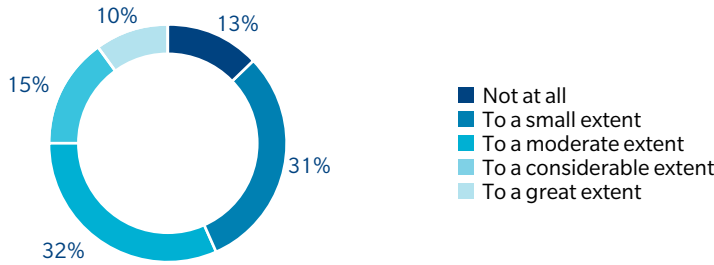


“It is critical that managers take responsibility for supporting and developing their staff’s growth. Their involvement in coaching and mentoring and, finally, in facilitating the learning process for employees, will enable and impact the growth of employees tremendously.” – Maria Chan, Regional Learning and Development Manager, HR & Admin, VF Asia Ltd.

Those companies that regularly conduct leadership pipeline projections to determine how many leaders they will need in the future do tend to hold line managers more accountable for developing those leaders. Among these companies, a quarter (25%) hold line managers accountable to a considerable or great extent and another 31% hold line managers accountable to a small extent. Still, though, 13% of companies that conduct leadership pipeline projections do not hold line managers accountable for developing future leaders at all. (See Exhibit 29.)

Exhibit 29: Line manager accountability for developing future leaders among companies that regularly conduct leadership pipeline projections

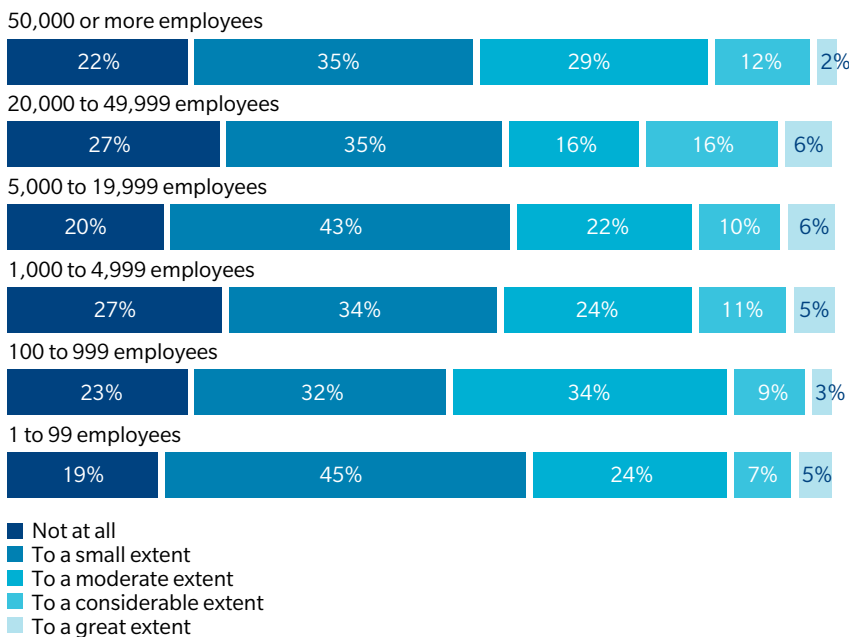
N=168



Organization size does not seem to significantly impact the degree to which line managers are held accountable for developing future leaders. Among companies surveyed, those most likely to hold line managers accountable for developing leaders, at least to a small extent, are those with 1-99 employees and those with 5,000-19,999 employees. Those companies most likely to hold line managers accountable to a moderate, considerable or great extent include those with 100-999 employees and those with 50,000 or more employees. Companies with 20,000-49,999 are the most likely to hold line managers accountable to a considerable or great extent (22% compared with 15% of companies overall), but these companies are also among the most likely not to hold managers accountable at all (27% compared with 23% for all companies). (See Exhibit 30.)

Exhibit 30: Line manager accountability for developing future leaders by organization size

N=442

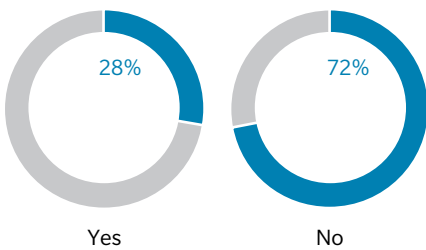


DEVELOPING FEMALE LEADERS

Few companies in Asia Pacific have a defined diversity strategy for developing female leaders. Among respondents, only 28% report that they do have such a strategy. (See Exhibit 31.) Moreover, the existence of a strategy does not mean the company will have significantly more female leaders than those without a defined diversity strategy. While companies with a diversity strategy are more likely to have females in 11-15% of their top 100 most senior roles than are companies without a diversity strategy, they are actually slightly less likely to have female leaders in more than 15% of senior leadership roles. (See Exhibits 32 & 33.) Of course, this may indicate that those companies with the fewest female leaders are the ones most likely to develop a diversity strategy in order to move more females into leadership roles. Over time, this may result in a larger number of women among organizations' top 100 leaders.

Exhibit 31: Defined diversity strategy in place for developing female leaders

N=449



“Suncorp is currently piloting a high potential program for women business leaders who were identified in succession planning, as well as a high performing women program focused on career resiliency.” – Jane Keating, Executive Manager, Leadership and Culture, HR, Suncorp Group

Exhibit 32: Percentage of top 100 senior roles held by females in companies with a defined diversity strategy for developing female leaders

N=127

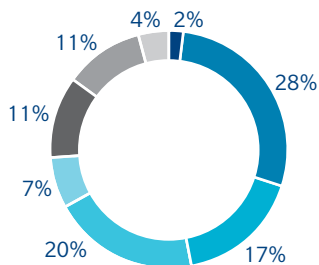
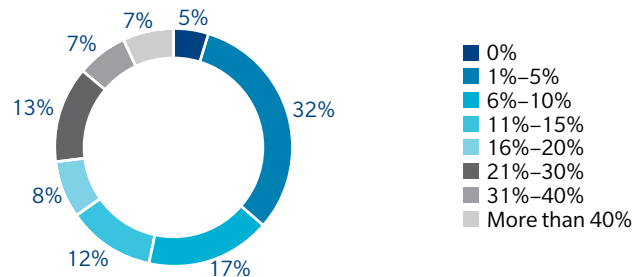


