

GLOBAL LEADERSHIP DEVELOPMENT

EVERYBODY'S GAME

The Fourth Annual Study of Challenges and Opportunities
— 2013 —

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



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About this study

The 2013 study represents the latest iteration of one of the most comprehensive annual reviews of global leadership development programs in the world. The partnership between American Management Association (AMA), the Institute for Corporate Productivity (i4cp), and *Training* magazine brings together the insights and opinions of nearly 1,200 practitioners worldwide who have contributed to these findings.

Terms

■ **Global Leadership Development (GLD):** For this study we define “Global Leadership Development” as building global skills and competencies (in employees at any level) that are needed to operate in a global business environment (worldwide customers, suppliers, employees, distributors, etc.) regardless of whether or not the organization has operations in other countries.

■ **Market Performance Index (MPI):** While this study focuses on global leaders and their development, it also emphasizes the links between these programs and overall organizational performance. The Market Performance Index (MPI) combines responses to questions related to four key areas of business success: revenue growth, market share, profitability, and customer focus. Tables and graphs throughout this report show the strength of the correlations, or statistical relationship, between the participants’ responses to specific topics and their companies’ MPI scores.

- Organizations in the top one-third of MPI scores are designated **High-Performing Organizations (HPOs)**.
- Organizations in the lower one-third of MPI scores are designated **Low-Performing Organizations (LPOs)**.
- **Global Leadership Development Effectiveness (GLDE):** To further pinpoint the global leadership development practices that link to organizations with the most effective GLD processes, we asked participants to describe the overall effectiveness of their organization’s GLD process on a 5-point scale. Respondents indicating the top two levels of effectiveness comprise the GLDE cohort, which significantly correlates to the MPI.

Study Techniques

The survey participants for the 2013 study were drawn from three sources: AMA and its global affiliates, i4cp’s global survey panel, and subscribers to *Training* magazine. The total respondent population was 1,174, which included 455 who indicated that their organizations had a global leadership development program in place. The final population of participants included 37 industry sectors. Most questions in this study used 5-point Likert-scale type questions, with a 1 rating generally designated as “not at all” and a 5 rating as “very high extent.” There were 21 survey questions, not including demographic questions and those used to calculate the MPI.

Executive Summary

Broader thinking, higher expectations, and deeper analysis characterize the organizations represented in the 2013 iteration of our annual study on global leadership development. This year's findings paint a picture of firms laser-focused on bringing effective global leadership development to their workforces, from their expanded definition of a leader to their shrinking tolerance for lack of results.

Among our 10 key findings, three stand out prominently as pillars in supporting a new outlook for Global Leadership Development (GLD):

- There is a shift to defining leaders by influence, not role. More than half of participants from High-Performing Organizations (HPOs) define leaders not by their position on the organization chart but by their degree of influence and performance. With flatter, more matrixed organizations, individuals are discovering the need for leadership skills while collaborating with colleagues in another business unit, sharing expertise with peers in a different geographic location or working on ad-hoc projects. This broader definition correlates to higher market performance.

- Strategic Workforce Planning is playing a pivotal role in driving GLD content. Long-term strategies and values continue to drive global leadership development, but our study finds increased emphasis on using strategic workforce planning (SWP) to identify competency gaps and drive the content of GLD. Nearly twice as many high-performing organizations as low-performing organizations use SWP in this manner, which correlates to Global Leadership Development Effectiveness (GLDE).

- Critical competencies related to technology and innovation need mastery but are absent from many GLD programs. Organizations are aware of their neglect in key areas of development. The top four competencies that are missing from GLD yet considered important—increased comfort with virtual technology, social network technology, creativity, and building a culture of innovation—are also among the top six competencies identified as having the greatest need for mastery, along with managing virtual teams.

As a base for this report, broader findings about GLD from 2013 were compared to results from previous years. To begin, more organizations are addressing global leadership development this year. The proportion of respondents indicating that their firms had some form of formal GLD was at 31% in both 2010 and 2012; that proportion grew to 39% in 2013. More than half (52%) standardize their GLD for consistency but tweak it at the local level to reflect cultural or geographic nuances.

Also, organizations have tempered self-assessments of their Global Leadership Development Effectiveness (GLDE) from previous years. The proportion reporting GLDE in the top two ratings rose from 2010 (42%) to 2011 (47%) to 2012 (51%) but fell in 2013 to 40%—with even HPOs reporting just 48%. This suggests recognition of the work yet to be done to elevate GLD to meet even higher standards of excellence.

The 2013 report shows that reaching a higher bar for GLD will take concerted efforts from everyone—from employees throughout the company and throughout the world who clamor for these critical skills, to the skilled experts who deliver them, to the top executives who direct the thinking that drives GLD programs. Global leadership development is, indeed, everybody's game.

Key Findings

Key Finding 1

Change is in the wind: Shifts in both external and internal factors impact ability to operate and grow globally

Before we examine how organizations address global leadership development, it helps to understand the environment in which they operate and what affects that environment.

Increasing global competition and uncertainty with regard to regulations or legislation are the top two factors impacting an organizations' ability to perform on the global stage. This is true among High-Performing Organizations (HPOs) and among those with top ranking in Global Leadership Development Effectiveness (GLDE), where one-third point to increasing global competition as a significant trend factoring into their global growth.

Increased global competition. Companies today are performing on a global stage, sometimes without intent. The Internet brings customers and products together from all corners of the world. Competitors are no longer just the brick-and-mortar rival across town but anyone who can deliver the goods. Part of the challenge of global leadership development is understanding the need to tap into markets, consumers and talent from around the globe.

Uncertainty about regulations/legislation. On a global platform, staying on top of legislation can be complex. From the European Commission's rulings on Value-Added Tax to the transparency and data privacy laws that vary from country to country, firms doing business globally must adhere to an ever-changing slate of regulations.

