



Talents' Management in a Connected World

February/2009

PRICEWATERHOUSECOOPERS 

Schedule

The present organizational context – CEOs' view

Emergent markets expectations

Strategies to deal with the challenges of talents' management

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The present organizational context – CEOs' view

PwC's CEOs Global Survey



- The PwC's CEOs Global Survey has the purpose to examine how CEOs realize the business context in which they are operating and how a connected world may affect companies' success.
- This is our 12th edition and the methodology used follows exactly the same standards as previous editions.
- From September to December 2008 were realized 1.124 interviews with CEOs in 50 countries.
- The collected informations were analyzed by PwC's specialists and presented in Davos, at the Annual Global Economic Forum.

The present organizational context – CEOs' view

PwC's CEOs Global Survey - 2009

- The present organizational context analysis' should consider:

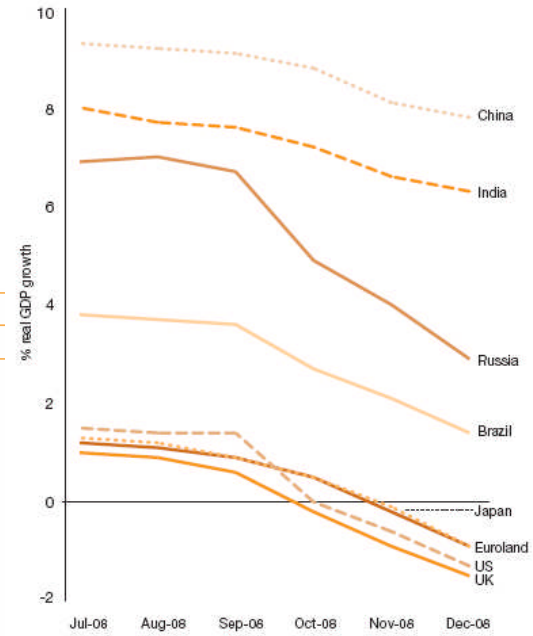
- Short terms cenarios.
- The macro tendencies which draw organizations' transformation for the next years.



Q: How would you assess your level of confidence in prospects for the revenue growth of your company over the next 12 months?
 Q: How would you assess your level of confidence in prospects for the revenue growth of your company over the next 3 years?
 Base: All respondents 2009: 1,124; 2008: 1,150; 2007: 1,084; 2005: 1,324; 2004: 1,394; 2003: 992

Source: PricewaterhouseCoopers 12th Annual Global CEO Survey 2009
 Note: 2009 data are based on interviews conducted in the last quarter of 2008. 2006 confidence question was not asked.

World economies decelerate together

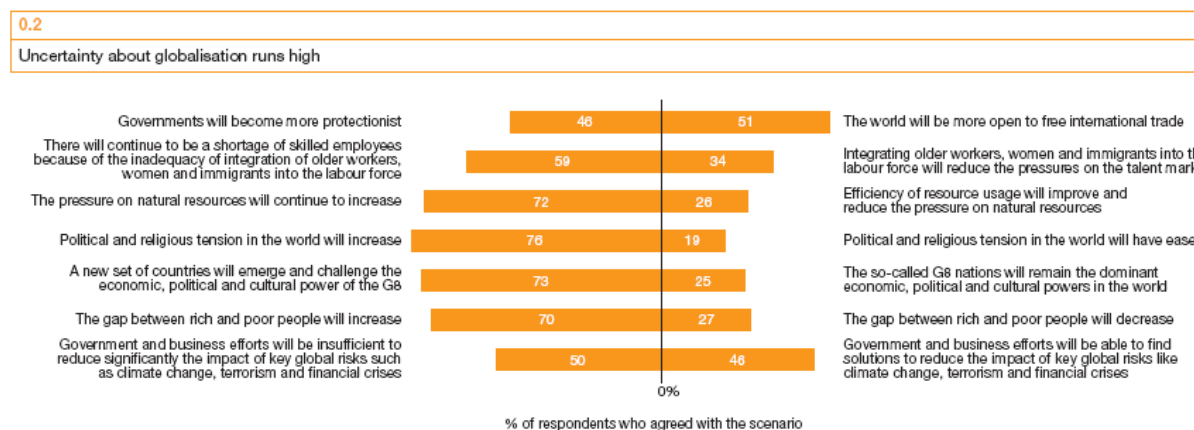


Source: Average forecasts from Consensus Economics surveys in months shown

The present organizational context – CEOs' view

PwC's CEOs Global Survey - 2009

Despite of many uncertainties about globalization and global economic growths directions, some transforming strength are still present in future scenarios considered by the CEOs.