Exhibit 33: Percentage of top 100 senior roles held by females

N=531



Barriers to female leadership

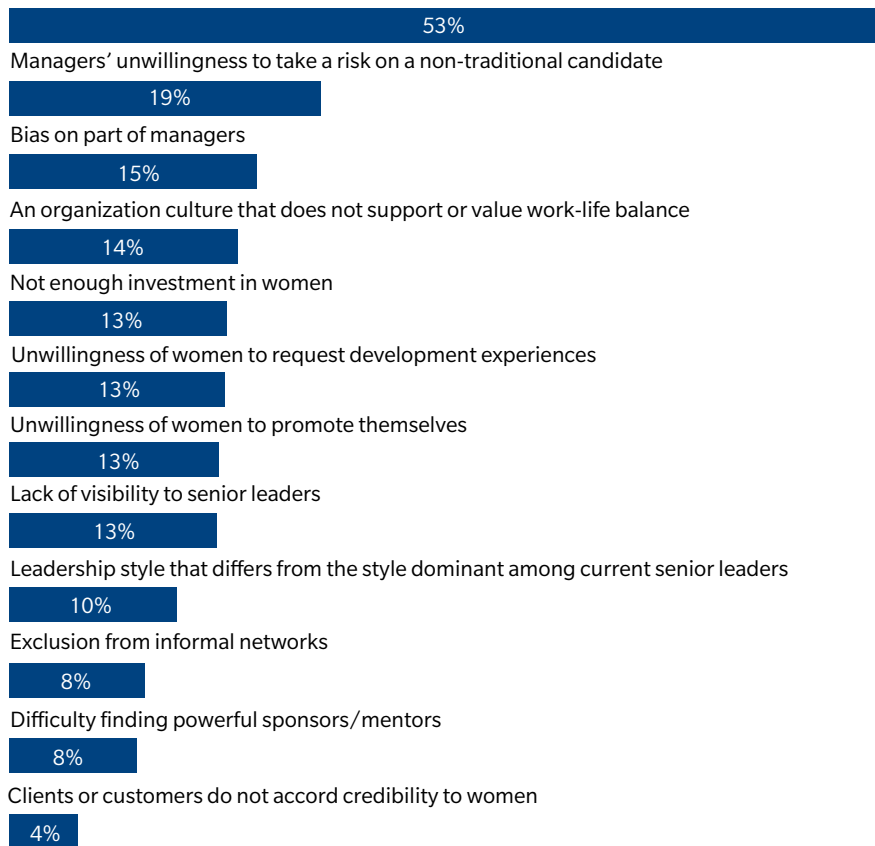
Over a third of companies (34%) blame managers for preventing women from advancing, either because they are unwilling to take a risk on a non-traditional candidate (19%) or simply because they are biased (15%). (See Exhibit 34.)

Other barriers to female advancement cited include: an organizational culture that does not support or value work-life balance (14%), the lack of sufficient investment in women (13%), the unwillingness of women to request development experiences (13%), the unwillingness of women to promote themselves (13%), and the lack of visibility to senior leaders (13%). (See Exhibit 34.)

Exhibit 34: Barriers responsible for keeping women from advancing to senior leadership positions

N=456

We do not have any barriers that keep women from advancing to senior leadership positions



Surprisingly, half of all companies surveyed (53%) report that they have no barriers preventing women from advancing to senior leadership positions. (See Exhibit 34.) Presumably, these companies would have more women among their senior leaders – and they do. Of the 242 companies without barriers to female advancement, more have females in 21% or more of their top 100 most senior roles and fewer have females in only 0-20% of their top roles than do surveyed companies overall. (See Exhibits 35 & 36.) Yet even among these companies, almost half (46%) report that only 10% or less of senior positions are held by women. (See Exhibit 35.) Given this lack of female representation, it seems that barriers to advancement do exist, even within companies that do not explicitly acknowledge these barriers.

It is interesting to note the difference in responses to this survey compared with a global survey conducted in 2009 by diversity and inclusion professionals entitled Talent Management Processes for a Diverse Leadership Team. The majority of respondents to that survey cited exclusion from informal networks (63%) and different leadership styles (54%) as significant barriers to women’s penetration of the upper ranks in the organization. Forty-two percent said women’s lack of visibility to senior leaders is a factor. Bias among managers was cited by only 28% of organizations.⁶

Exhibit 35: Percentage of top 100 senior roles held by females in companies that report no barriers to female leadership

N=242

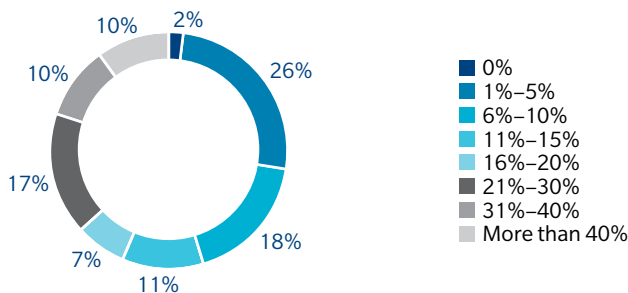
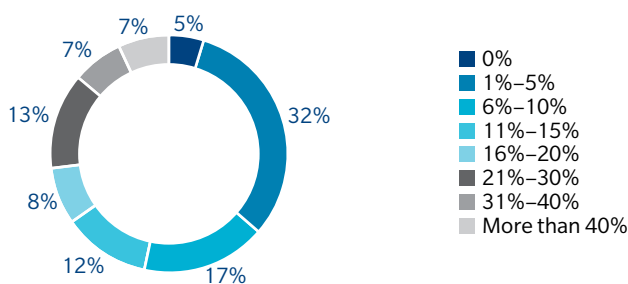


Exhibit 36: Percentage of top 100 senior roles held by females

N=531



⁶ Talent Management Processes for a Diverse Leadership Team, a study conducted by ORC Worldwide Global Equality, Diversity and Inclusion Practice, now Mercer, for Industrial Relations Counselors, Inc., 2009

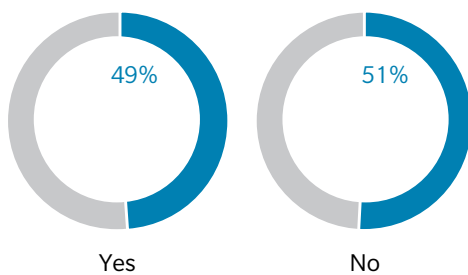
PERFORMANCE/SUCCESSION

IDENTIFYING LEADERS READY FOR THE NEXT MOVE

Companies in Asia Pacific are evenly split between those who say their performance management process effectively identifies who is ready for the next move or position within their leadership pipeline (49%) and those who say it does not (51%). (See Exhibit 37.) Appropriately developing future leaders and putting the right leaders into the right roles at the right time is hindered when companies are unable to identify who is ready to move up the leadership pipeline.

Exhibit 37: Performance management process identifies leaders ready for next move

N=432



ASSESSING READINESS FOR PROMOTION

Jardines Matheson Holdings, one of the largest Asia-based conglomerates, uses its Development Center, established in 1988, to assess participants against Jardines' '5Ps' competencies (Purpose, People, Personal Profile, Process & Systems Thinking and Performance). Over one-and-a-half days, participants take part in a scenario exercise and group meeting, engage in a management interview, present a business analysis, respond and manage critical incidents, complete aptitude tests and, finally, evaluate their own performance. The Development Center experience is often followed by a one-and-a-half-day workshop focused on future development.

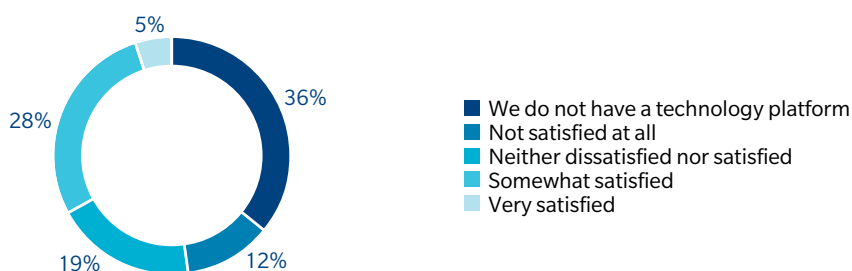
Individuals' results are used to develop promotability ratings, which are shared with them and with their managers. Jardines policy is to promote candidates with 80% readiness, a calculated risk that empowers employees to challenge themselves, with the support of management, and to grow on the job.

Technology for managing performance

Technology may be part of the problem. A third of companies (31%) are not satisfied or are indifferent to the technology platform they use to manage performance. Only 5% of companies are very satisfied with the technology platform they use for this purpose, while over a third (36%) have no technology platform. (See Exhibit 38.)

