Ready-Now Leaders:
Meeting Tomorrow’s Manufacturing Talent Challenges

Global Leadership Forecast 2014 | 2015
Bigger Is Better

The Global Leadership Forecast 2014|2015

The Global Leadership Forecast 2014|2015 is the seventh report since Development Dimensions International (DDI) began this research in 1999. The current forecast—a joint effort of DDI and The Conference Board—includes survey responses from 13,124 leaders; 1,528 global human resource executives; and 2,031 participating organizations. To ensure that no individual organization dominated the overall results, a random sample was taken from any organization whose leaders comprised more than 1 percent of the global sample.

The record-breaking size of the participant pool gave us sufficient sample sizes so that we could look at our findings from many points of view. We were able to dissect findings based on diverse perspectives spanning leaders and HR professionals, four leader levels, gender, 48 countries across all regions, 32 major industry categories, and multinationals versus local corporations. Special topical reports and separate country reports will be available at www.ddiworld.com/glf2014.

About This Report

As part of the Global Leadership Forecast 2014|2015 study, this report highlights findings on the current state of leadership and leadership practices in manufacturing. The findings are based on survey responses from 3,143 leaders and 332 human resource executives in manufacturing organizations.

Throughout this report you will see findings for both manufacturing leaders and the global sample of leaders. Where the global results are presented, they will be accompanied by this icon to indicate that the findings are based on the global sample.

Unless accompanied by the global graphic, findings throughout this report can be assumed to be specific to manufacturing.

We are confident that these results will offer you new insights into manufacturing leadership practices, and we hope that it will stimulate your own ideas about how to enhance your organization’s leadership capabilities.

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Two Ways This Report Can Help Manufacturing Leaders and Their Teams:

1. Highlight the top talent-related barriers to revenue growth
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Manufacturing’s Weak Talent Supply Chain

What if a core component of a critical, high-demand product had an annual defect rate of 63 percent? You probably would be outraged and immediately ask:

1. How much does that increase my costs?
2. How much will sales decline?
3. How fast can I replace defective parts?
4. How can I reduce defects in parts for the long term?
5. What is the effect of defects on the rest of the supply chain?

Money Is Wasted on Talent Variance

An astounding 63 percent of leaders who participated in Global Leadership Forecast 2014|2015 report that their leaders are less than high quality or not ready for current or future challenges. Meanwhile, manufacturing companies chase tiny percentages of process gains only to waste enormous sums of money on the cost of talent variance. We call this the ninth form of waste for manufacturing: costs that add up when ineffective leadership skills fail to drive collaboration, problem solving, and innovation. When leaders are subpar, their lack of skills affects your production workers, engineers, mechanics, distribution—your entire talent supply chain. This gap has a negative impact on productivity and quality within all departments, adding rework cost due to poor interpersonal, problem-solving, change management, and innovation skills. Given the level of investment in automation, machines, and process standardization to which you are committed, **optimizing your talent supply and leadership pipelines is your best remaining strategy for improving productivity, quality, and competitiveness.**
Your Challenges and Why the Status Quo Won’t Work Anymore

Changing customers’ demands and complex supply chains require manufacturing companies to rethink processes and technology to make them more agile and innovative. In addition to changes in customer demand, manufacturers face serious skill shortages and an aging workforce. The lack of talent readiness and disruptions in talent supply weaken the talent pipeline. U.S. and global demographics indicate that the workforce is turning over, giving manufacturers a big opportunity to create competitive advantage quickly with new employees. So, it’s easy to see that manufacturing needs to rethink familiar paradigms.

The top three future talent challenges facing manufacturing are:

1. **A Weak, Reactionary Talent Supply Chain** characterized by filling positions in response to short-term talent needs rather than a long-term strategy to move the supply of talent to the speed of business. Ready talent in the right roles just when you need it.

2. **Poor Leadership Execution** of the crucial levers that move the needle on your strategy: customer focus, collaboration, capability building, and alignment across levels, functions, and countries.

3. **An Inability to Create, Drive, and Sustain a Culture of Ownership and Engagement:** Leaders at all levels in organizations lack the abilities, skills, tools, and systems that create an environment of engagement needed to fuel competitiveness in the new manufacturing economy.

Catalysts to Survive in Today’s Environment

You routinely manage and optimize vast networks of materials and resources. Talent optimization involves the same structure as that used by supply chains and logistics. You have the power to manage your talent, your biggest source of cost variance and productivity gains. Managing talent is similar to managing your product supply chain in terms of the quantity, quality, cost, and timing of talent movement through your organization. The ideal talent strategy is one with the right quality and quantity at a cost below target that arrives on time and with low variation. How can you make money leveraging your talent supply chain?

**Best-in-class manufacturing plants with high-quality leaders and talent practices have an additional $35,000 per employee and two more turns of inventory.**

The model on pages 6 and 7 describes what you need to do to reduce your talent cost variance and achieve best-in-class financial returns.

* DDI manufacturing study, forthcoming Spring 2015.
Manufacturing’s Talent Supply Chain

**Manufacturing Megatrends:** Global, macro-economic forces that are rapidly changing how manufacturing does business, as well as changing jobs at all levels.

**Demand:** The amount of your goods and services that buyers are willing and able to purchase. Changes in demand create the need for innovative and agile processes.

**Upstream Talent Supply:** Identifying and leveraging early-stage external sources of skills and abilities that are critical to future production system strategies that extend beyond typical sources.
**External Supply:** Best practice steps for acquiring high-quality new hires to add to your talent supply.

**Internal Supply:** Best practices to identify and accelerate the skills and abilities of existing employees to better meet megatrend demands.

**Talent Pipeline:** A critical business process that provides organizations with a sustainable supply of quality employees and leaders (at all levels) to meet the challenges of today and tomorrow.

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**Financial Returns From Talent Supply Chain Optimization**

**9x** Companies with high leadership quality and engagement are 9 times more likely to outperform their peers financially.

**3x** Top 20 percent of best financial performing companies are 3 times more likely to have VUCA capable leaders than the bottom 20 percent.

**2x** Companies that value leadership interpersonal and interaction skills have 2 times better financial performance.

**2x** Organizations with the best financial performance are 2 times more likely to use a systematic process for hiring.
Manufacturing Leaders Get Last Place

Leadership Quality Trends by Industry

Manufacturing

Percent of Leaders Rating Overall Leader Quality as High

37%

38%

41%

46%

46%

47%

59%

Finish

IT
Pharmaceuticals
Finance
Energy
Retail
Business Services
Health Care

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Manufacturing Is in Last Place, With Many Challenges, Few Leaders

Which industries have the best supply of leaders prepared to tackle their business challenges? We examined how various industries have changed in the past few years and what leadership readiness trends have emerged since 2011 to address this issue head on.