Q: Which of the following scenarios do you feel is more likely to occur in the future, keeping in mind they may not be mutually exclusive?
 Base: All Respondents chose a scenario from each pair, or the option 'Don't know/Refused' 1,124.

Source: PricewaterhouseCoopers 12th Annual Global CEO Survey 2009

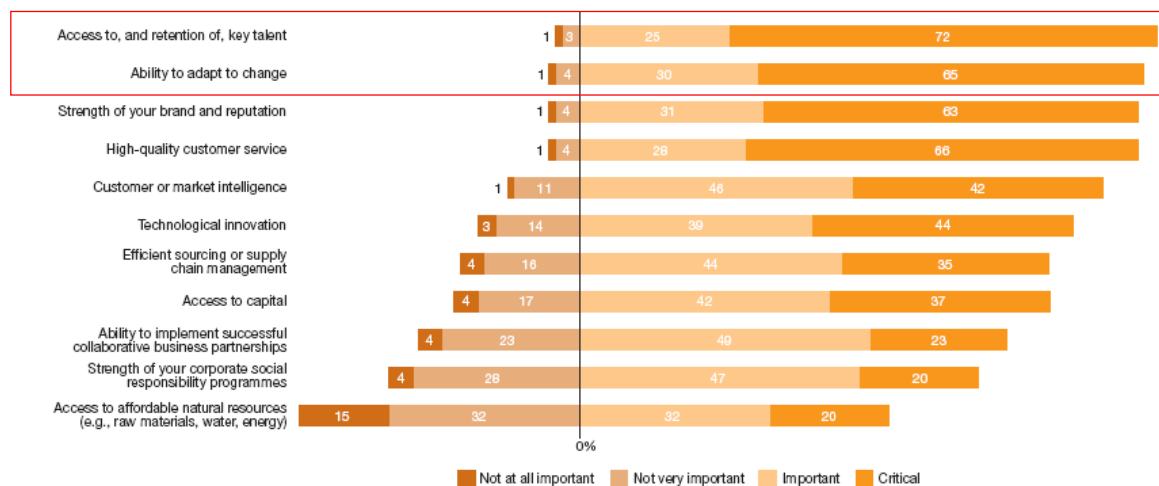
The present organizational context – CEOs' view

PwC's CEOs Global Survey - 2009

Long Term Critical Success Factors:

3.1.2.1

Talent, agility, reputation and customer service are the critical drivers of long-term success



Q: How important are the following sources of competitive advantage in sustaining your growth over the long term?

Base: All respondents 1,124

Source: PricewaterhouseCoopers 12th Annual Global CEO Survey 2009

The present organizational context – CEOs' view

PwC's CEOs Global Survey - 2009

- Innovation
- Environmental issues
- Demographic changes
- Society and young talents' expectation changes

Schedule

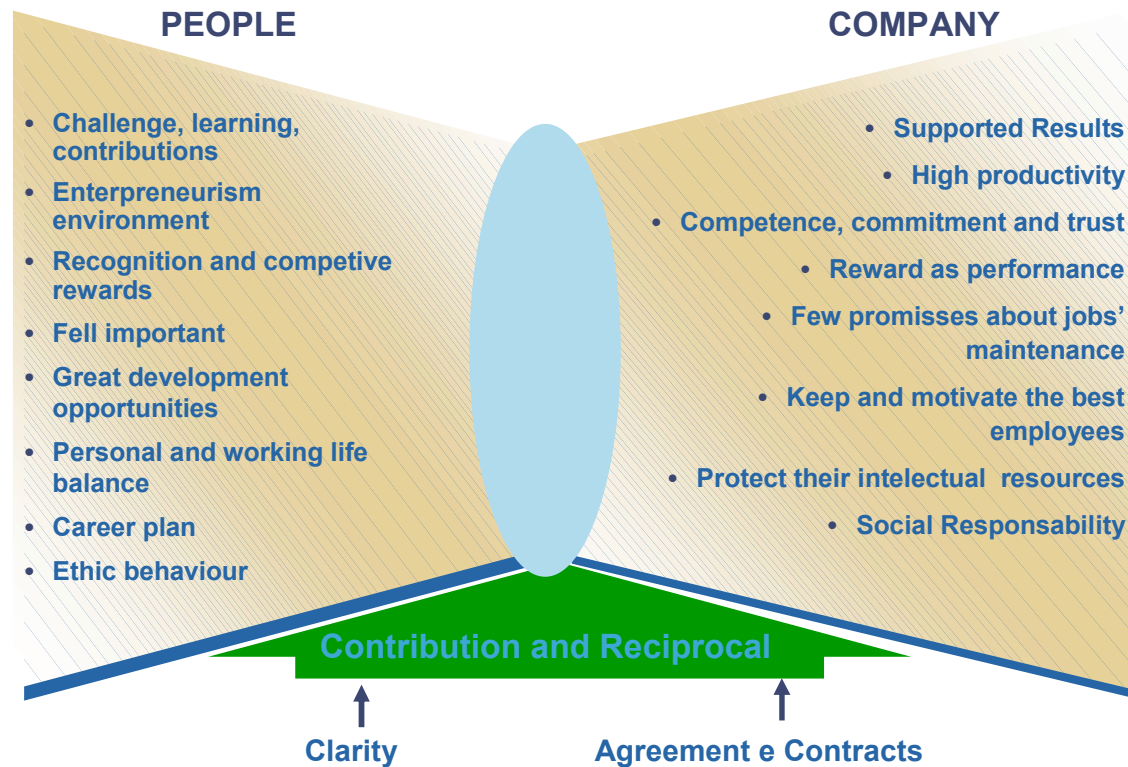
The present organizational context – CEOs' view