TABLE 1 Which of the following trends impact your organization's ability to operate and grow globally? (select all that apply)				
TRENDS	Percent Overall	Overall Rank	HPO Rank	GLDE Rank
Increased global competition	27.2	1	1	1
Uncertainty with regard to regulations or legislation	26.1	2	2	2
Growing markets outside of your organization's headquartered region	20.5	3	4	6
Shrinking skilled local talent pools	19.5	4	3	5
Changing demographics of your customers or markets you serve	19.2	5	8	7
Ownership/senior management change	16.6	6	5	8
Growing workforce outside home country	13.5	7	6	3
Changing demographics of your workforce	13.4	8	7	4
Moving facilities offshore	6.0	9	10	9
Increased number of non-local suppliers	4.1	10	9	10
Changing demographics of your suppliers	3.3	11	11	11

Internal factors influencing global growth. Other trends that rank high in global impact include some that are internal to participants' organizations, such as growing foreign markets, changing customer demographics, expanding workforces outside the organization's home country and shrinking talent pools.

HPOs (17%) are 52% more likely than LPOs (10%) to recognize growing workforces outside their home country as a trend impacting their ability to operate and grow globally. Couple this with HPOs considering shrinking skilled local talent pools as one of their three highest-ranking trends impacting global growth, and we can infer that HPOs are attuned to the challenge of identifying talent on a global scale. Other findings, however, show that companies admit to being deficient in their knowledge of specific cultures in markets where they operate or plan to operate.

Key Finding 2

Influence trumps authority: Leaders defined by influence, not org charts

A subtle but critical transformation is taking place. Organizations are recognizing that the term "leader" applies to a far broader audience than those at the top echelon of the corporate organization chart.

Role, not position. The largest proportion of participants in this study, nearly four in 10, says that their definition of "leader" is "anyone whose role allows them to influence a group, regardless of direct reporting relationships." Another 14% say "anyone, whether they manage others or not, who is a top-performer in their specific role" is a leader. Together, more than half (53%) define their leaders not by the individual's job level but by their roles of influence and performance.

This broadened outlook about who is a leader is more prevalent among High-Performing Organizations (HPOs) (58%) than the overall study population, and even more so among those respondents whose Global Leadership Development Effectiveness (GLDE) processes are rated most effective. Seven in 10 (70%) respondents with top GLDE ratings determine leaders by the role they play rather than the position they hold.

The implication of this broader definition of leader is that companies need to redesign their processes for identifying who is a leader for developmental purposes as well as readdress the scope and content of training programs.

Flattened, matrixed organizations. This more inclusive definition of leaders has another important implication for global leadership development. The trend toward flatter organizations, with more matrixed relationships crossing traditional reporting lines, means that more individuals will take on roles that require leadership skills. These leadership roles may develop while working with peers in other business units, lending expertise to a new geographic operation or even when working on a short-term project.

The performance payoff. As organizations find the need for global leadership skills transcending typical job titles, such as vice president or director, they will benefit from exposing a larger swath of employees to opportunities to build the leadership skills that will be used globally. Not only will they be introducing critical Global Leadership Development (GLD) skills to a larger proportion of their workforce, but the study also finds compelling evidence for doing so: market performance. Overall,

the definition of “leader” has a significant negative correlation to market performance, meaning the higher a firm’s MPI, the more likely they are to define “leader” in broader terms (bottom of table below) and the lower a firm’s MPI, the more likely they are to define “leader” in narrow terms (top of table below).

TABLE 2 Which one of the following statements best reflects your organization’s definition of a “leader”?	
DEFINITION OF “LEADER”	Percent
Anyone at a VP level and above	6.1
Anyone at a Director level and above	9.2
Anyone at a Manager level and above	12.7
Anyone in charge of a group of employees or a function	16.6
Anyone whose role allows them to influence a group, regardless of direct reporting relationships	38.9
Anyone who is in a position that is designated “critical” to our company	2.2
Anyone, whether they manage others or not, who is a top-performer in their specific role	14.2
Correlation to MPI	-.11**

**Indicates a statistically significant correlation

Key Finding 3

Strategic workforce planning: The secret ingredient driving global leadership development

The structure of an organization’s Global Leadership Development (GLD) process is influenced by many factors, including the key impetus behind the design of the programs. Continuing the trends seen in the 2012 survey, long-term business strategies and corporate values remain the primary drivers of the GLD process in 2013. Differing, however, is the finding that strategic workforce planning (SWP) is playing an increasing and impactful role in driving GLD.

Long-term strategies and values. Two-thirds of study participants overall selected each of these two factors as significant drivers of their GLD process in 2013. There is good reason why these two factors continue to play an important role in shaping GLD processes: both have proven to be key differentiators between High-Performing Organizations (HPOs) and Low-Performing Organizations (LPOs).

- Competencies that have been derived from long-term business strategies—73% of HPOs vs. 55% of LPOs
- Expressed corporate values—71% of HPOs vs. 52% of LPOs

Strategic workforce planning.¹ It makes sense that the role of SWP in driving GLD has escalated since 2012. In a recent i4cp report, *Building a Change-Ready Organization: Critical Human Capital Issues 2013*, workforce planning emerged as one of the top three issues. While many organizations focus on operational workforce

¹ i4cp’s 2011 *Strategic Workforce Planning Survey* defined workforce planning as a generic term encompassing various components of human capital practices, including the thoughtful and deliberate review of current and future workforce needs. Analytics, forecasting, planning and aligning human capital processes to meet business needs are included in workforce planning.

planning, such as tracking headcount, strategic workforce planning focuses on what is needed in order to *lead* the business, and succession planning is one part of that. SWP ensures the organization is prepared to anticipate and adapt to change. Nearly twice as many HPOs as LPOs were found to engage in SWP in that study.

In this study, "competency gaps identified through SWP" is the third key driver of GLD processes and is also a factor that has a significant correlation to Global Leadership Development Effectiveness (GLDE). What's more, the use of SWP processes to identify competency gaps that drive the content of GLD processes produces an even higher differentiation between HPOs and LPOs than did either of the top two drivers.

- Identifying competency gaps through strategic workforce planning process—48% of HPOs vs. 26% of LPOs

GLD programs themselves need to reflect that SWP is core to the long-term business strategy and corporate values.

Involvement of senior management team/thought leaders. The study also reveals other driving factors for GLD processes that are impactful.

- "Specific requests or direction from the senior management team" is a factor that reveals a huge differentiation between HPOs and LPOs (37 percentage points) and is significantly correlated to MPI. This finding has an interesting connection to the obstacles of study participants and is discussed more in Key Finding 10.