Manufacturing is at the bottom of the list for leader readiness to take on current and future challenges, according to 3,143 of their own leaders. Given that manufacturing is dealing with radical industry changes in technology, digitalization, and workforce demographics, jobs at every level are changing. Production team members’ jobs now require more STEM (science, technology, engineering and math) and problem solving skills. Leaders at all levels, especially first line supervisors’ jobs, are becoming incredibly complex, requiring them to: improve their interpersonal skills in order to align team members to changes in their production systems, coach to increasing performance demands, and drive effective problem solving to meet changing customer needs. All of these skills are becoming more and more scarce to find in the talent supply chain, given pending retirements and a lack of millennials filling opening jobs. Manufacturers without a sufficient supply of the right skills for production teams and leaders in the fast-changing technical environment risk meeting the customer demand, production numbers, and damaging customer loyalty.

Accelerating leadership quality impacts financial performance. Organizations with high leader quality were six times more likely to have top 20 financial performance. Positive leader experiences amplified the link between leader quality and financial impact greatly: Organizations with high levels of leadership quality and leader engagement/retention were nine times more likely to outperform their peers financially. Accelerating leadership readiness is a strong driver of leader quality. Organizations with higher-quality programs were 7.4 times more likely to have leaders who were highly engaged and inclined to stay with the organization, demonstrating how development programs positively shape a leader’s experience and, in turn, affect their engagement and retention.

How can you ensure the right practices are in place to help your organization be where you want it to be, both in leadership quality and financial success, in three years?

Indicates results that are based on the global sample.

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CEOs Think It Will Get Worse, Not Better

Conference Board CEO Challenges—Percent of Manufacturing Leaders Considering Themselves Very Prepared

Top Four CEO Challenges

- Human Capital: 27%
- Customer Relationships: 45%
- Innovation: 26%
- Operational Excellence: 33%
- Corporate Brand and Reputation: 41%
- Global Political/Economic Risk: 11%
- Government Regulation: 25%
- Sustainability: 27%
- Global/International Expansion: 17%
- Trust in Business: 43%
Megatrends Create Massive Changes for Leaders

Robotics. New markets. Increased digitization. 3-D printing. Changing customer demands. Increasingly complex supply chain requirements. E-commerce. These global changes are increasing both the appetite and metabolism of customer demand. What are the implications for manufacturing leaders and workers?

Workers will need to become more savvy mechanically, chemically, and electronically, according to a recent report.* Workers will need to read data, use digital technology, and increase their ability to change processes to meet future demand within tight budgets and time frames.

Leaders will need to adapt to increased customer demands efficiently and be more adept at using interpersonal skills to engage employees quickly in changes in strategy and the increasing technical demands of their jobs. Also, they must be able to use all data sources—people, processes, material, customer, and supplier—to solve business problems and redirect efforts efficiently.

Megatrends in manufacturing and the implications for human capital are top of mind for manufacturing CEOs. In The Conference Board CEO Challenge®, more than 1,000 respondents indicated that human capital remains their top challenge, with customer relationships rising in importance in the past two years. Also, operational excellence and innovation remain vitally important for driving business growth and ensuring a sustainable future. These challenges, albeit in varying order, were the top challenges in all four regions included in the survey: the United States, Latin America, Europe, and Asia.**

When asked about the strategies to address the human capital challenge, 4 of the top 10 strategies CEOs selected (see chart at right for all top 10) focus on leadership: improve leadership development programs, enhance the effectiveness of senior management teams, improve the effectiveness of frontline supervisors and managers, and improve succession planning. CEOs know their organizations cannot retain engaged, high-performing employees without leaders who can manage, coach, develop, and inspire their multigenerational, globally dispersed, and tech-savvy teams.

* Matson, E., & Prusak, L. (September 2010), Boosting the Productivity of Knowledge Workers, McKinsey Quarterly.


Indicates results that are based on the global sample.
Working Within the VUCA Vortex

Leaders Need More Preparation to Face VUCA Challenges

Percent of HR professionals who report that leaders are incapable of meeting the challenges of...

- Volatility: 43%
- Uncertainty: 30%
- Complexity: 37%
- Ambiguity: 32%

Competencies required for success in key leadership positions are clearly defined.
Leaders' performance expectations are linked to the organization's strategy.
Leadership competencies serve as the foundation for multiple leadership talent management systems.

Six Leadership Practices to Mitigate VUCA

- Leaders have high-quality, effective development plans.
- Leaders regularly review their development plan with their managers.
- Leaders practice and receive feedback on key skills with their managers.
Mega Trends in Manufacturing—Creating a VUCA World

A VUCA world is one that is volatile, uncertain, complex, and ambiguous. First used by the United States military to discuss preparedness, the term was popularized in the publications of Bob Johansen of the Institute for the Future.* This study measured leader readiness in four key areas from which we created a VUCA index:

V Anticipating and reacting to the nature and speed of change.
U Acting decisively without always having clear direction and certainty.
C Navigating through complexity, chaos, and confusion.
A Maintaining effectiveness despite constant surprises and a lack of predictability.

In The Conference Board CEO Challenge®, CEOs indicated that among their top pressing issues were these elements of the VUCA world in which they must navigate: economic stagnation in Europe, currency volatility, financial instability in China, labor relations, cybersecurity, volatility in energy markets, activist shareholders, and government regulations to address bribery and corruption.**

Less than two-thirds of manufacturing leaders said they were “highly confident” or “very confident” in their ability to meet the four VUCA challenges. As illustrated at left, this less-than-encouraging view is echoed by HR professionals, about a third or more of whom viewed their organization’s leaders as not capable of meeting the challenges of volatility (43 percent), uncertainty (30 percent), complexity (37 percent), and ambiguity (32 percent). At best, only about 18 percent identified their leaders as “very capable.”

Our research found that organizations whose leaders have high VUCA capability are 3.5 times more likely than organizations with low VUCA capability to have a strong leadership bench—that is, leaders ready to step in to meet future challenges. Also, VUCA capability links to financial results. The top 20 percent of organizations performing well financially are three times more likely to have VUCA-capable leaders than the bottom 20 percent.