Exhibit 38: Satisfaction with technology platform used to manage performance

N=412

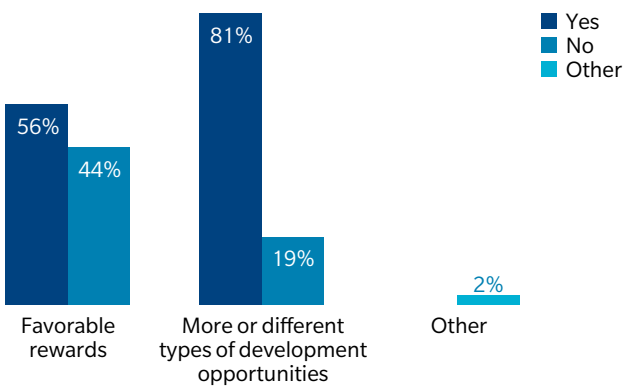


DIFFERENTIATED OPPORTUNITIES AND REWARDS FOR CRITICAL OR HIGH POTENTIAL FUTURE LEADERS

While companies in Asia Pacific could be doing a better job of identifying leaders ready for their next move, they are successfully providing differentiated development support or rewards to individuals identified as critical or high potential future leaders. Four-fifths (81%) of companies give these individuals more or different development opportunities, while over half (56%) give them favorable rewards. (See Exhibit 39.)

Exhibit 39: Extras provided to individuals identified as critical or high potential future leaders

N=441



SUCCESSION PLANNING AND IDENTIFYING SUCCESSORS

Almost two-thirds of organizations (63%) say they have succession plans in place at least for their top tier leaders such as the CEO and other senior executives. (See Exhibit 40.) At the same time, only 15% of companies say they have strong, “ready-now” successors for every critical role in the leadership pipeline to a considerable or strong extent and 51% say they have such successors only to a small extent or not at all. (See Exhibit 41.)

Exhibit 40: Succession plans in place for top tier leaders

N=441

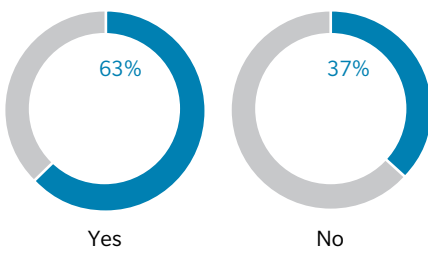
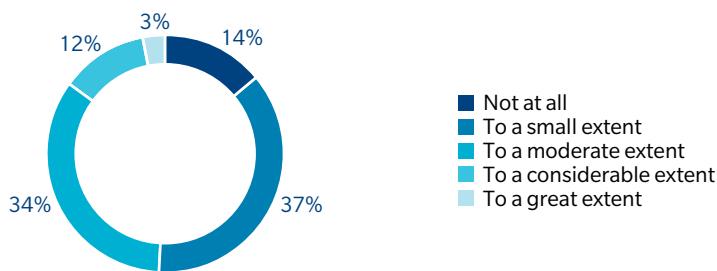


Exhibit 41: Strong, “ready-now” internal successors for all critical leadership roles

N=426



SUCCESSION PLANNING AT BANPU

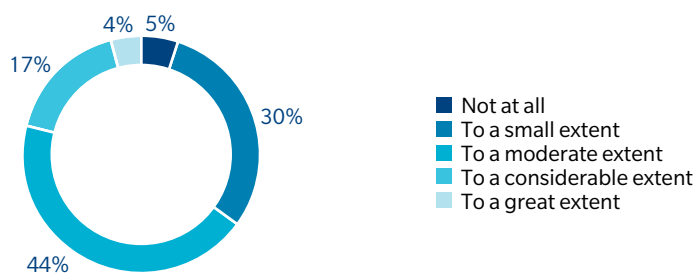
Succession planning is a key issue for Banpu Public Company Limited, a pan-Asian coal-focused energy group and the third largest company in Thailand. Much of the company’s senior management will retire in the next few years, requiring it to find successors for critical positions. Moreover, the current skills gap between vice presidents and managers is significant.

To tackle this issue, Banpu appointed a Succession Plan Committee charged with identifying successors. First, the committee identifies candidates by assessing individuals on a number of factors related to leadership potential and comparing the results with required competencies. The committee then creates individual development plans designed to prepare these candidates for their future positions.

Having a succession plan does correlate with having identified successors for critical roles – but does not guarantee it. Even among companies with succession plans in place, only 21% say they have strong, “ready-now” successors for every critical role in the leadership pipeline to a considerable or great extent, while 35% say they have such successors only to a small extent or not at all. (See Exhibit 42.)

Exhibit 42: Strong, “ready-now” internal successors for all critical leadership roles for companies with succession plans in place

N=266



“It was critically important for us to establish the business case as to why changes in our succession practices are important for line managers and executives. We needed to make the link between succession and the business strategy; we showed the impact of losing talent for three months on the flight of customers and the loss of revenue. Once we made this connection, we really got the support needed to change behaviors.” – A global financial services company

Technology for succession planning

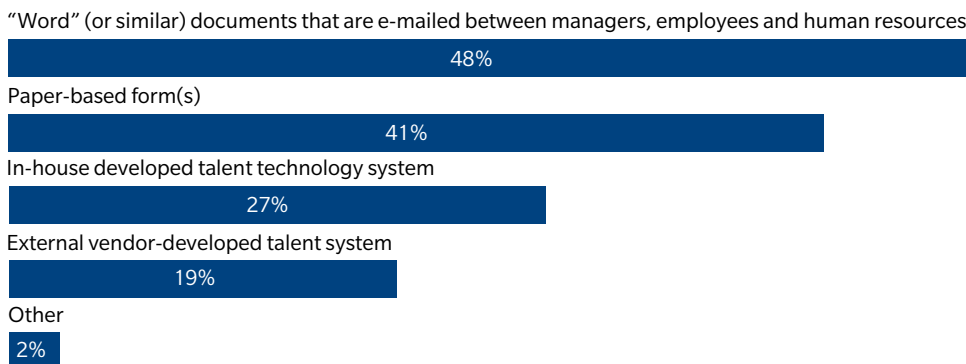
A major barrier to succession planning and execution for organizations in Asia Pacific may be the lack of the type of robust technology needed to enable this complex talent management process. First, companies in Asia Pacific continue to rely on fairly outdated and inefficient technology to manage their talent management processes. The most common way companies enable and track the execution of their talent management processes is to use “Word” or other similar documents emailed between managers, employees and HR (used by 48% of companies). In addition, over two-fifths (41%) of companies are currently enabling these processes through the use of paper-based forms. (See Exhibit 43.)

Overall, less than half of companies (46%) are using talent technology systems to execute their talent management processes. A little more than a quarter (27%) of companies use talent technology systems developed in-house and a fifth (19%) use external vendor-developed talent systems. (See Exhibit 43.)

“Previously our succession planning process relied on Excel spreadsheets. Upgrading to a global platform was important in enabling us to deliver a global view of talent. Last year, we had 70% succession plan fulfillment, a huge gain over the 6% fulfillment achieved two years earlier.” – A global financial services company

Exhibit 43: Method for tracking execution of talent management processes

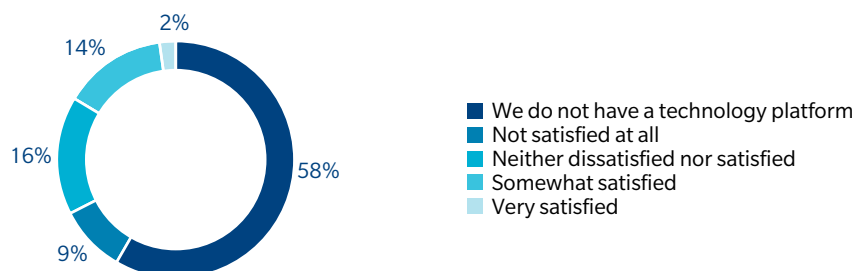
N=438



Second, a majority of companies (58%) report that they have no technology platform to manage succession specifically. Another quarter (25%) are not satisfied or are indifferent to the technology platform they use to manage succession, while only 16% are somewhat or very satisfied. (See Exhibit 44.)