TABLE 3
Which of the following factors are significant drivers of your organization's GLD process?
(select all that apply)

FACTOR DRIVING GLD	Percent	2013 Overall Rank	2012 Rank	Corr. to MPI	Corr. to GLDE
Competencies that have been derived from our long-term business strategies	66.6	1	1		
Our expressed corporate values	65.8	2	3		.19**
Competency gaps identified through our strategic workforce planning process	43.6	3	5		.17**
Specific requests or direction from the senior management team	41.2	4	2	.16**	
Geographies or markets where our company has operations	39.8	5	New in 2013		
Ongoing performance reviews of our management team	39.0	6	4		.18**
Geographies or markets where our customers (or prospective customers) are located	35.3	7	New in 2013		
Principles in the general body of literature regarding global leadership development	32.4	8	6		
Advice from thought leaders outside the organization	30.7	9	7		.21**
Curriculum developed by vendors that we use for these programs	24.6	10	8		

Respondents who report having no leadership development program were not shown this question.
**Indicates a statistically significant correlation.

- “Ongoing performance reviews of the management team” are used by 45% of HPOs vs. 29% of LPOs and significantly correlates to GLDE. This indicates that the performance review process can provide insight to the most critical needs of the GLD program.
- Last but not least, “advice from thought leaders outside the organization” produces a significant correlation to GLDE, the highest of all factors driving GLD. This suggests there are benefits to considering expert opinions from beyond the organization’s walls.

Key Finding 4

Self-selection: A sleeper tool for boosting GLD effectiveness

One of the most critical elements of any Global Leadership Development (GLD) process is determining who should have the opportunity to participate. As expected, C-levels and those being groomed for such positions are the groups most frequently targeted. Emerging, however, is a fascinating argument for opening GLD to managers who self-select.

Primary targets. “High-potential” employees are most often offered GLD opportunities, closely followed by managers who have been formally identified as potential successors to the C-suite. It makes sense to arm these rising stars with the knowledge and experience they’ll need to make a business impact on a global level.

Understandably, C-suite level executives are also prime targets for such global leadership development. There are nuances in the study findings, however, that present some interesting insight for organizations considering who should be invited to partake of GLD offerings.

Opening GLD to self-selection. Making the GLD process available to any manager who expresses interest in global leadership development is a practice that significantly correlates to Global Leadership Development Effectiveness (GLDE) (.18**). Additionally, this practice returned a difference of 10 percentage points between High-Performing Organizations (HPOs) (17%) and Low-Performing Organizations (LPOs) (7%).

This approach can help organizations uncover hidden gems: managers with a penchant for broadening their knowledge and sharpening their global leadership skills. This inclusive practice ties to broader trends toward self-selection, such as in identifying high-potential employees and creating project teams.

Succession planning. Any decision about who should receive GLD should include consideration for succession planning and creating a pipeline of successors who are well versed in global skills. Delivering GLD to those who self-select—those with a passion to learn and grow in a global context—can broaden the succession pipeline talent pool with managers who have a global mindset. Another way to ensure that the pipeline is well stocked with global-minded managers is to require all managers to participate in GLD. This requirement proved to be a significant differentiator (18 percentage points) between HPOs (20%) and LPOs (2%).

TABLE 4 Which of the following groups of employees is your organization's GLD process designed to target? (select all that apply)	
TARGET FOR GLD PROCESS	Percent
All employees who have been identified as "high-potentials"	44.3
Managers who have been formally identified as potential successors to the C-suite	43.3
C-suite-level executives	37.5
All employees who currently have job duties or manage team members outside their country of origin	22.3
All employees who are likely to be responsible for duties or management assignments outside their country of origin	19.0
All managers are required to participate in global leadership development	16.7
Any employee nominated by someone in their line of supervision	14.7
Any manager who expresses interest in global leadership development	13.4
Any employee, regardless of whether he/she is a manager, who expresses interest in global leadership development	11.1
All employees are required to participate in global leadership development	7.6

Respondents who report having no leadership development program were not shown this question.

Key Finding 5

The agile global mind: Today's leaders access a diverse skill set to pursue business and people excellence

Twenty-six competencies are examined in this study, including people/communication skills, business skills and global skills. The top 10 competencies that are incorporated into Global Leadership Development (GLD) programs draw from all three categories, demonstrating recognition that global leadership development requires broad learning.

The GLD slate in 2013. Managing change and critical thinking/problem solving remain the top two competencies for GLD in 2013, just as they were in 2012 and 2011, but some other notable skills join the overall top 10 competencies in this year's survey. These include creating a culture of engagement, business acumen, embracing diversity, and political savvy. Competencies that fell from the overall top 10 are the ability to build/influence coalitions, leading cross-cultural teams, and creativity.

Business skills dominate. There are 12 competencies presented in this category, and six made it into the top 10 overall GLD competencies: managing change, critical thinking/problem-solving, general business acumen, strategy development, strategy execution, and managerial agility. This indicates the far-reaching relevancy of strong business capabilities in global leadership.

- The biggest differentiators for High-Performing Organizations (HPOs) are critical thinking/problem-solving (58% of HPOs and 48% of LPOs) and strategy execution (49% of HPOs and 39% of LPOs). The former speaks to the need for leaders at all levels who can synthesize information and solve problems, even in ambiguous situations. The latter speaks to the need to align goals and enforce accountability throughout the organization.

- Both of these competencies are significantly correlated with the Market Performance Index (MPI) and Global Leadership Development Effectiveness (GLDE).

The nuances of communication. Within the six competencies studied in this category, three made the top 10 overall competencies included in GLD: creating/supporting a culture of engagement, interpersonal/political savvy, and emotional intelligence. The appearance of these competencies on the top 10 list makes a strong statement about the importance of business communication and its nuances. Two of these competencies demonstrate a very high differential between HPOs and LPOs.

- Interpersonal/political savvy, a competency added this year, is included in the GLD programs of 48% of HPOs and 30% of LPOs. This includes critical interpersonal skills such as demonstrating respect, diplomacy, tactfulness, encouragement, reason and other qualities of communication.
- Creating/supporting a culture of engagement is offered by 58% of HPOs and 41% of LPOs. The emphasis on building employee engagement fits well with the findings of other studies. In i4cp's *Talent Management in the Trenches*, more than 80% of HPOs said it was very/highly important to involve front-line managers in employee engagement. Offering such development for GLD provides those needed skills.
- Both of these competencies are significantly correlated with both MPI and GLDE.