What Stalls Acceleration?

Quality of Manufacturing Leadership over Three Global Forecast Studies

- Percent of leaders who say the overall quality of their organization’s leadership is high
- Percent of HR professionals who view their organization’s leaders as high-quality

41% 2009
35% 2011
37% 2014
No HR Rating 2009
25% 2011
24% 2014
Manufacturing Leaders Aren’t Ready to Deliver

Supply of High-Quality Future Leaders Has Stalled

Confidence in leader quality is not improving. Only 37 percent of leaders rated current quality as high compared to earlier studies (see illustration at left). In addition, according to HR professionals, the needle hasn’t moved at all. Only one in four organizations evaluated their overall leader quality as high, the same percentage as in our 2011 forecast.*

Why is leader quality going nowhere fast? Apparently, because leadership development efforts have stalled, despite an estimated expenditure of $50 billion a year on developing leaders worldwide.**

As in the last two forecasts, only 39 percent of leaders in the current study rated their organization’s leadership development program as effective, indicating no improvement over the past seven years. The overwhelming majority of leaders are still saying they are not satisfied with their organization’s development offerings. It’s no wonder that, with leaders reporting a lack of improvement in their development, we aren’t seeing an improvement in overall leader quality.

The outlook for future manufacturing leaders is even gloomier. Only 16 percent of these organizations rated their future bench strength as strong, a decrease from our last forecast (see illustration at right). Most manufacturing organizations are not confident that they have the leaders they need to address current and future needs.

So, what should manufacturers do to improve? The message from leaders is loud and clear: Organizations need to refocus their leadership development efforts.

Now What

.01 Start earlier. A focus on developing future talent begins with first line leaders. Provide learning experiences that require application with their production teams on the line.

.02 Apply it to problems on the job. Development efforts won’t have a lasting impact unless they are followed by opportunities for leaders to practice and use their newly acquired skills. Organizations that report their leaders practice and then receive feedback on key skills with their managers are five times more likely to have high leader quality and bench strength compared to those that don’t.

.03 Select for hard-to-train skills. Some skills, such as drive and innovation, are difficult to train. Strong leadership selection and succession systems also play major roles in driving leader quality for hard-to-train skills.


Organizations are not currently emphasizing development of some of the most critical skills that leaders will need to succeed over the next three years. The graphic below indicates this disconnect, splitting leadership skills into quadrants based on how low or high they were scored on two factors: criticality and focus. Those skills that were rated as most critical for the future appear in the right two quadrants; those in the bottom quadrant currently are being overlooked (low in focus).

**Some of the Most Critical Skills for the Future Are Still Not in Focus**

- **Building consensus and commitment**
  - Communicating and interacting with others

- **Leading across generations**
  - Developing strong networks/partnerships
  - Intercultural communication within international business environments
  - Integrating oneself into intercultural or foreign environments

- **Identifying and developing future talent**
  - Managing and successfully introducing change
  - Inspiring others toward a challenging future vision
  - Coaching and developing others

- **Fostering employee creativity and innovation**
  - Leading across countries and cultures
Manufacturing Leaders Aren’t Ready to Deliver

Time to Change Focus

As manufacturing leaders’ roles change to meet the influence of megatrends, there is a growing need for more skills and abilities in interpersonal relations, innovation, and data intelligence. Today, manufacturers also want to create a high-performance culture of growth and ownership in which everyone is engaged in executing new strategies to increase competitiveness. How important do HR leaders see these areas and how avidly are they focusing on developing them?

We asked HR professionals to rank skills according to how critical they are for leaders’ success in the next three years and how much their organization’s current development programs focus on them (see illustration at left). For many of these skills, the current focus corresponds with how critical they will be for the future (as less critical with less focus or more critical with more focus). But there are some notable exceptions.

HR currently is focusing heavily on two skills that they are not rating as critical for the future: Building consensus and commitment and Communicating and interacting with others. HR is either overemphasizing these or undervaluing them because they are foundational skills. On the opposite side of the illustration, two skills noted as most critical (Fostering employee creativity and innovation and Leading across countries and cultures) are not being focused on. These two skills were identified among the most critical in our last forecast, but HR still doesn’t focus on them in their leadership development programs. As a result, leaders have not improved.

Only one in three organizations currently is focused on developing their leaders’ ability to foster innovation; only one in five is emphasizing development in global leadership. Though both skills are critical, HR hasn’t implemented development initiatives that focus on them. Only one-quarter of leaders reported being effective in leading across countries and cultures, the lowest single skill effectiveness rating in our survey (see illustration at right). Multinational organizations that rely on their leaders to drive global growth should not overlook this skill gap. Similarly, with only 42 percent of leaders currently effective, fostering innovation is a skill area that deserves attention. Innovation has emerged as one of the top challenges for businesses; having leaders able to encourage innovation and creativity is vital if they are to lead in competitive markets.

Do manufacturing operations benefit from investing in building leaders’ skills in these critical areas? The answer is a resounding yes. We found that organizations that have been focusing on developing skills, such as communicating, building commitment, and coaching, have leaders who are more effective and are three times more likely to rank in the top 20 percent of financial performance. Critical skills such as these are essential to implementing new production lines, improving inventory turns, safety, and efficiency.

Now What

.01 Design development programs around the skills your leaders need to succeed. The most critical skills are those that help them accomplish strategic objectives.

.02 Multinational companies, in particular, should emphasize development in global leadership skills to prepare their leaders to meet intercultural challenges and drive global growth.

.03 Innovation, a top Conference Board CEO challenge, can be influenced directly by leader behavior. Look for leaders who possess the skills to encourage risk taking, networking, and generating new ideas.

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Activate Your Leadership Talent Supply

Targeting the Right Size Pool to Maximize High-Potential Engagement and Retention

- Engagement/Retention: 45% Lower
- 5%-10% High Potentials
- Engagement/Retention: HIGHEST
- 15%-30% High Potentials
- Engagement/Retention: 33% Lower
- 35%+ High Potentials
If Everyone’s Special, No One Is

While many production leaders are brilliant engineers or have highly thought of technical skills, they may not be truly “high potential” or someone who someday will run the operation to meet mass individualized customer needs or execute “extreme lean.” The truth is that some leaders are above average on leadership skills required to build an organization and some are just good technical experts in current roles. Identifying truly high-potential leaders is a daunting task. Even more challenging is creating an environment that allows developing leaders to achieve their potential while still retaining them within the organization.