Exhibit 44: Satisfaction with technology platform used to manage succession

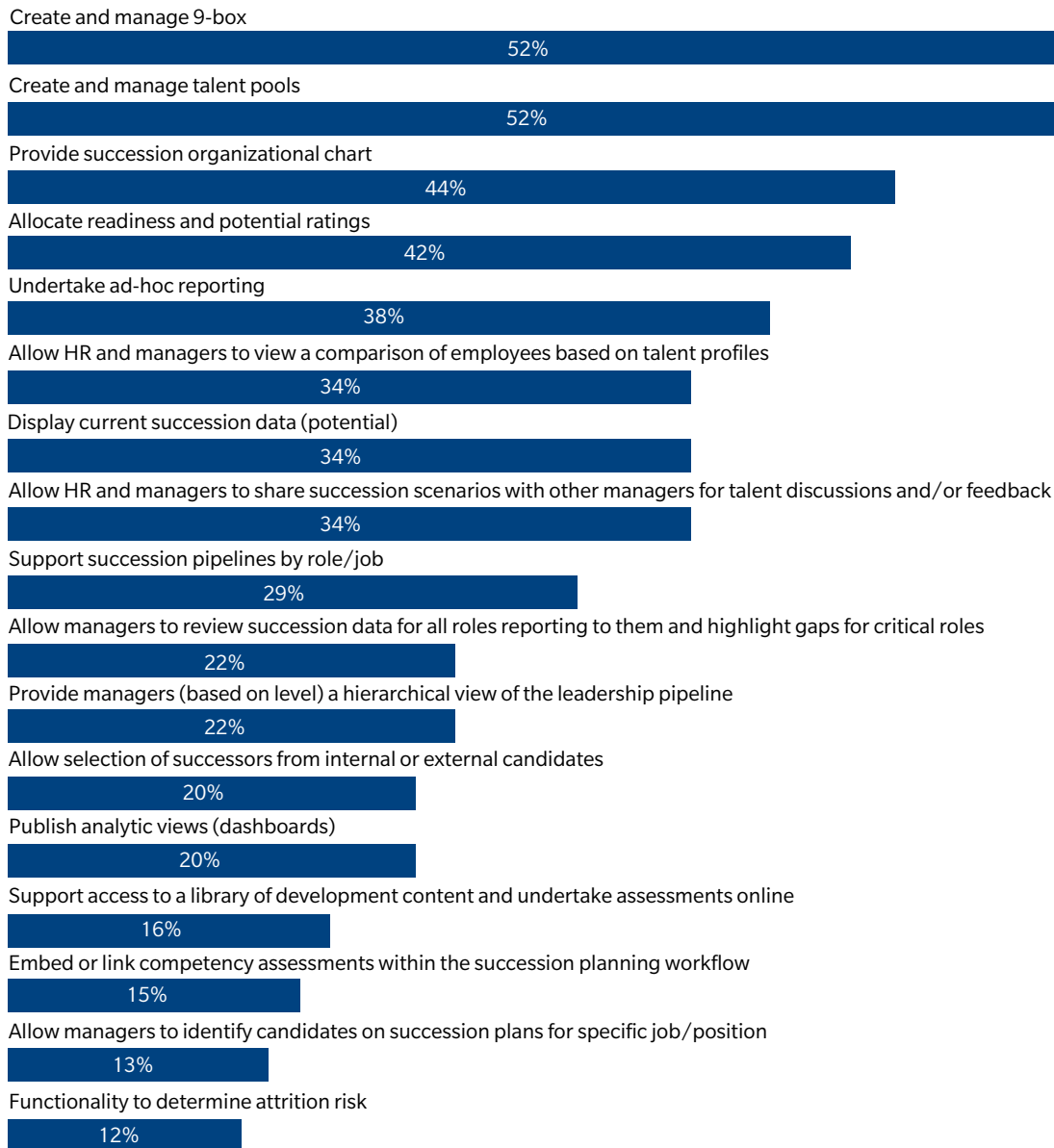
N=409



Preferences in succession management software

When choosing succession management software, organizations rank the ability to create and manage 9-box (52% of companies rank this feature among their top five desired features) and create and manage talent pools (52%) most highly. Other functionalities that organizations care about include: providing succession organizational chart (44%), allocating readiness and potential ratings (42%) and undertaking ad hoc reporting (38%). (See Exhibit 45.)

Exhibit 45: Top five features that are most important when selecting a succession management software solution



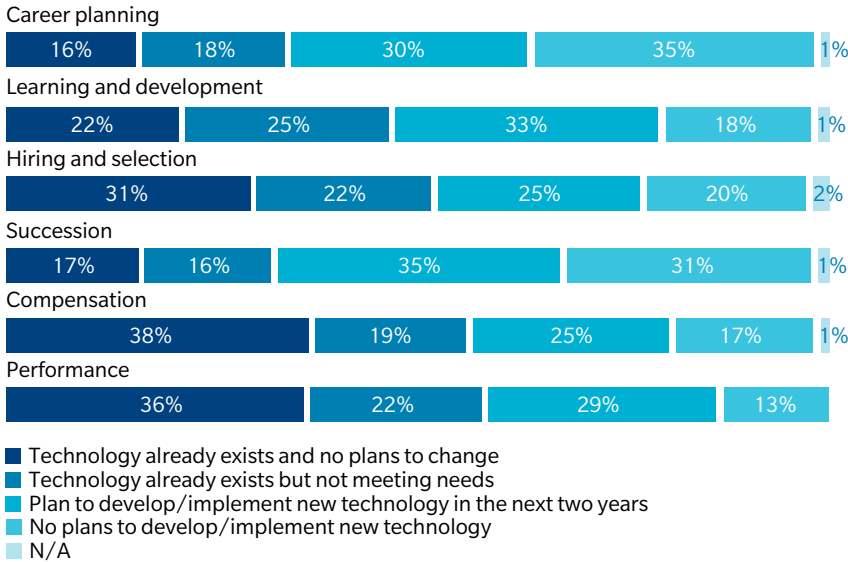
ORGANIZATIONS' TECHNOLOGY STATUS

Organizations are most satisfied with the technology they use for compensation, performance, and hiring and selection. For those processes, 38%, 36% and 31%, respectively, are satisfied with their current technology, while about a fifth (19%, 22% and 22%, respectively) find their current technology is not meeting their needs. Among these three processes, companies are slightly more likely to develop or implement new technology for performance processes within the next two years than for compensation or hiring and selection. (See Exhibit 46.)

Companies are least likely to have technology to support succession planning in place (only 17% of companies say they have the technology and no plans to change). Nonetheless, a large percentage also say they have no plans to develop or implement new technology for this purpose. (See Exhibit 46.)