Global skills overshadowed. Just one (embracing diversity) of the eight global competencies in this category is on the overall top 10 list of those included in GLD.

- Embracing diversity (cultures, ethnicities, lifestyles, etc.) is included in 48% of HPOs' GLD programs and 44% of LPOs'. This emphasis on welcoming diverse participation is a stepping stone to more fully understanding and leveraging diversity in business.
- This global competency has a significant correlation to GLDE.

It may seem odd that other global competencies aren't featured more prominently, but this is simply a reflection of the strong focus on business skills within the top 10 list. In fact, two other global skills that did not make the top 10 list of competencies demonstrate large differentials for the HPOs that did address them, and both were significantly correlated to MPI and GLDE.

- Applying ethical standards in multiple cultures is a GLD competency for 43% of HPOs and 23% of LPOs.
- Knowledge and understanding of specific cultures in markets the company sells/services or plans to sell/service is a GLD competency for 33% of HPOs and 18% of LPOs.

TABLE 5
The overall top 10 competencies included in GLD in 2013

COMPETENCIES	Percent Overall	Overall Rank 2013	Rank among HPOs	Rank 2012	Corr. to MPI	Corr. to GLDE
Managing change	58.2	1	1	1		
Critical thinking/problem solving	55.7	2	2	2	.10**	.23**
Creating/supporting a culture of engagement	52.4	3	3		.12**	.20**
General business acumen	47.8	4	7			
Strategy development	46.9	5	4	4		.26**
Embracing diversity	45.8	6	8			.19**
Strategy execution	44.6	7	5	5	.12**	.29**
Managerial agility	42.6	8	10	6		.28**
Interpersonal/political savvy	41.6	9	6		.13**	.27**
Emotional intelligence	40.4	10		8	.10**	.19**
Other competencies in 2012's top 9:						
Ability to build/influence coalitions			9	3		
Leading cross-cultural teams				7		
Creativity				9		

**Indicates a statistically significant correlation

Key Finding 6

Missing in action: Virtual technologies and creativity/innovation are conspicuous by their absence in GLD programs

Just as telling as *what is* included in Global Leadership Development (GLD) is *what is not* currently included yet thought to be important. These are the competencies that organizations may want to address in their future GLD offerings.

Topping the “missing in action” list. The top four competencies that respondents point to as not included in their current GLD but important represent two broad themes: creativity/innovation and expertise using technology-enabled communication tools.

The importance of adding these missing competencies is fortified by findings in i4cp’s 2013 report *Human Capital Practices That Drive Innovation*. In that study, two-and-a-half times as many High-Performing Organizations (HPOs) as Low-Performing Organizations (LPOs) use technology-enabled collaboration or social media tools to share knowledge.

The techno-elephant in the room. With employees, customers and suppliers around the world, the need for global leaders with comfort and competence in technology is a given. Shrinking travel budgets also increase the demand for skills in using virtual technology. Such competencies are recognized in this study as being critically important, even as participants admit their organizations are not addressing them adequately.

- Topping the 2013 list of competencies missing from GLD but considered important is comfort and competence with the latest advances in virtual technology. More than half of HPOs (53%) and an even larger proportion of LPOs (59%) confess that this competency is missing but important.
- Comfort and competence with social network technology is 4th on the overall list of competencies not currently included in GLD but important. It is missing from GLD in 44% of HPOs and 51% of LPOs in 2013 and was also on the list in 2012, when it appeared for the first time.

Technology advances happen almost exponentially, so it may not be feasible for global leaders to be on top of each new development. Just as rapidly, however, new applications are introduced that quickly become standards. Social networking is a key example of this. Organizations may be able to tap into their multi-generational workforce to build such skills in global leaders in the absence of a formal training program.

Creativity/innovation awaiting nurturing. While the terms creativity and innovation were once primarily associated with the development of new product lines, they are now recognized as key concepts to be applied to internal processes, sourcing, communicating, organizational structures, and just about every other aspect of business. This recognition is reflected in their high placement on the 2013 list of overall competencies not included in GLD but considered important.

- More than half of respondents say creativity is missing from their GLD but important, placing it 2nd on the list. What's more, creativity significantly correlates to both the Market Performance Index (MPI) and Global Leadership Development Effectiveness (GLDE).
- Creating/supporting a culture of innovation is 3rd on the list and also highly correlates to GLDE, demonstrating that such competencies are valuable additions to an organization's profile.

The absence of these competencies in GLD programs may reflect a philosophy that creativity and innovation are less likely to be taught than they are to be nurtured. Organizations may find that diverse working groups help to jumpstart creative thinking as well as establishing a culture of innovation.

Business numbers are your friends. In addition to dominating the list of competencies included in GLD, 7 of the 12 business competencies in this study are on the 2013 top 10 list of competencies not currently included in GLD programs but important. Two of them—both related to understanding business numbers—are the source of large differences between HPOs and LPOs, with low-performers reporting the absence of these competencies to a larger extent than HPOs.

- Data analysis is 5th on the overall list, with 40% of HPOs and 50% of LPOs not including it. It was also a competency significantly correlated to the MPI.

- Financial management acumen is 9th on the overall list, with 39% of HPOs and 51% of LPOs not including it.

As the demand for results in all aspects of business continues to rise, leaders must be able to make sense of data and translate it into information that supports business decisions, such as vendor selections, resource allocations, acquisitions and others. Likewise, deepening knowledge of business financial operations is a key to developing the kind of broad business foundation that is essential in global leaders. Senior-level mentors in the finance business unit and reverse mentoring from new graduates who are data gurus are two sources for building such knowledge.

Global cultural knowledge rules. Two of the eight global competencies are on the 2013 top 10 list of those not currently included in GLD programs but considered important. Not only do both relate to understanding different cultures, but both are also significantly correlated to MPI and GLDE.

- Knowledge and understanding of specific cultures in markets the company sells/services or plans to sell/service is 6th on the overall list. It is also the source of a large HPO/LPO differential, with low-performers (51%) reporting the absence of these competencies to a larger extent than HPOs (40%).
- Leading cross-cultural teams is 7th on the overall list and has the unique distinction of being the only competency on the 2013 top 10 not-included-but-important list that is missing more among HPOs (48%) than LPOs (45%).