The illustration at left encapsulates the dilemma that organizations face when they have too many or too few high potentials. Organizations with a larger pool of high potentials (35+ percent) risk lower levels of engagement and retention (33 percent) than those with a smaller pool (15–30 percent), likely because the additional resources focused on the former leaders are spread too thin.

Meanwhile, organizations with too few high-potential leaders (5–10 percent) have an even greater risk of generating lower retention and engagement rates (45 percent).

Of the manufacturing organizations we studied, 74 percent reported that they have programs for identifying and developing high-potential leaders with, on average, 15 percent of their leaders identified as “high potentials.” As depicted in the figure at right, an overwhelming majority of those with high-potential programs indicated that they hold senior management accountable for identifying and developing high-potential leaders (91 percent). They report a widespread use (80 percent) of objective assessment data regarding high-potential capabilities, potential, and readiness. Also, more often than not, they report that high potentials’ performance during developmental assignments is carefully evaluated (68 percent), yet only a little more than half noted that a priority is placed on measuring the effectiveness of their development programs.

Quality high-potential programs that are strongly supported can mean the difference between retaining or losing a high-potential leader. Roughly half (54 percent) of the leaders who responded were considered high potentials. When asked about their level of engagement, those with weakly supported programs were twice as likely to indicate an intention to leave within 12 months (16 percent). Only 8 percent of those with strongly supported programs (half as many) indicated an intention to do the same.

Indicates results that are based on the global sample.
Address Early and Late Career Talent Supply Problems

Higher Growth, Higher Percentage of Millennials

30% 25% 21%
Aggressive Growth Cautious Growth No/Minimal Growth

Organizations’ Pace of Growth
Moving Up Faster

The retirement of the baby-boom generation will leave a huge talent hole in many manufacturing organizations. These retirees hold the keys to current customer and supplier relationships. Add to this the changing nature of production and first-line leader, middle manager, and executive jobs, and it’s easy to see that many jobs will go unfilled.

Who will fill in all those empty leader slots in manufacturing companies? The upcoming Millennial generation? What can manufacturing learn about Millennials and how to attract them? Aggressive-growth organizations, such as those in the high-tech industry, have a significantly higher proportion of Millennials* (30 percent) in leadership positions than organizations with cautious growth (25 percent) or no to low growth (21 percent). (See the illustration at left.) However, organizations that rely on a greater supply of younger leaders face unique challenges. Millennials report being less engaged in their roles. Also, they are more likely to intend to leave in the next 12 months than their predecessors, creating huge retraining costs most manufacturing companies would want to avoid.

Millennials have a stronger preference for using social learning (e.g., social networks, wikis, and blogs) and mobile development (e.g., smartphones or tablets) for improving leadership skills than other generations, and they tend to learn from others more frequently. Given their preferences, Millennials may seek out more frequent opportunities to learn from others via social and virtual platforms, something organizations need to keep in mind as they work to fill the retiree gap with Millennials.

Millennials also seem to receive a significantly higher percentage of promotions than do any other generation. This could be attributed to two factors: 1) They are starting at lower management positions with more opportunity for advancement, or 2) organizations could be reacting to Millennials’ reputation for readily changing jobs. Either way, the good news is that they are stepping up.

* The generally accepted definitions of “Millennials” and “Generation X” are as follows: “Millennials” were born between 1982 and 2000; “Generation Xers,” between 1965 and 1981.

Now What

.01 Leverage technology as an asset. Appeal to millennials by providing them with a greater understanding of the technology they will be using through robotics, 3D printing, supply-chain technology, social media, etc.

.02 Fix your brand. Change your employee value proposition and focus on what you can offer that millennials value. Offer them flexible schedules and demonstrate a career path that will appeal to moving up and around in the organization.

.03 Integrate social and mobile learning into development programs. For example, build virtual learning platforms and provide opportunities to connect with others, both virtually and in person.

Indicates results that are based on the global sample.
Hire For Maximum ROI

Forward-Thinking Organizations Use a Systematic Process for Hiring

...Yesterday

Top 20% Financial Performance

Bottom 20% Financial Performance

Tomorrow...

Percent that Use a Systematic Process (e.g., Strategic Talent Planning) to Identify the Quantity and Quality of Leadership
Are You Hiring for Maximum ROI?

You want to take advantage of the market upswing for manufacturing and increase productivity and revenue. Yet, your plants and operations are facing a lot of talent risks. As noted in the talent supply chain illustration on page 6, your operations are likely facing a large retirement bubble or shortages of the right leaders. Or, you may be spending hundreds of millions of dollars on a plant startup or expansion and looking for premium leaders to turn that investment into revenue on a grueling timeline. How can you improve your odds of having effective leaders? Whether you are in an existing operation or in a plant startup, hiring practices are likely the single most important source of future revenue.

Top performing companies have 2.2 times greater financial performance and take a very proactive approach to replacing retirees and hiring new leaders as their operations grow. (See illustration on the left.)

Are you using a systematic process to hire leaders who possess the right skills and disposition to meet your business demands, or are you leaving hiring ready now leaders to chance? Only half of manufacturing companies we surveyed are leveraging a systematic process (e.g., strategic talent planning) to identify the quantity and quality of leadership required to drive future business success. What are the financial benefits companies with an effective hiring process achieve?

Manufacturers that do use a systematic process have:

- 18 percent more leaders ready to fill critical roles, which means they have fewer open positions, fewer delays to productivity, and reduced hiring costs.
- 4.4 times better development (that is, more likely to have high-quality leadership development), which means less scrap learning.
- 1.2 times better leadership experience (that is, more likely to have high leader engagement/retention), which means improved speed-to-productivity and reduced turnover costs.
- 4.4 times leadership strength (that is, more likely to have high leadership quality and bench strength), which means more ready leaders who can improve customer satisfaction, increase productivity, and reduce turnover costs.

Now What

.01 Identify the specific behaviors, skills, and motivations that are unique to your operations’ future. Build a future-focused success profile that defines readiness. Determine which of these behaviors are easily trainable and which are not. A selection system that focuses on hiring for the difficult-to-train behaviors and attributes will ensure you get the best performing leaders and reduce training costs.

.02 Use a robust election system to drive the best hiring decisions. A system that uses multiple assessment tools to screen candidates early in the process, and then provides simulations of how your candidates can actually demonstrate your unique behaviors, skills, and motivations will give you the best data to use for making critical leadership hiring decisions which lead to the best financial results.