Exhibit 46: Organizations' technology status

N=404



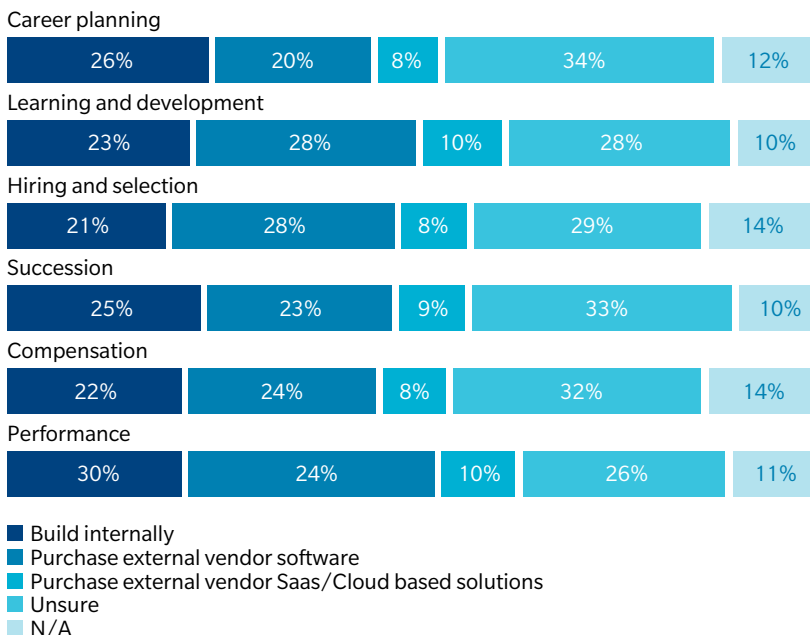
ENABLING LEADERSHIP DEVELOPMENT THROUGH TECHNOLOGY

Suncorp Group is leveraging IT to create an enterprise-wide learning management system. This system will support self-service development, offering online learning opportunities underpinned by the organization's leader profiles and capability framework.

Among companies planning to develop or implement new technology, between 21%-30% plan to develop their own, depending on the process, while 20%-28% plan to purchase external vendor software. Companies are most likely to purchase external vendor software for hiring and selection (28%) and learning and development (28%) processes. Companies are most likely to build their own solutions for performance (30%), career planning (26%) and succession (25%) processes. (See Exhibit 47.)

Exhibit 47: Method planned for developing/implementing new technology

N=351



DEVELOPING GLOBAL LEADERS

Based on insights gathered and published in *New Insights on Global Leadership Development* in 2011, Mercer identified the 20 most effective practices known to affect global leadership development. As part of this current study, we asked companies in Asia Pacific to report the extent to which they are demonstrating these effective practices when it comes to global leadership development.

The results indicate that organizations in Asia Pacific have some – but not all – of the infrastructure they need to effectively develop global leaders.

Among the good news is the fact that most companies (77%) have a function dedicated to global leadership talent, which plans and coordinates the moves of global talent. In addition, 80% of companies involve their top executives in the review and identification of global leadership talent pools – an indication of the seriousness with which many companies take this issue. (See Exhibit 48.)

While these dedicated global leadership functions are doing a good job of preparing global talent and their families for the personal challenges they will face in international assignments, they tend not to help with things to make the move easier for the entire family, like helping spouses find work or helping to locate housing and schools. (See Exhibit 48.)

While almost three-quarters of companies (72%) have established global talent pools and identify *people* for these pools, they are less likely to identify and track the *positions* that are considered good development opportunities or plan career paths to move global talent through increasingly complex global assignments. They are also failing to adequately plan for future leadership needs; only two-thirds (67%) say they undertake some type of leadership pipeline projection to determine how many global leaders will be needed in the next three to five years and 44% say they do so only partially. (See Exhibit 48.)

Only 48% of companies require at least one international experience before promotion into an executive position, and it is still relatively rare for organizations to use a global leadership capability model to help with talent development for global roles, a surprise given that results show many organizations use this same instrument for assessing global leaders. (See Exhibit 48.)

Another area of weakness for companies is the development and assessment of newly assigned global leaders. Forty-five percent do not offer new assignees mentors in their host countries and 57% fail to give new leaders feedback from their in-country colleagues – feedback that could be extremely valuable in helping them grow in the role. (See Exhibit 48.)

Finally, organizations are not working with their leadership pipelines early or deeply enough to ensure a bench of strong global leaders for the future. Thirty percent do not begin identifying candidates for global assignments at the manager level or regularly put selected manager-level employees on short term or long term international assignments. Another 50% do only partially. (See Exhibit 48.)

“Organizations are not working with their leadership pipelines early or deeply enough to ensure a bench of strong global leaders for the future.”

DEVELOPING GLOBAL LEADERS

Nitto Denko Corporation, based in Japan, is an innovation-oriented company with a business strategy based on leveraging proprietary technologies. The company's belief in the importance of deep technical and business understanding and networking to business success led it to open "Nitto University" in 2000, the first full-scale corporate university for leadership development in Japan.

Today, 70% of Nitto Denko's sales come from overseas markets and its geographic reach has expanded dramatically. This expansion is changing the type of knowledge needed by company leaders and has complicated the company's approach to leadership development.

To realign and accelerate leadership development, Nitto Denko has revamped its leadership development program. Nitto University, which had offered courses similar to those in MBA programs, has now become the "Nitto Global Business Academy," with a redesigned curriculum intended to give participants the skills to solve current business problems rather than academic ones.

The redesigned program is also helping leaders network outside their business and geographic area, benefits that the company believes will help it continue to generate the innovations critical to success.



Exhibit 48: Extent to which organizations demonstrate effective practices for developing global leaders

	Partially true	True	Not true	N/A
a) My organization has a centralized function that is dedicated to global leadership talent and expatriate assignments.	37%	40%	22%	1%
b) The centralized function effectively coordinates the identification, contracting, operational issues, and assessments of our global talent pools.	53%	23%	24%	1%
c) My organization effectively plans and coordinates the moves of global talent and ensures that after assignments they are transferred to rewarding roles in other parts of the globe or in their home countries or at the corporate center.	49%	25%	24%	2%
d) My organization effectively prepares global talent and their families for the personal challenges they will face in their international assignments.	49%	29%	21%	1%
e) My organization also assists with helping spouses find work opportunities as well as resources for schooling and housing.	48%	18%	33%	2%
f) We have established global talent pools that cascade down to the director level. We effectively identify talent for these global talent pools as well offer them consistent opportunities for development and promotion.	53%	19%	27%	1%
g) We have identified positions worldwide that are considered development opportunities for our global talent.	46%	17%	36%	1%
h) In the majority of cases, these jobs are reserved for our global talent pool.	41%	16%	42%	1%
i) These positions are actively tracked by our organization.	43%	20%	36%	2%
j) Our global talent jobs are built around a 'stepping stone' model where promotions lead to increasingly complex global assignments in scope and scale using the unique economic and political demands of individual countries and geographic regions as the parameters.	46%	16%	36%	2%
k) We have a global leadership capability model that is deployed to help with talent development. It is unique to global roles.	35%	21%	42%	2%
l) My organization has open job postings for international assignments. Any employee can identify themselves as candidates for these roles.	33%	31%	35%	2%
m) Global mobility is a significant challenge for our organization.	48%	27%	24%	1%
n) We start to identify candidates for global assignments at the manager level and regularly put selected manager level employees on short term or long term international assignments.	50%	19%	30%	1%
o) We require at least one international assignment before promotion into an executive position with the exception of certain specialized functions.	33%	15%	51%	2%
p) My organization offers newly assigned global leaders a host mentor in the countries to which they are assigned. This individual helps them in building local relationships, accelerating their knowledge, and in coaching them in cultural requirements.	44%	9%	45%	2%
q) Within the first year of their assignment to a new global leadership role, individuals receive a 360 feedback assessment from their in-country colleagues to assess their progress and effectiveness.	31%	11%	57%	1%
r) Sessions on our global markets and on cross-cultural leadership are offered in our executive education programs.	43%	18%	36%	3%
s) Our top executives are actively involved in reviews and identification of our global leadership talent pools.	52%	28%	18%	2%
t) We regularly undertake leadership pipeline projections to determine how many global leaders we will need in the next 3 to 5 years.	44%	23%	31%	3%

UNIQUE COMPETENCIES FOR ASIA PACIFIC LEADERS

Both globally and locally, HR professionals regularly request data and insight on the unique competencies required of leaders operating across Asia Pacific. To that end, this research sought to capture the competencies organizations think are critical to this region as well as the relative strength of each competency.