A lack of cultural understanding just might be the biggest threat to a global leader's success. Other than formal training programs, organizations should consider immersing leaders in new cultures via rotational assignments, executive exchanges and other approaches.

TABLE 6
The overall top 10 competencies *not* currently included in GLD but considered important

COMPETENCIES	Percent Overall	Rank 2013	Corr. to MPI	Corr. to GLDE
Comfort/competency with latest advances in virtual technology	54.0	1		
Creativity	50.2	2	.11**	.20**
Creating/supporting a culture of innovation	46.3	3		.38**
Comfort/competency with social network technology	45.7	4		
Data analysis	44.7	5	.11**	
Knowledge/understanding of specific cultures in markets the company sells/services or plans to sell/service	44.5	6	.17**	.18**
Leading cross-cultural teams	43.9	7	.11**	.23**
Managing in a matrixed organizational structure	42.5	8		
Financial management acumen	42.2	9		
Strategy execution	42.0	10	.12**	.29**

**Indicates a statistically significant correlation

Key Finding 7

Reality check: Organizations confess less mastery of global leadership competencies than last year

For each of the 26 competencies studied, respondents shared the extent to which the majority of their leadership teams have demonstrated mastery. As one might expect, the mastery of nearly every competency is highly correlated with both the Market Performance Index (MPI) and Global Leadership Development Effectiveness (GLDE).

Differences in 2013. Comparison of 2013 findings to 2012 are based on mastery levels at the top end of the scale—the percentages of respondents indicating mastery to a high or very high extent. Compared with 2012’s top 9 competencies, organizations in 2013 report less mastery of nearly every competency on the list, with the largest drop noted in strategy execution.

TABLE 7A The top 9 GLD competencies in 2012, comparing mastery levels in 2012–2013 (high/very high extent)			
TOP 9 COMPETENCIES 2012	Percent Mastery 2012	Percent Mastery 2013	Percentage Point Drop/Gain in Mastery
Change management	34.0	31.1	-2.9
Ability to influence and build coalitions	36.0	26.7	-9.3
Critical thinking/problem solving	42.5	42.3	-0.2
Leading cross-cultural teams	31.5	22.3	-9.2
Managerial agility	35.5	27.9	-7.6
Emotional intelligence	28.5	26.5	-2.0
Creativity	23.5	26.4	+2.9
Strategy execution	43.0	33.6	-9.4
Strategy development	45.5	36.2	-9.3

Why the drop? The business environment today is more focused than ever on performance and accountability. Accompanying that is an increased demand for measures. With the spotlight aimed on providing evidence of performance improvement, organizations are stepping up their efforts to evaluate performance and progress. As the demand for demonstrated competency increases, so does the awareness of deficiencies.

Areas of greatest need. In addition to analyzing the competencies with the highest levels of mastery, this study also looks at competencies through the lens of greatest needs based on the percentages of respondents indicating mastery to a small extent or not at all.

The most work to be done in mastering competencies lies in global competencies, but competencies related to technology are a big challenge, too. The following discussion and table focuses on those competencies most lacking in mastery.

Putting the global back in GLD. Respondents indicate low mastery levels in more than half of the eight global competencies studied, including language fluency in other markets, multicountry supply chain management, leading cross-cultural teams, execution of global strategy, and knowledge of specific cultures in other markets. Two of these are also among the top 10 competencies noted as being important but not currently included in GLD:

- Knowledge of specific cultures in markets in which the company operates or plans to operate. A lack of mastery here impacts an organization in multiple ways, including failure to connect with the customer base, difficulty in building relationships with local vendors and inability to attract and retain talent.
- Leading cross-cultural teams. Leaving this competency unaddressed opens an organization to misunderstandings, declining productivity, poor engagement levels, failure to leverage cultural insight and other implications.

The perils of losing ground to technology. Several competencies among those with the greatest need for mastery relate to building skills in technology-enabled communications.

- Comfort and competency with the latest advances in virtual technology is the 2nd greatest mastery need, not surprising since it tops the list of important competencies not included in current GLD programs in the previous section. But the longer such learning is left unaddressed, the more difficult it will be to catch up. With multigenerational work teams, lack of mastery in such technology can create chasms between team members, affecting morale, productivity and collaboration.
- Comfort and competency with social network technology is another mastery need that also appears on the missing-but-important list of GLD competencies. Mastering such collaborative and social media tools is vital if globally dispersed teams are to be productive since they are essential to working virtually. Also, organizations can lose a competitive edge if they're unable to leverage social networking to their advantage in marketing and sales.
- Managing virtual teams is a mastery need that appears to have fallen into an abyss—neither on the list of top 10 competencies in GLD nor on the top 10 list of important competencies not included in GLD. It's a mistake to assume that this competency is unimportant, however. A leader who is not adept at managing a virtual team may find that virtual collaboration, team camaraderie and productivity suffer.

Aspects of the business culture. Several business competencies show a notable need for mastery improvements, and each of them is among the top 10 competencies not currently included in GLD but considered important. This may reflect thinking that these competencies don't lend themselves to a classroom very well; therefore, organizations need to explore alternative development methods.

- Creativity. This is the only competency on last year’s top 9 that shows an increase in mastery for 2013, which could reflect a nascent trend toward providing employees with dedicated time for creative-thinking. This competency’s appearance on the list of greatest needs, however, shows that there is still much to accomplish.
- Creating/supporting a culture of innovation. This need for mastery reflects a recognition that innovative thinking needs to permeate an organization, from products to processes and from customers to corporate board rooms.
- Managing in a matrixed organizational structure. The need to increase mastery here cannot be overemphasized, especially in light of the broadening definition of “leader” that participants have noted. GLD programs need to address how those without explicit authority can exercise leadership skills across organizational lines and geographic boundaries.