.03 Do not let technical skills alone drive hiring decisions. Technical skills easily become obsolete, providing only short term gains. Long-term success comes from leaders who can learn and can demonstrate and drive effective communication of the vision, coaching, collaboration, delegation, and decision making.

.04 Use the selection system consistently. Inconsistent use of the selection practices lead to favoritism and legal challenges.
Reap the Rewards of Gender Diversity

Organizations with Better Financial Performance Have More Women in Leadership Roles

- Bottom 20% Financial Performance:
  - 19% of all Leaders are Women
  - 8% of all Leaders are High-Potential Women

- Top 20% Financial Performance:
  - 37% of all Leaders are Women
  - 12% of all Leaders are High-Potential Women

Indicates results that are based on the global sample.
A Talent Supply Answer That Drives Performance: Women

Looking to increase your supply of ready leaders? Look to women as a source of talent. Women make up only 27 percent of the workforce in manufacturing, the lowest level since 1971. In the U.S., while women represent nearly half of the labor force, they only constitute a quarter of the manufacturing workforce’s 12.2 million jobs, according to the U.S. Bureau of Labor Statistics.* Women’s share of manufacturing jobs peaked in the early 1990s, and remained mostly unchanged until the recession. Since June 2009, men regained more than 500,000 jobs, while women lost another 52,000, according to a report from the National Women’s Law Center in Washington.**

There was no significant difference between the men and women in our study regarding leadership skills or ability to handle management and business challenges. Yet, women remain underrepresented in higher levels of leadership globally. What explains this imbalance?

One of the few significant differences between the sexes was how they rate themselves. Men rated themselves higher, considering themselves more effective as leaders (highlighted in the illustration at right). Women were less likely to rate themselves as highly effective leaders compared to their peers on challenging leadership tasks, such as, managing international assignments, leading across geographies or countries, and most significantly, leading geographically dispersed teams. Missing out in these key developmental opportunities makes a difference: Leaders who had access to these global and more visible leadership experiences were far more likely to be promoted and to advance more quickly in their organizations.

Having women in the leadership pool pays off for organizations where 30 to 40 percent of leadership roles are held by women. The difference between top and bottom financial performers is clearly illustrated at left. Organizations in the top 20 percent of financial performance counted 37 percent of their leaders as women; among organizations in the bottom 20 percent, only 19 percent of leaders were women. The same trend emerges in the percentage of leaders who were high-potential women: Among organizations in the top 20 percent for financial performance, a statistically significantly higher percent of leaders were high-potential women (28 percent).

Now What

.01 Consider an aggressive recruiting strategy for women who are astute in STEM and leadership skills.

.02 Find international assignments for leaders, especially women, and encourage women to take on global leadership roles.

.03 Strongly supported mentoring programs can play a key role in helping develop and prepare new leaders, women in particular. Women who have achieved senior leadership roles overwhelmingly report how critical mentorship was in helping them advance and grow in their careers.***


*** Neal, S., Boatman, J., and Miller, L. (2013), Women as Mentors: Does She or Doesn’t She? A Global Study of Businesswomen and Mentoring, Pittsburgh, PA, Development Dimensions International.
Dig a Deeper Pipeline

Talent Management Practices That Affect the Percent of Ready-Now Leaders

- Feedback on Key Skills given to leaders (15%)
- Leadership competencies are Clearly Defined (11%)
- Leader competencies serve as the foundation for Multiple Leadership Talent Management Systems (12%)
- Leader performance expectations linked to Organization’s Strategy (15%)
- Systematic Process to determine required leadership skills (8%)
- Managers Regularly Review leaders’ development plans (13%)
- Formal programs to ensure Smooth Leadership Transition (10%)
- High-quality, effective Development Plans (18%)
- Omission Impact: Not doing these = negative impact
- Action Impact: Doing these = positive impact
Accelerate Talent Supply and Reduce the Risk of Shortages

Many manufacturers are looking at their current workforce and, given retirements, retention, and skill sets, wondering where their future Plant Managers or Regional VPs of Operations will come from and are coming up short. The answer is to look earlier and deeper into the Production Supervisor ranks for future Plant Managers, as an example, and accelerate their exposure to larger parts of the operation, the supply chain, and customer requests. Doing so pays off. Organizations that fill a larger percentage of their positions internally have significantly higher leadership strength and have three times better financial performance than organizations that don’t. But that’s easier said than done. Across our entire sample, less than half (46 percent) of critical positions could be filled immediately by internal candidates, on average.

If a full, capable bench would increase your competitive edge and reduce costs, what are the best ways to increase your odds to attain that goal? We found that two types of talent management practices were closely linked—but in different ways—to the key metric of percent of critical positions that can be immediately filled by internal candidates. These practices are shown in the illustration at left. On the left side of the tree are the practices that affected this metric through omission; that is, organizations that took these steps were still only average in their ability to fill critical positions, but those that failed to do them fell far behind their peers. The percentages in the leaves show how much the metric changes when these practices are not done. Notice that there are a few common characteristics among them. They deal with defining and providing feedback on competency skill targets for leaders, broadly using these competencies, and aligning leadership performance expectations with organizational strategy.

The practices on the right side of the tree affected organizations’ ability to fill critical positions through action. Companies that failed to take these steps were only average, but those that took them boosted their bench strength noticeably compared to others (indicated by the percentages in the leaves). These practices deal with forward-facing systems and processes and a future orientation for both individuals and organizations: determining leader skills linked to success, ensuring that leader development plans are high-quality and regularly reviewed, and facilitating smooth transitions among leadership roles.

Now What

01 Focus on the readiness of your bench. Institute, reinforce, and systematize the talent management practices on the left side of the tree.

02 Differentiate your organization by aggressively pursuing the actions on the right side of the tree. These future-oriented practices have a clear association with a stronger bench.