Using Mercer's Essential Leadership Competency Model, which represents the most advanced thinking and research on those skills and competencies necessary for effective leadership, companies in Asia Pacific indicated which competencies they view as critical to success in the region. The 16 competencies in the framework are organized into four categories: strategic, operational, people and personal.

Among these four categories, more companies place **strategic competencies** on their list of the top three critical competencies for leaders in Asia Pacific than any of the others, with three of the four strategic leadership competencies most likely to make the top-three list. Interestingly, the fourth strategic competency – “mental agility” – was chosen as a top three competency by only 8% of companies, placing it near the bottom of all 16 competencies in terms of importance. (See Exhibit 49.)

While one **operational competency** – “drives results” – is the fourth most-often cited competency in terms of its importance for Asia Pacific leaders, the next three most-often cited are all **people competencies**: “optimizes talent,” “coaches and develops others” and “drives performance” – indicating that at least some companies see the effective development and deployment of their people as critical responsibilities of current leadership. (See Exhibit 49.)

Nonetheless, the percentage of companies deeming these competencies critical remains quite low. Only 21% placed “optimizes talent” or “coaches and develops others” on the list of top three competencies, and only 17% placed “drives performance” in the top three. “Inspires others,” the fourth people competency, was chosen by only 12% of companies among the top three most critical leadership competencies. (See Exhibit 49.)

Finally, **personal competencies** – “cultural sensitivity,” “adaptability,” “courage,” and “learning ability” – are clustered near the bottom of the list of competencies chosen by companies as critical to leaders in Asia Pacific. (See Exhibit 49.)

INSTALLING LEADERSHIP COMPETENCIES NECESSARY FOR SUCCESS

Schaeffler Group has a three-tiered approach to leadership development in the Asia Pacific region, which is enabling the organization to both prepare today's leaders for the business and strategic challenges they face and build a strong pipeline of future leaders with the competencies necessary to step into leadership roles when needed.

The company's *senior management team* participates in two three-day modules designed to help improve strategic thinking and change ability. The two modules are held three months apart so that participants can work on an action-learning project in the interim. Recommendations from the projects are woven into the organization's strategic roadmap, which is then cascaded down to the rest of the organization.

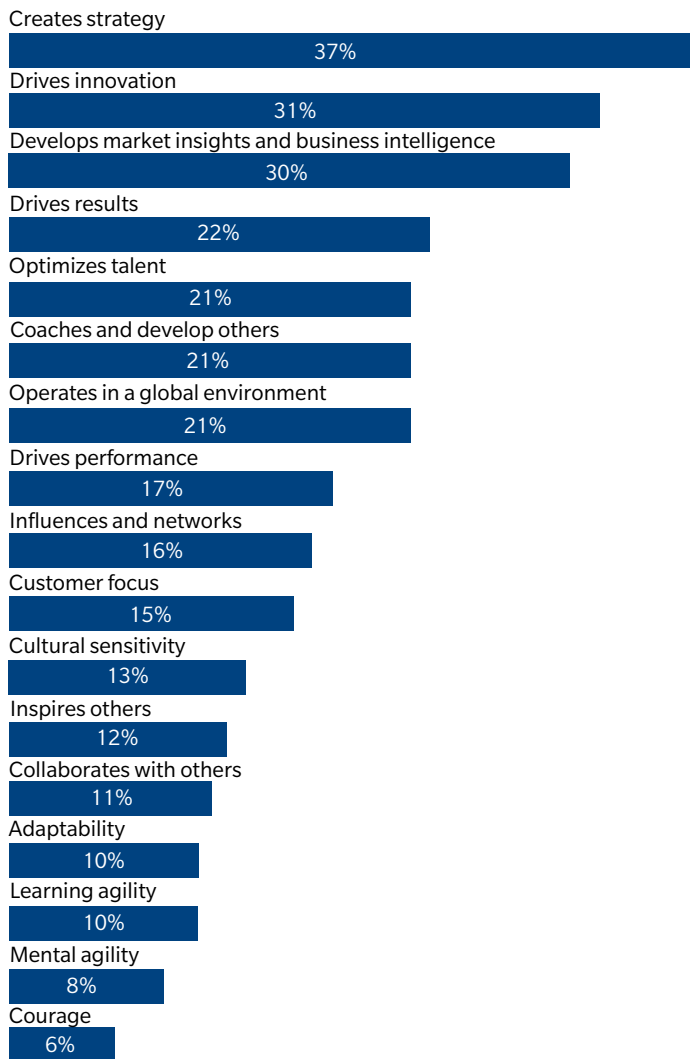
Schaeffler identifies *high potentials* in its leadership pipeline by using an assessment center to ascertain whether candidates have proficiency in three out of five important competencies identified by the company. Those who do participate in a management program with the business school, lasting two years and comprising six modules. Key performance indicators attached to this program help business managers and HR monitor the progress and achievements of high potentials.

Finally, the company's global Leadership Competence Program is used to develop talent who are not part of the high potential program for future leadership roles.

This approach to leadership development throughout the organization has produced beneficial behavioral and mindset changes in leaders. The company's senior management reports that it is seeing its leaders apply their learnings to strengthen their approach to leadership.

Exhibit 49: Competencies organizations think are critical for leaders in Asia Pacific

N=389



So, given these priorities, what competencies do leaders in Asia Pacific actually exhibit? Our survey asked companies to rate leadership effectiveness across these 16 competencies by leadership level: frontline, middle level, senior level and global leaders. This revealed that leaders at the global level have the greatest deficits in leadership competencies among all leadership levels. Conversely, effectiveness across all competencies is highest for frontline leaders. Presumably, as individuals move up the leadership pipeline and the demands of the roles increase, the development of leaders' capabilities in Asia Pacific is not keeping pace.

Strategic competencies

While over 80% of companies say their frontline, middle and senior level leaders have some degree of competency in the strategic realm, 23%-28% of companies say their global leaders have no competency in these areas. "Drives innovation" across multiple functions or an enterprise is a particular weakness of companies in Asia Pacific. Although this was the second most-commonly chosen competency identified by companies as critical to success (see Exhibit 49), 28% of companies say their global leaders have no competency in this area whatsoever. (See Exhibit 50).

Operational competencies

A greater percentage of companies report that their current leaders are effective across operational competencies as compared to strategic, people and personal competencies, with only 7%-13% of frontline, middle and senior level leaders lacking skills in this area. The percentages of those lacking skills climb to 14%-18% for global leaders. (See Exhibit 50.) “Drives results” – identified by companies as the fourth-most critical leadership competency – and “customer focus” – which only 15% of companies think is among the three most important leadership competencies (see Exhibit 49) – are particular bright spots for leaders. (See Exhibit 50.)

People competencies

Companies’ leaders are not quite as effective at managing their people as they are at strategic or operational tasks. The ability to optimize talent – ranked fifth by companies as a critical competency – is a particular weakness of leaders in Asia Pacific. However, “drives performance” is one of the greatest strengths of the region’s global leaders relative to all 16 competencies, one exhibited by over 80% of global leaders. (See Exhibit 50.) With employee engagement scores in the region dropping dramatically over the last seven years, organizations would benefit from more focus on improving people management skills.

BUILDING PEOPLE MANAGERS

The Managing People program at Sinclair Knight Merz is designed for middle managers, both current and potential. According to program literature, “People managers, at all levels, have a critical impact upon the people whom they supervise. A good manager will motivate and develop people. In addition, managers are seen to define the character of a company by their personal behaviors and conduct within the workplace and through the example that they personally set.”