TABLE 7B The overall top 10 greatest needs in mastery of GLD competencies in 2013 (mastery to a small extent/not at all)		
COMPETENCIES	Percent Overall	Rank 2013
Fluency in prominent language	48.8	1
Comfort/competency with virtual technology	44.9	2
Comfort/competency with social network technology	44.8	3
Creativity	39.6	4
Managing virtual teams	37.9	5
Creating/supporting a culture of innovation	36.3	6
Multicountry supply chain management	35.3	7
Leading cross-cultural teams	34.3	8
Execution of global strategies	34.0	9
Knowledge of specific cultures in markets where company operates or plans to	34.0	9 (tie)
Managing in a matrixed organizational structure	33.3	10

Key Finding 8

Breaking the mold: Diverse delivery approaches augment instructor-led classroom training

Just as important as the competencies selected to present in Global Leadership Development (GLD) is the decision on *how* to deliver the learning. This study drills down into five popular competencies to see which of 11 practices (mix of instructional and experiential) organizations find most effective for developing leaders’ skills. This insight focuses on the five competencies that are consistently among the top five offered in GLD programs from previous iterations of this study.

Effective delivery approaches. Organizations, even High-Performing Organizations (HPOs), still look to traditional instructor-led classroom training as their number one source for developing leadership skills. The top three approaches for each of the five competencies appears in the table below. However, some lesser-used approaches also show notable differences between the practices of HPOs and LPOs.

- Change management. Virtual (online) instructor-led training is the largest differentiator between HPOs (27%) and LPOs (19%) for teaching change management skills.
- Ability to build/influence coalitions. Formal mentoring is a notable source of differentiation between HPOs (25%) and LPOs (14%) for building coalitions.
- Strategy development. Coaching from external professionals produces the largest differentiation between HPOs (24%) and LPOs (13%) for teaching strategy development.
- Critical thinking and problem-solving. Self-paced eLearning differentiates HPOs (22%) and LPOs (15%) for critical thinking and problem-solving.
- Execution of global strategies. Coaching from external professionals is a differentiator between HPOs (13%) and LPOs (7%) for execution of global strategies. Additionally, organized visits to customers or partners in geographies/markets the organization serves is the only practice that shows a significant correlation to GLDE, yet only 9% of overall respondents and 11% of HPOs use it.

Teacher’s favorite? There’s no denying that respondents are keen on traditional classroom-based instructor-led training. But is this just reflecting comfort with their best-known approach? As we see other less-used learning practices named as effective approaches, people could be recognizing that current methods may not be as effective as they think. Organizations need to take the risk and venture into more virtual training, especially since competencies in technology have such a prominent role in this study’s findings.

TABLE 8 Top 3 most effective ways organizations are addressing selected competencies that were consistently among the top 5 competencies in GLD programs (select 1-3)					
EFFECTIVE APPROACH	Change Management	Critical Thinking/ Problem Solving	Ability to Build/Influence Coalitions	Strategy Development	Execution of Global Strategies
Traditional classroom	(1) 56%	(1) 51%	(1) 37%	(1) 43%	(1) 27%
Stretch assignments	(2) 26%	(2) 30%	(2) 27%	(2) 25%	(3) 23%
Internal coach		(3) 21%		(3) 24%	(2) 27%
Formal mentor			(3) 22%		
Self-paced e-learning	(3) 24%				

Key Finding 9

Evaluation measures reflect a growing business imperative: Business performance and engagement take a more prominent role in determining GLD effectiveness

The emphasis on results pervades every area of a business, and Global Leadership Development (GLD) programs are no exception. This year's study shows evaluation measures beginning to move away from the familiar "smiley-face" standby of participants' satisfaction ratings and toward more business-oriented performance measures.

The slip of the smiley-face. The top two metrics for evaluating the success of GLD in 2012 also top the list in 2013 with one slight, but meaningful, difference: Observable changes in the specific behavior of participants moved up into the top slot while participants' satisfaction ratings fell to 2nd place. This demonstrates a subtle movement in measurement philosophy, with less dependence on simple "happy" measures and more emphasis on valuing behavior change as evidence of learning.

This movement is further strengthened by the finding that surveys conducted with the management team about the global-focused training's perceived value has fallen from favor, moving from its 4th place ranking in 2012 to 9th in 2013. Such surveys may well be considered the management-level version of the smiley-face evaluation, lending additional evidence that such metrics are too superficial for today's results-oriented culture.

The rise of the business case. Another change in the ranking of metrics is even more dramatic: Business performance measurements such as sales or productivity are taking a more prominent role in the evaluation of the effectiveness of GLD processes in 2013, moving from its 9th place ranking in 2012 to 3rd place in the current iteration.

Also seeing an uptick in 2013 is the engagement scores of the leaders' direct reports or department, moving from 8th-ranked in 2012 to 6th-ranked in 2013. This metric is the measure most significantly correlated to Global Leadership Development Effectiveness (GLDE), suggesting that GLDE is the best business case for measures that show results of global leadership development in action.

The demand for accountability. It may well be that boards of directors and shareholders are behind the increasing emphasis in measuring the effectiveness of company initiatives—like global leadership development—that require investments in capital, time and effort. Executives are under increasing pressure to provide quantifiable results. This study also found that, in trying to get a handle on the most effective way to evaluate GLD program success, organizations are increasingly turning to vendors for help. In fact, the use of vendors to assist in measurement and evaluation of GLD program success rose from its 6th place ranking in 2012 to a 2nd place ranking in 2013.

TABLE 9
Which of the following metrics are significant factors in how your organization evaluates the success of its GLD process? (select all that apply)

METRICS TO EVALUATE GLD PROCESS SUCCESS	Percent	2013 Rank	2012 Rank	2013 Corr. to GLDE
Observable changes in specific behaviors of participants	63.0	1	2	
Participants' satisfaction ratings	60.0	2	1	
Business performance measure such as sales or productivity	41.7	3	9	
Formal performance reviews of participants before and after completing any global-focused training (i.e., benchmarking)	38.3	4	3	.19**
Knowledge achieved using post-training assessment	35.7	5	6	.18**
Engagement scores of the leaders' direct reports or department	35.7	6	8	.21**
Customer satisfaction scores	32.8	7	7	
Feedback collected from focus groups composed of global-focused training graduates	24.3	8	5	.18**
Surveys conducted with the management team about the global-focused training's perceived value	22.1	9	4	

Respondents who report having no leadership development program were not shown this question.
 **Indicates a statistically significant correlation.

Key Finding 10

An ironic twist: Lack of executive leader sponsorship for GLD is a very real obstacle for some

What is holding organizations back from being able to deliver effective Global Leadership Development (GLD)? This knowledge is vital for creating approaches for overcoming these obstacles and setting organizations on a path toward a level of global leadership development that pays off in improved performance.