03 Make talent supply a lean process. Develop a repeatable process with metrics that senior management values. In particular, focus on these three practices that are not often done well but which have a large payoff: putting programs in place to ensure smooth transitions from one leadership level to the next (only 37 percent of organizations do this well); building high-quality development plans for leaders (38 percent); and ensuring regular reviews of these development plans (49 percent).
Drive Employee Development, Retention, and Engagement

Strongest Influences on Employee Development Focus, Retention, and Engagement

- Employee Development Focus
  - Executives Committed to Developing Leaders
  - Receives Information About Competencies and Skills Needed for Success

- Retention
  - Manager Is Effective at Developing Me
  - Work-Life Balance

- Engagement
  - Advancing Upward
  - Clear Career Path
  - Opportunities to Give Feedback on Strategy and Culture
  - Up-to-Date Development Plan

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Focus on the Overlap

Employee engagement is now “table stakes” for most industries, including manufacturing. An alarming trend in conversations with manufacturing operations is that workers and their leaders are not showing up to work, committed to delivering their best performance, causing serious implications for manufacturing’s lean and growth strategies. How can manufacturing operations increase their leader engagement?

We found strong links between several such experiences and three outcomes: Engagement (the leader’s active involvement in the job); Employee Development Focus (the leader’s active pursuit of opportunities to develop their employees), and Retention (the leader’s intent to remain at the organization long-term). When everything cannot be a focus, organizations need to know which experiences most shape which outcomes to prioritize targeted leadership development practices.

We analyzed the links between the experiences of more than 13,000 leaders and these three outcomes to define more precisely what experiences matter most. The figure at left summarizes our findings, with each outcome represented by an overlapping circle. Experiences in each circle are top drivers of that outcome; experiences in areas where the circles overlap are drivers of multiple outcomes. Two factors stood out as heavy influences across all three outcomes: understanding one’s career path and having opportunities to provide feedback to senior leaders about the organization’s strategy and culture.

We also looked for signs of differences by leader level. Across all levels we found a nearly identical ordering of which experiences drive which outcomes, with one important exception. For Engagement, frontline leaders were heavily influenced by “Advancing Upward.” This makes perfect sense because front-line leaders are early in their careers and anxious to climb the ladder. On the other hand, “Manager Is Effective at Developing Me” had a stronger impact for higher-level leaders. This suggests that, although fewer advancement opportunities are available at higher levels, the development focus and their manager’s actions continue to shape engagement for mid- through senior-level leaders.

Most of the experiences listed have substantial room for improvement based on the views of the leaders in our research. Only 37 percent of leaders reported having an up-to-date development plan linked to Engagement and Employee Development Focus. All other experiences were agreed to by about half, with an exception for having a clear career path (66 percent agreement).

Now What

.01 Work inward-out when prioritizing efforts to improve leader experiences. Start with the experiences at the center of the figure; these influence all three outcomes. To further target certain outcomes, address those on the outer portions of the graphic.

.02 Revisit the availability and awareness of processes for leaders to understand and plan their career development. Consider opportunities for them to share feedback with senior leaders about the strategy and culture. These experiences are often under-communicated or lack credibility for leaders because of poor follow-through in the past.

.03 When informing leaders about what they need to be successful, detailed information (e.g., specific skills, behaviors, and actions) has more impact on outcomes than general information about higher-level domains or ill-defined competencies. Evaluate the specificity of your competency models and the outputs of associated assessment and development programs to make sure they provide the level of precision leaders are seeking.
Interact, Don’t Manage

How Learning and Development Can Boost Your Talent Supply

Leaders’ Balance of Time—Actual, Preferred, and Company Valued

- Actual: 41% Managing, 33% Equal, 26% Interacting
- Preferred: 22% Managing, 37% Equal, 41% Interacting
- Company Valued: 45% Managing, 32% Equal, 23% Interacting

Practice makes perfect!
We found that leaders who spend more time interacting are more effective at these skills:
- Coaching and Developing Others
- Communicating and Interacting with Others
- Developing Strong Networks/Partnerships
- Fostering Employee Creativity and Innovation
- Identifying and Developing Future Talent
Where Should Leaders Be Spending Their Time?

Manufacturing leaders typically focus on the technical side of the operation and often get into fire-fighting mode, solving problems themselves. When this occurs, they are spending their time opposite of how they should be. That is, leaders are managing reactive issues themselves rather than using coaching interactions to work through others.

Interacting is far more critical to successful leadership than is managing. In a McKinsey Quarterly article, the authors wrote that the quality of interactions has the potential to create durable, competitive advantage, and aptly label the ability of leaders to leverage conversations as relationship capital.*

We found that leaders currently spend, on average, 41 percent of their time managing (see the figure at left). In part, this is due to a perception among leaders that their organization’s senior leaders place more value on managing abilities than on interpersonal relationships. Leaders would prefer to spend twice as much time interacting with workers and other leaders and much less time managing.

There is a high cost to organizations when leaders spend too little time in dialog with others. A heavier focus on managing leads to less job satisfaction, higher turnover, and lower engagement among leaders. Not talking to people also means opportunities are missed to understand work issues and build others’ capability to solve problems. If organizations signaled that time spent interacting was as valuable as time spent managing, they likely would have a stronger leadership bench strength, which in turn leads to superior financial performance.

DDI has evaluated thousands of leaders using a highly valid assessment center process. In simulated leadership environments, we assess a wide range of competencies, but also focus on key interaction skills:

- Maintains or enhances self-esteem.
- Listens and responds with empathy.
- Asks for help and encourages involvement. (to enhance collaboration)
- Shares thoughts, feelings, and rationale. (to build trust)
- Provides support without removing responsibility. (to build ownership)
- Facilitates discussions.

Leader performance on these interaction skills is sorely lacking, with less than one in three displaying high proficiency.** Not surprisingly, senior managers perform as poorly as new frontline leaders.

* Matson, E., & Prusak, L. (September 2010), Boosting the Productivity of Knowledge Workers, McKinsey Quarterly.

Avoid Scrap Learning

What Is Getting in the Way of Learning? Leaders Said...

Barriers to On-the-Job Learning
- Poor post-learning feedback from manager
- Weak connection to personal development plans
- Not enough opportunities to apply the learning
- Not being held accountable for using the learning
- Low relevance to business challenges
- Low relevance to the job

Barriers to Formal Learning
- Low relevance to the job
- Not enough opportunities to apply the learning
- Low relevance to business challenges
- Weak connection to personal development plans
- Not being held accountable for using the learning
- Poor post-learning feedback from manager
Crafting a Better Learning Experience

Any operation focusing on Lean emphasizes taking waste and “scrap” out of the operation. Yet, manufacturing leaders may produce scrap by not holding learners accountable for applying learning to the operation.