The Managing People program is a three-and-a-half-day residential program delivered four times per year, rotating through key regions. Attendees range from team leaders to Section Managers (who may be responsible for up to 150 people). The program is experiential, enabling participants to experience the lifecycle of management. There is also a focus on building capability around how people work with clients. Participants work in syndicate and plenary groups and experience a range of client and team interactions through role-plays and discussions. The program concludes with syndicate groups making presentations to a “client.” A range of assessments is included in this program.

Personal competencies

Among the four competency types, leaders in Asia Pacific are least effective in exhibiting personal competencies. (See Exhibit 50.) This aligns with companies' rankings of the importance of various leadership competencies to success, with only 6%-13% of companies ranking these competencies among the top three critical for leaders in Asia Pacific. (See Exhibit 49.)

Exhibit 50: Extent to which leadership competencies exist within organizations in Asia Pacific

STRATEGIC	Does not exist today	Exists to a moderate extent today	Exists to a great extent today
Creates strategy			
Leading others (Understands strategy and aligns behavior)	11%	54%	35%
Leading managers (Translates strategy into actions)	9%	59%	31%
Leading a function or business (Creates and shares strategic vision)	13%	52%	34%
Leading multi-functions – enterprise (Redefines strategy)	23%	50%	26%
Drives innovation			
Leading others (Adopts new ideas)	16%	59%	23%
Leading managers (Creates new concepts)	17%	60%	21%
Leading a function or business (Encourages innovative ideas in others)	19%	56%	24%
Leading multi-functions – enterprise (Creates breakthrough ideas)	28%	52%	18%
Develops market insights and business intelligence			
Leading others (Gathers information)	12%	58%	28%
Leading managers (Researches the industry)	14%	58%	25%
Leading a function or business (Networks with industry experts)	13%	59%	26%
Leading multi-functions – enterprise (Demonstrates thought leadership)	26%	50%	20%
Mental agility			
Leading others (Analyzes data)	14%	55%	29%
Leading managers (Understands trends)	14%	56%	28%
Leading a function or business (Simplifies complex data)	14%	60%	24%
Leading multi-functions – enterprise (Creates new concepts)	23%	54%	19%

OPERATIONAL	Does not exist today	Exists to a moderate extent today	Exists to a great extent today
Drives results			
Leading others (Achieves results set by others)	9%	41%	47%
Leading managers (Improves performance)	7%	48%	41%
Leading a function or business (Persists despite obstacles)	10%	49%	39%
Leading multi-functions – enterprise (Takes personal and business risks)	18%	52%	26%
Customer focus			
Leading others (Responds to requests)	7%	43%	47%
Leading managers (Proactively forms relationships)	8%	44%	44%
Leading a function or business (Acts as a trusted advisor)	9%	49%	39%
Leading multi-functions – enterprise (Establishes and deep and broad relationships)	14%	51%	32%
Influences and networks			
Leading others (Convinces others through data)	11%	56%	30%
Leading managers (Adapts discussion to audience)	11%	59%	27%
Leading a function or business (Enlists support of others)	9%	60%	28%
Leading multi-functions – enterprise (Builds coalitions)	16%	55%	24%
Collaborates with others			
Leading others (Supports others)	10%	54%	32%
Leading managers (Improves group behavior)	10%	58%	29%
Leading a function or business (Removes barriers to collaboration)	13%	59%	25%
Leading multi-functions – enterprise (Acts as a role model of collaboration)	18%	54%	23%

PEOPLE	Does not exist today	Exists to a moderate extent today	Exists to a great extent today
Inspires others			
Leading others (Guides team)	9%	54%	33%
Leading managers (Motivates team)	11%	58%	27%
Leading a function or business (Orchestrates high performing teams)	15%	58%	23%
Leading multi-functions – enterprise (Inspires team)	20%	54%	22%
Coaches and develops others			
Leading others (Provides support)	12%	61%	24%
Leading managers (Provides feedback and coaching)	15%	62%	21%
Leading a function or business (Identifies training opportunities)	16%	60%	21%
Leading multi-functions – enterprise (Creates a developmental culture)	26%	51%	19%
Optimizes talent			
Leading others (Recruits candidates)	17%	52%	28%
Leading managers (Anticipates hiring needs)	21%	56%	21%
Leading a function or business (Takes systemic view of talent)	26%	58%	12%
Leading multi-functions – enterprise (Aligns talent needs with strategy)	28%	53%	14%
Drives performance			
Leading others (Provides direction)	9%	50%	38%
Leading managers (Provides candid feedback)	13%	54%	30%
Leading a function or business (Takes corrective action)	11%	53%	32%
Leading multi-functions – enterprise (Creates culture of performance)	15%	50%	31%

PERSONAL	Does not exist today	Exists to a moderate extent today	Exists to a great extent today
Cultural sensitivity			
Leading others (Open to other cultures)	17%	63%	18%
Leading managers (Immerses self into other cultures)	21%	62%	14%
Leading a function or business (Adapts behavior to different cultures)	21%	61%	16%
Leading multi-functions – enterprise (Embraces cultural perspectives)	24%	56%	16%
Adaptability			
Leading others (Adapts own behavior)	10%	64%	23%
Leading managers (Remains positive)	10%	63%	24%
Leading a function or business (Encourages others' flexibility)	14%	63%	21%
Leading multi-functions – enterprise (Builds a change culture)	21%	57%	18%
Courage			
Leading others (Asserts own convictions)	16%	58%	24%
Leading managers (Remains positive)	17%	56%	24%
Leading a function or business (Encourages others' flexibility)	18%	59%	20%
Leading multi-functions – enterprise (Stands up for values)	21%	49%	24%
Learning agility			
Leading others (Seeks new information)	13%	58%	25%
Leading managers (Incorporates feedback)	14%	63%	20%
Leading a function or business (Stretches beyond comfort zone)	19%	59%	19%
Leading multi-functions – enterprise (Creates long-term learning strategies)	25%	54%	18%

CONCLUSION

The findings from this study provide reasons for optimism about the pace and quality of leadership development in Asia Pacific over the coming years. The results also point toward specific actions that companies can do to enhance their ability to groom leaders from within.

By improving execution of their leadership development efforts – through the increased accountability of managers, better technology for managing complex processes like succession, and stronger links between assessment and development – companies will find it much easier to identify leaders ready for the next move up the ladder and prepare them appropriately.

By expanding leadership development programs to encompass those early in their careers and those with greatest potential to become future leaders – and by aggressively targeting underutilized talent pools like female leaders – companies can develop a deeper and stronger bench of candidates ready to fill critical roles.

And finally, by recognizing the importance of people to business success, companies can create cultures, performance management systems and development programs that translate into significant competitive advantage in their markets.

To achieve long-term success, a more strategic and integrated approach to grooming the pipeline of leaders is required. This starts by clarifying business objectives, long-term business needs, and the CEO's agenda. Once understood, these insights can be translated into a comprehensive leadership strategy that defines leadership requirements, summarizes critical competencies, communicates the leadership success profile and, importantly, defines the philosophy and tactics for building leaders from within. This step results in an investable strategy that acts as the roadmap for defining requirements around assessment, development, performance, and succession management policies, practices, and processes.

A second component of the research for this study involved comprehensive interviews with over 30 companies that were identified as having achieved success in one or more areas of leadership development. Through the interviews, we learned from this diverse group of companies about what's working and what is impacting their ability to groom leaders from within. Many of the companies that volunteered to participate in the interviews are not Mercer Leadership Development clients.

For more information about this report, its findings, and how Mercer has helped organizations across Asia Pacific achieve sustainable results in grooming the pipeline of leaders, please visit www.mercer.com/leadership-solutions.