The brick walls. Study participants point to a lack of budget/budget constraints as the top obstacle to delivery of effective GLD, and this was true among High-Performing Organizations (HPOs) as well.

More striking, though, is the obstacle they rank 2nd: a lack of executive leader sponsorship for GLD. Even respondents from HPOs agree this is a major blocking point. This missing support is significant in two ways:

- First, the lack of executive leader sponsorship was found to have a significant negative correlation to Global Leadership Development Effectiveness (GLDE), meaning the more there is a *lack* of executive leader sponsorship the more likely the organization reported a low GLDE score.
- Second, in Key Finding 3 (Drivers), requests or direction from the senior management team in driving the organization's GLD process is a huge differentiator between HPOs and LPOs (more than 3 ½ times) and is significantly correlated to the Market Performance Index (MPI).

Thus, we see that when the senior management team provides direction in driving the organization’s GLD process and is seen as a visible sponsor of GLD, such actions correlate not only to global leadership development effectiveness but also to market performance.

Other obstacles also present interesting lessons to organizations trying to maximize the effectiveness of their GLD efforts:

- **Out of touch.** HPOs are more likely than overall study participants to recognize inadequate follow-up or reinforcement training following the conclusion of an initial GLD program as an obstacle. Overall, study participants rank that obstacle 4th, but HPOs rank it 3rd. Of all obstacles studied, inadequate follow-up is the largest differentiator between HPOs (25%) and LPOs (17%).
- **Out of sight.** A lack of visibility into the organization’s global talent pool (who has what skills in each geographic location) is another obstacle that HPOs are more in tune with than the overall study group. It ranks just 7th among overall respondents, but HPOs rank it 4th.
- **Out of line.** A lack of alignment with the organization’s strategic workforce planning (SWP) initiative is a barrier to effective GLD that shows a significant negative correlation to MPI, meaning the more there is a *lack* of alignment with SWP, the more likely the organization is to report a low MPI score. In Key Finding 3, we saw that SWP is used to identify competency gaps, which is one of the important drivers of GLD.

TABLE 10 Which of the following obstacles must be addressed in order to deliver effective global leadership development? (select 1-3)			
OBSTACLES TO GLD	Percent	Corr. to MPI	Corr. to GLDE
Lack of budget/budget constraints	45.4		
Lack of executive leader sponsorship	33.9		-.21**
Perceived time constraints	23.1		
Inadequate follow-up or reinforcement training following conclusion of initial program	22.0		
Inadequate internal resources to deliver global program	20.5		
Lack of alignment with organization’s strategic workforce planning initiatives	20.2	-.12**	
Lack of visibility into organization’s global talent pool (i.e. who has what skills in each geography)	20.0		
Difficulty establishing global consistency	11.6		
Lack of transparency/consistency in participant selection criteria	11.2		
Difficulty identifying appropriate content	6.5		
Challenges identifying appropriate global delivery partner	5.9		

**Indicates a statistically significant correlation

Conclusion

This fourth annual study on global leadership development (GLD) reveals a powerful shift in viewing GLD as something more than the outcome of a set of training events—it is the product of a culture and mindset that drives a holistic strategy for building leadership competency throughout the organization.

As organizations contemplate what it takes to compete on a global stage, they are raising the bar for GLD. Although some key components of GLD have remained steady over the past few years, the business environment is anything but status quo. There is a more progressive recognition emerging of what is required to work beyond borders.

Following are several meaningful ways in which organizations can excel at developing global leaders.

- **Adopt a broader view of “leaders”**—Deliver leadership training to anyone whose role provides them with an opportunity to influence others, not just to those in specific job titles. Invite all to the table.
- **Offer an expanded set of hard and soft skills**—Continue to address critical competencies such as managing change and problem-solving, but improve mastery of managing virtual teams and social network skills. Develop more agile leaders with learning in creativity and building a culture of innovation.
- **Look beyond the classroom**—Accelerate leadership competencies with new approaches, such as online instructors, e-learning, coaching and mentoring. Increase the number of modalities offered and you’ll appeal to a larger proportion of the multi-generational workforce.
- **Align GLD with SWP**—Use strategic workforce planning to identify competency gaps that can be addressed via GLD. Ensure that GLD is provided to a diverse set of candidates for the succession pipeline.
- **Tune in to global cultures and markets**—Broaden leaders’ knowledge of the culture in regions your organization operates in or serves. Build a global mindset and cultural awareness in all employees who may interact with co-workers, customers, vendors and others around the globe.
- **Invite the best minds**—Involve the senior management team in driving the structure and content of GLD. Ask them to share their knowledge and stories in videos. Leverage the expertise of external thought leaders, too.

These findings embolden the role of those charged with developing leaders. In their constant quest to build talent with a more global mindset, their work has strategic implications for the future. They will be helping to produce employees who are better able to lead across borders, lead in a virtual workplace, lead within various cultures and lead without formal authority.

This study presents insights from a wide cross-section of the global business community. Organizations, however, should consider these findings in relation to their own industry and organizational culture and apply this knowledge in a manner that fits their unique environment.

Appendix

Demographic Questions

Primary industry	
RESPONSE	Percent
Aerospace & Defense	2.2%
Agriculture	0.8%
Automotive & Transport	2.1%
Banking	2.7%
Beverages	0.3%
Business Services	7.1%
Charitable Organizations	1.2%
Chemicals	1.7%
Computer Hardware	0.5%
Computer Services	1.0%
Computer Software	2.4%
Construction	1.7%
Consumer Products Manufacturers	1.7%
Consumer Services	0.8%
Cultural Institutions	0.3%
Education	10.0%
Electronics	0.7%
Energy & Utilities	3.5%
Environmental Services & Equipment	0.6%