Yet, manufacturing leaders may produce scrap by not holding learners accountable for applying learning to the operation. Learning that doesn’t work and doesn’t get applied is “scrap learning,” a type of waste that you want to eliminate and avoid. But what makes learning work? What holds it back? All types of leadership learning have the same goal—sustained improvement of leader behaviors. But the route to achieving this goal takes a more circuitous path for some types of learning. We found a surprising pattern when we compared leaders’ reports of the most common barriers to formal learning (training courses, diagnostic assessments, books/articles, etc.) with those to on-the-job learning (shadowing others, networking, developmental assignments, special projects, etc.): The barriers aren’t uniform. In fact, they are nearly exactly opposite. The factor most likely to hold leaders back from stronger development resulting from on-the-job learning—that is, poor post-learning feedback from one’s manager—is rarely a barrier in formal learning. The top two barriers to formal learning—low relevance to the job and to business challenges—typically are strengths for on-the-job learning.

The figure at left illustrates this contradictory pattern clearly, listing six common barriers rated by leaders. Notice that what works best for one form of learning is not what works best for the other. However, there is a promising way to view this pattern: Organizations know how to provide learning with recognized relevance, and that is rarely a barrier for on-the-job learning. They also know how to reinforce learning experiences with manager feedback, which is rarely a barrier for formal learning. In other words, organizations are demonstrating the use of the tools, processes, and information needed to ensure both relevance and post-learning manager support.

What’s missing, however, is the application of this knowledge across the range of learning methods. As a result, learning experiences are too often squandered and considered only in isolation rather than as a planned sequence integrating on-the-job and formal learning opportunities. By viewing on-the-job learning more like formal learning and formal learning more like on-the-job, organizations will be better able to leverage the distinct strengths of both forms, thus generating stronger development outcomes for leaders and value for the business.

Now What

.01 Managers of learners, by connecting learning to job and business needs and by reinforcing it after it occurs, are key to converting learning to behavior change. Hold them accountable for doing so.

.02 For formal learning, stay vigilant for how changes in organizational strategy should dictate changes in the learning’s focus and how it’s positioned to leaders. Don’t assume leaders will spot relevance automatically. Clarify these links with both the learner and his or her manager and quickly rectify any lack of perceived relevance.

.03 To increase relevance, tie both formal learning and on-the-job coaching to problem solving. For example, if a new work process has just introduced a new safety problem, let learners apply new skills to address this problem during training. Ensure follow-up coaching aligns with that learning and drives on-the-job application.

.04 Stop viewing—and allowing leaders to view—on-the-job and formal learning as distinct events. See them as counterparts in an integrated learning journey, using formal learning to build structure, planning, and reinforcement around on-the-job learning to better convert informal learning experiences into sustained changes in leader behavior.

.05 Measure the impact of your learning programs to see whether you are getting improved performance or just scrap learning. If your development programs are wasted as scrap learning, diagnose which barriers may be present and revise your program or its implementation approach.
How Do HR Professionals Contribute to Business?

19% Anticipator
Uses data to predict talent gaps in advance; provides insights about how talent relates to business goals.

61% Partner
Openly exchanges information with the business about current issues; collaboratively works toward mutual goals.

20% Reactor
Ensures compliance with policies/practices; responds to business needs by providing tools/systems when asked.
Get Strategic, Sooner

The relentless pace of change in manufacturing will drastically change roles and skills. Manufacturing needs HR to anticipate these changes and their implications and act proactively. Yet, only one in four HR executives reported participating early in strategic planning. The other three either were not involved or were asked to develop talent plans after the strategic planning process.

HR’s role needs to continue to evolve. For at least two decades, the challenge for HR was to move from being administrators or reactors to being business partners. HR units worldwide have made that shift. As shown in the illustration at left, 61 percent of our HR sample classified themselves as “partners.”

Now it’s time for HR to take on a new role we call “anticipator.” Anticipators are always looking for what might come next. They work with the business to predict future talent gaps, and then strive to close the gap. They are able to proactively advise leaders on the probability of their strategies succeeding based on the availability and quality of talent. However, as the illustration at left shows, fewer than 2 in 10 HR professionals place themselves in the anticipator category.

We also examined when HR gets involved in the strategic planning process—early, late, or not at all. As the illustration at right shows, anticipators are far more likely than partners or reactors to be part of their organization’s strategic planning process. That involvement pays off big for their organizations, which are three times more likely to have stronger leadership bench strength and are more than six times more likely to have exhibited strong financial performance than organizations in which HR’s involvement in the planning process occurs late or is nonexistent.

While anticipators and partners are likely to use similar leadership practices, anticipators do six things differently than partners or reactors. Anticipators:

• Focus strongly on programs that foster employee creativity and innovation.
• Are more likely to position leadership development as an integrated journey rather than a collection of events.
• Are more likely to institute negative consequences for managers who fail to develop their leaders.
• Help ensure that a higher percentage of leaders are promoted from within.
• Help leaders be ready to meet the CEO challenge of human capital.
• Are much more likely to use advanced workforce analytics, particularly those that involve forecasting future talent needs.

Indicates results that are based on the global sample.
Leverage Talent Analytics

The Misguided Flow of Leadership Analytics

More Use, Weaker Financial Impact

- Gathering efficiency and reactions metrics about leadership programs (30%)
- Benchmarking leaders against their peers within the company (27%)

Less Use, Stronger Financial Impact

- Gathering results metrics about leadership programs (24%)
- Using data to forecast future leadership talent needs (23%)
- Gathering business impact metrics about leadership programs (21%)

What Percent of Organizations Are Doing Leadership Analytics Well?
Want A Significant Increase In Productivity? Leverage Talent Analytics

Research conducted in 2014 by The Conference Board found that Big Data Analytics was the number one “hot button” issue for CEOs. In manufacturing, analytics is one of the top five go-to strategies for addressing changing customer needs and tightening more complex supply chains, meaning while Big Data is hot at the same time, executives have not yet realized the potential of analytics. Most manufacturing executives tend to leverage benchmarking statistics, but is that the best form of analytics to run their operations? However, Analytics was only number 19 (out of 22) in importance as a strategy to address the top CEO challenge (Human Capital), meaning while Big Data is hot at the same time, executives have not yet realized the potential of analytics. Most manufacturing executives tend to leverage benchmarking statistics, but is that the best form of analytics to run their operations? At the same time, these same executives have not realized the potential of analytics.