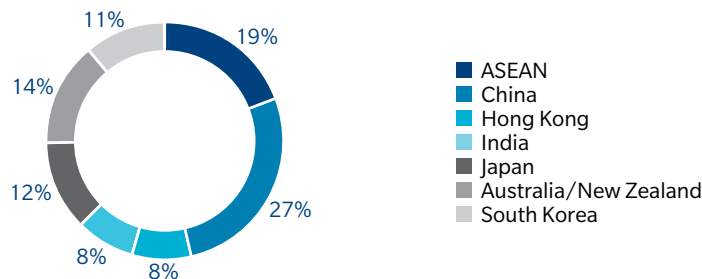
SURVEY DEMOGRAPHICS

This study was conducted in the second and third quarters of 2012. Companies across the region were invited to participate by completing an online survey. 663 companies participated in the survey portion of the research.

Location of respondents

Of the 663 companies surveyed, a little over a quarter (27%) are located in China. (See Exhibit 51.) The next largest group of respondents (19%) is located in ASEAN countries, with Singaporean companies most heavily represented (65%), followed by those in Thailand (16%), Malaysia (9%) and the Philippines (9%). (See Exhibit 51.) Roughly equal numbers of companies participated from Australia/New Zealand, Japan, and South Korea, making up 14%, 12% and 11% of respondents respectively. (See Exhibit 51.) Finally, 8% of respondents are in Hong Kong, while another 8% are in India. (See Exhibit 51.)

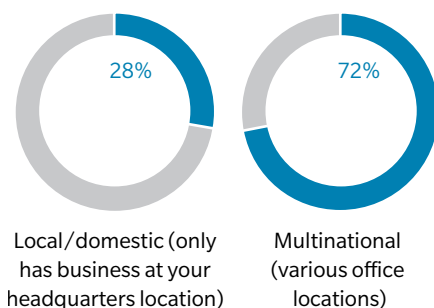
Exhibit 51: Location of survey respondents



Organization type

Almost three-quarters of the organizations participating in this study are multinationals. The balance of organizations (28%) are local/domestic businesses operating only at their headquarters locations. (See Exhibit 52.)

Exhibit 52: Organization type



Headquarters location

The companies included in this study are headquartered all over the world. The highest percentage (17.8%) are headquartered in North America, followed by China (13%), Europe (13%), Australia (11.8%) and Japan (11.2%). Almost 60% of companies participating in the survey are headquartered in the Asia Pacific region. (See Exhibit 53.)

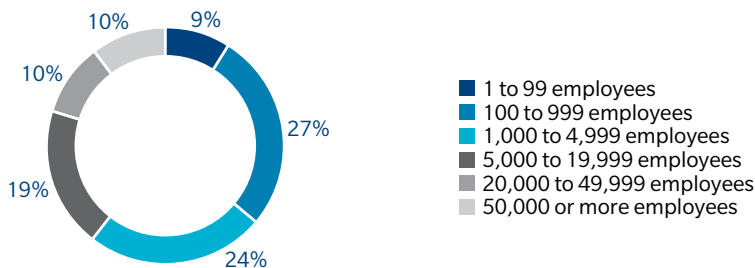
Exhibit 53: Organization headquarters location

Australia	11.8%	India	3.6%	Philippines	0.3%
China	13.0%	Japan	11.2%	Singapore	6.9%
Europe	13.0%	Malaysia	0.8%	South Korea	6.8%
Great Britain	2.9%	Latin America	0.2%	Thailand	0.8%
Hong Kong	4.1%	North America	17.8%	Others	7%

Company size

Over a third of respondents (36%) have less than 1,000 employees, with 75% of those having more than 100. Another quarter (24%) have between 1,000 – 4,999 employees. Almost 40% of respondents have over 5,000 employees, half of which have less than 20,000 and half of which have more. (See Exhibit 54.)

Exhibit 54: Number of employees in organization



Business sector

Survey respondents represent a huge cross-section of industries from apparel and healthcare to government and real estate. The largest sectors represented include high tech (15%), energy (7%), chemical (6%) and pharmaceutical (5%). (See Exhibit 55.)

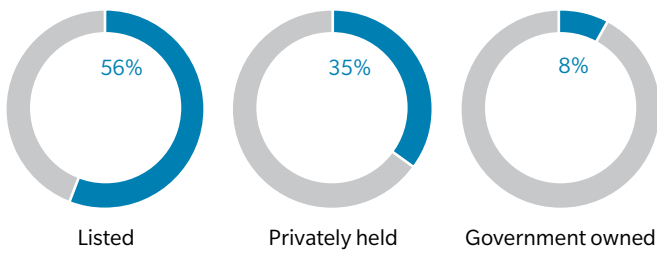
Exhibit 55: Business sector of organization

Apparel	1%	Government	2%	Pharmaceutical	5%
Banking	4%	Healthcare – non-insurance	4%	Real estate	1%
Beverage and tobacco	1%	Hospitality	2%	Retail	3%
Chemical	6%	Insurance	3%	Telecommunications	2%
High Tech	15%	Energy: Mining, Oil and Gas, Utilities	7%	Transportation	5%
Entertainment	2%	Paper and allied products	1%	Others	35%

Organization ownership type

While over half of survey respondents (56%) are listed companies, 35% are privately held and 8% are government owned. (See Exhibit 56.)

Exhibit 56: Organization ownership type



A STRATEGIC AND INTEGRATED APPROACH

Mercer provides today's increasingly dynamic and complex organizations with an end-to-end suite of leadership solutions that help them identify, develop and retain a pipeline of ready, capable leaders who can drive the strategic agenda of the organization and help the organization gain competitive advantage and deliver measurable results.

End-to-end solution: From leadership strategy development and implementation (software and processes) to a full suite of services, including competencies, assessment, development and succession planning, we've got everything covered. Further, we can provide you with a comprehensive understanding of all human capital issues (not just leadership) and how they interrelate and support business imperatives, for example, by working closely with our executive remuneration colleagues we can offer you a thorough understanding of the available options for engagement and retention of leaders. This gives you the benefit of a thoughtful, holistic approach, ensuring a consistent vision that will support an overall talent strategy. This total leadership solution translates into an effective return on your organization's investment in human capital.

Global reach, local presence: We've researched the competencies required of today's leaders across the globe. We understand the leadership needs of a broad range of organizations across all locations and have the resources available to effectively and consistently serve them. This means that we can help you develop and deploy a workforce skilled in today's cross-cultural challenges faster and with greater ease. As an organization with locations in emerging markets you can develop local leadership talent in order to fulfill your sustainable growth agenda. And, as a multi-country or domestic organization interested in grooming leadership talent, you can rely on Mercer's leadership suite to develop a pipeline that reflects the local or country-specific culture while possessing the capabilities to compete in a global environment.

Actionable solutions and sustainable results: We provide both custom and "plug-and-play" research-based solutions as well as global practices that are proven effective, immediately applicable to everyday working life and translate into a sustained commitment to leadership. Enabling you to produce a better "yield rate" within the leadership pipeline, minimize the loss rate of key leadership talent and mitigate the risk of gaps in critical job succession. As a result, you can reap the benefits of leadership's ability to be a powerful engine to build engagement and achieve business imperatives.

CONTACTS

For more information about how Mercer can help develop people who can effectively lead and manage in today's dynamic business environment contact our experts:

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| Australia | New Zealand |
| Austria | Norway |
| Belgium | Peru |
| Brazil | Philippines |
| Canada | Poland |
| Chile | Portugal |
| China | Saudi Arabia |
| Colombia | Singapore |
| Czech Republic | South Africa |
| Denmark | South Korea |
| Finland | Spain |
| France | Sweden |
| Germany | Switzerland |
| Hong Kong | Taiwan |
| India | Thailand |
| Indonesia | Turkey |
| Ireland | United Arab Emirates |
| Italy | United Kingdom |
| Japan | United States |
| Malaysia | Venezuela |
| Mexico | |