Primary industry	
RESPONSE	Percent
Financial Services	4.8%
Food	1.7%
Foundations	0.3%
Government	8.4%
Health Care	10.0%
Industrial Manufacturing	4.2%
Insurance	4.6%
Leisure	0.8%
Media	1.1%
Membership Organizations	1.0%
Metals & Mining	0.7%
Other	9.7%
Pharmaceuticals	3.1%
Real Estate	0.8%
Retail	2.1%
Security Products & Services	0.6%
Telecommunications Equipment	0.3%
Telecommunications Services	3.0%
Transportation Services	1.8%

n=1,447

Geographic structure	
RESPONSE	Percent
Global (high level of global integration)	33.9%
Multinational (national / regional operations act independently)	20.0%
National (operations in one country only)	46.2%

n=1,447

Size of workforce throughout the world	
RESPONSE	Percent
1-24 employees	11.7%
25-49 employees	3.6%
50-99 employees	3.1%
100-249 employees	7.3%
250-499 employees	7.6%
500-999 employees	8.1%
1000-4,999 employees	16.9%
5,000-9,999 employees	9.4%
10,000-19,999 employees	8.9%
20,000-49,999 employees	7.5%
50,000-99,999 employees	6.4%
More than 100,000 employees	9.7%

n=1,448

Job level	
RESPONSE	Percent
Board Member/Chairperson	0.6%
CEO/President	6.4%
Partner/Owner	4.3%
C-level executive	2.6%
EVP/SVP	1.5%
VP	4.6%
Director	20.9%
Manager	32.9%
Supervisor	5.5%
Individual Contributor	15.1%
Other	5.7%

n=1,448

Department/Function	
RESPONSE	Percent
Accounting/Finance	2.3%
Administrative	2.3%
Consulting/Advisory	4.8%
Creative Services	0.4%
Customer Service/Account Management	2.6%
Engineering	1.4%
Executive/Owner	4.1%
Facilities Management	0.8%
General Management	3.5%
Human Resources	17.3%
Information Technology	3.0%
Legal	0.3%
Marketing/Advertising	1.5%

Department/Function	
RESPONSE	Percent
Market Research	0.6%
Not Specified	0.6%
Operations/Production	4.8%
Other	3.9%
Planning	1.2%
Procurement/Sourcing	0.8%
Product Development/Design	0.6%
Public Relations/Communications	0.6%
Quality Control	1.5%
Research & Development (Product related)	0.6%
Sales/Business Development	3.6%
Supply Chain/Logistics	0.6%
Training	36.3%

n=1,448

Please indicate your organization's performance in the following areas:						
QUESTION	Not applicable	At an all-time low	Significantly worse	About the same	Significantly better	At an all-time high
Compared with the past five years, your revenue growth is...	13.7%	2.5%	9.0%	33.5%	33.2%	8.1%
Compared with the past five years, your market share is...	15.9%	0.9%	5.0%	42.8%	30.6%	4.8%
Compared with the past five years, your profitability is...	16.7%	2.4%	9.1%	33.9%	31.8%	5.9%
Compared with the past five years, your customer satisfaction is...	6.3%	1.0%	2.9%	47.7%	35.9%	6.3%

n=1,279

Total revenue for the entire organization worldwide (in US Dollars)	
RESPONSE	Percent
\$0-\$0.99 million	16.1%
\$1-\$1.99 million	4.1%
\$2-\$4.99 million	5.8%
\$5-\$9.99 million	5.8%
\$10-\$49.99 million	9.1%
\$50-\$99.99 million	6.2%
\$100-\$499.99 million	10.5%
\$500-\$999.99 million	7.4%
\$1-\$1.99 billion	7.2%
\$2-\$4.99 billion	9.9%
\$5-\$9.99 billion	3.7%
\$10+ billion	14.0%

n=484

Generally speaking, how would you gauge your organization's performance?	
RESPONSE	Percent
We're in bad shape	2.6%
We perform at below-average levels	12.6%
We're about average for our industry	30.5%
We're better than average	41.1%
We're in great shape	13.2%

n=190

*This question was only given to respondents who could not answer at least three categories from the previous question.

Organization type	
RESPONSE	Percent
Governmental	12.1%
Nonprofit	13.8%
Private (shares are not traded on the stock market)	45.2%
Public (shares are traded on the stock market)	28.9%

n=578

Country in which you are located	
RESPONSE	Percent
United States	80.7%
Canada	4.4%
Australia	0.4%
Bahrain	0.2%
Belgium	0.2%
Bolivia	0.2%
Brazil	0.2%
Bulgaria	0.2%
Colombia	0.4%
Costa Rica	0.5%
Egypt	0.2%
France	0.2%
Germany	0.4%
Ghana	0.2%
Greece	0.2%
Hong Kong	0.2%
India	1.9%
Ireland	0.4%
Italy	0.2%
Jamaica	0.4%
Japan	1.6%

Country in which you are located	
RESPONSE	Percent
Kenya	0.2%
Malaysia	1.1%
Mauritius	0.2%
Mexico	0.7%
Nigeria	0.2%
Oman, Sultanate of	0.2%
Pakistan	0.2%
Peru	0.2%
Philippines	0.2%
Portugal	0.2%
Romania	0.2%
Saint Kitts and Nevis	0.2%
Saudi Arabia	0.4%
Solomon Islands	0.2%
South Africa	0.5%
Sweden	0.2%
Switzerland, Cantons of	0.5%
Thailand	0.4%
Turkey	0.4%
Uganda	0.2%
United Kingdom	0.9%

n=565

Location of company headquarters	
RESPONSE	Percent
United States	75.1%
Canada	4.9%
Aruba	0.2%
Australia	0.2%
Bahrain	0.2%
Belgium	0.7%
Bolivia	0.2%
Brazil	0.2%
Bulgaria	0.2%
China, People's Republic of	0.2%
Colombia	0.2%
Costa Rica	0.4%
Denmark	0.4%
Egypt	0.2%
France	1.4%
Germany	1.4%
Ghana	0.2%
Greece	0.2%
India	1.6%
Ireland	0.2%
Italy	0.2%
Japan	2.1%
Korea, Democratic People's Republic of	0.2%

Location of company headquarters	
RESPONSE	Percent
Korea, Republic of	0.2%
Liechtenstein	0.2%
Malaysia	1.1%
Mexico	0.7%
Netherlands	0.9%
Nigeria	0.2%
Oman, Sultanate of	0.2%
Pakistan	0.2%
Peru	0.2%
Philippines	0.2%
Portugal	0.2%
Saudi Arabia	0.2%
South Africa	0.5%
Sweden	0.7%
Switzerland, Cantons of	1.1%
Thailand	0.2%
Turkey	0.4%
Uganda	0.2%
United Kingdom	2.3%
United States Minor Outlying Islands	0.2%

n=571

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