To better understand the gap between talent analytics practices and recognized value to the manufacturing plant or business unit we focused on several forms of leadership analytics, ranging from basic to advanced. We wanted to find out how often each was being done, how well it was being done, and most importantly, which forms of analytics link to financial outcomes. With these links we could see how well organizations are responding to—or failing to respond to—value-added analytical insight for their talent.

We found that 47 percent of organizations don’t do any form of leadership analytics well. Only 1 in 20 does all forms well. The most typical or common form of analytics for manufacturing is benchmarking, yet, this common form of analytics actually results in less financial return than other, less commonly used analytics. In the illustration at left, the forms of analytics more often used are on the left; less commonly used forms are on the right. Manufacturing companies that want to increase financial performance should be using those on the right because they correlate most significantly with external financial metrics.

Now What

.01 Recognize talent analytics as an opportunity to apply previously underutilized talent, production, quality, safety, turnover, and engagement data.

.02 Apply the same level of manufacturing rigor to getting the most out of your talent and avoid the ninth form of waste: talent variance. Use talent analytics to determine your largest sources of talent variance. Use the results of your talent analytics to reduce turnover, lost-time accidents, and absenteeism and to increase productivity, quality, and safety.

.03 Direct your organization’s efforts toward future-focused and business-centric analytics that generate foresight about talent gaps and drive talent alignment with strategic goals. These are, without question, more complex and resource-intensive, but they will help connect talent data to production and quality metrics as a cross-enterprise business imperative, converting talent data to financial impact.

Indicates results that are based on the global sample.

* Matson, E., & Prusak, L. (September 2010), Boosting the Productivity of Knowledge Workers, McKinsey Quarterly.

# Appendix: Demographics

## Organization Characteristics

<table>
<thead>
<tr>
<th>Industry</th>
<th>Number of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>34% Industrial Manufacturing</td>
<td>5% 1–200</td>
</tr>
<tr>
<td>20% Automotive &amp; Transport</td>
<td>15% 201–500</td>
</tr>
<tr>
<td>17% Food</td>
<td>12% 501–1,000</td>
</tr>
<tr>
<td>14% Consumer Products Manufacturers</td>
<td>25% 1,001–5,000</td>
</tr>
<tr>
<td>13% Chemicals</td>
<td>12% 5,001–10,000</td>
</tr>
<tr>
<td>3% Beverages</td>
<td>11% 10,001–20,000</td>
</tr>
<tr>
<td></td>
<td>12% 20,001–50,000</td>
</tr>
<tr>
<td></td>
<td>9% 50,001 or more</td>
</tr>
</tbody>
</table>

## Presence in Global Market

- 23% National
- 77% Multinational (own, operate, or have affiliate offices outside own country)

## Leader Characteristics

<table>
<thead>
<tr>
<th>Leader Level</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>33% First-level leader</td>
<td>0% Less than 25</td>
</tr>
<tr>
<td>35% Mid-level leader</td>
<td>21% 26–35</td>
</tr>
<tr>
<td>28% Senior or Higher-level</td>
<td>43% 36–45</td>
</tr>
<tr>
<td>4% Executive or Senior-level</td>
<td>28% 46–55</td>
</tr>
<tr>
<td></td>
<td>6% 56–60</td>
</tr>
<tr>
<td></td>
<td>2% Over 60</td>
</tr>
</tbody>
</table>

## Gender

- 79% Male
- 21% Female

## Generation

- 7% Millennials
- 77% Generation X
- 16% Baby Boomers

## Organizational Tenure

- 5% Less than 1 year
- 27% 1–5 years
- 22% 6–10 years
- 16% 11–15 years
- 30% More than 15 years
3,143 Leaders
332 Organizations
48 Countries
About DDI’s Center for Analytics and Behavioral Research

The Global Leadership Forecast 2014|2015 is part of the continuing series of trend research conducted by DDI’s Center for Analytics and Behavioral Research (CABER). CABER’s publications are designed to produce actionable, evidence-based insights to advance knowledge of current and emerging talent management topics such as leadership development, succession management, and talent acquisition.

CABER also conducts, coordinates, and champions analytical research with DDI’s clients to benchmark, evaluate, forecast the effects of, and optimize their talent management practices toward the goal of prescriptively aligning talent readiness with business objectives. CABER’s research, including this report, is available at www.ddiworld.com.

About Development Dimensions International (DDI)

Who We Are. Development Dimensions International (DDI) is the world’s premier talent management consultancy. Forty-five years ago, we pioneered the field; today we remain its chief innovator.

What We Do. We help companies transform the way they hire, promote, and develop their leaders and workforce. The outcome? People ready to instigate, understand, and execute business strategy and address challenges head-on.

How We Do It. If you have ever had a leader you revered or marveled at how quickly a new hire came up to speed, you might very well be experiencing DDI at work. Often, we are behind the scenes, creating custom training or assessments that clients can roll out on their own. Other times, we are more visible, helping clients drive big changes in their organization. Always, we use the latest methods, based on science and the test of time.

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About The Conference Board

The Conference Board is a global, independent business membership and research association working in the public interest. Our mission is unique: To provide the world’s leading organizations with the practical knowledge they need to improve their performance and better serve society.

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We conduct research and convene business leaders in forums large and small, public and private. The insights captured through our extensive network feed directly back into our research and meeting agendas, ensuring that our activities remain sharply focused on the key issues of the day.

The Conference Board works within and across three main subject areas—Corporate Leadership, Economy & Business Environment, and Human Capital—to create a unique, enterprise-wide perspective that helps business leaders respond today, anticipate tomorrow, and make the right strategic decisions every day.
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About Development Dimensions International

Development Dimensions International, or DDI, is one of the world’s top talent management consultancies. Forty-five years ago we pioneered the field; today we remain its chief innovator. We help companies transform the way they hire, promote, and develop their leaders and workforces. The outcome? People ready to initiate, understand, and execute business strategy and address challenges head-on. We’ll help you from one of 42 wholly-owned or closely affiliated offices delivering to more than 90 countries. We have the experience and infrastructure to ensure projects run efficiently, are scalable, and deliver exceptional results around the world.

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Optimizing your talent supply and leadership pipeline is your best remaining strategy for improving productivity, quality, and competitiveness. Our expertise and experience in designing and implementing talent solutions—from developing more than 50,000 leaders worldwide each year and establishing more than 200 startups to our work with the top manufacturers—can help you to:

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• Develop and accelerate leadership capability across your leadership pipeline.
• Accelerate culture change for enterprise-wide results.

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