Emergent markets expectations

Strategies to deal with the challenges of talents' management

Emergent markets expectations

New expectations and perspectives



Emergent markets expectations

Talents' management and leadership development is an issue that is being discussed for many years, but currently it has a different meaning, mostly in emergent countries.

Professionals think encompassed, besides survival, they want to contribute effectively for the company.

Emergent markets characteristics:

- They are growing in fast rhythm. Identify talents to follow this expansion is an extraordinary challenge.
- Companies from developed countries try to export talent's strategies used "at home" – with unfavorable results
- Some companies conquest employees by keeping the promise of fast career growth, relevant work and meritocracy culture.



Emergent markets expectations

Talents' demand tend to be a constant in developing countries, although each country has your particularity.

Brazil shows effective shortage on the highest leadership levels, the base needs to be prepared to support the present and future challenges.



Schedule

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Emergent markets expectations

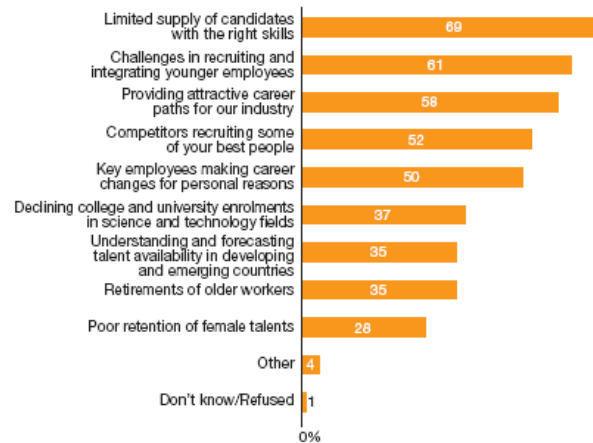
Strategies to deal with the challenges of talents' management

Strategies to deal with the challenges of talents' management

Talents' management – Global View

3.2.2.1

Talent shortage remains the top concern



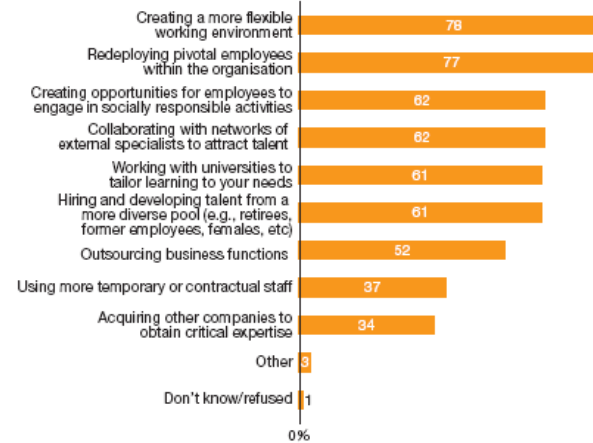
Q: Considering the talent required for the success of your business, what are the key challenges you face?

Base: All respondents 1,124

Source: PricewaterhouseCoopers 12th Annual Global CEO Survey 2009

3.2.2.2

To retain talent, companies increase workplace flexibility and redeploy workers



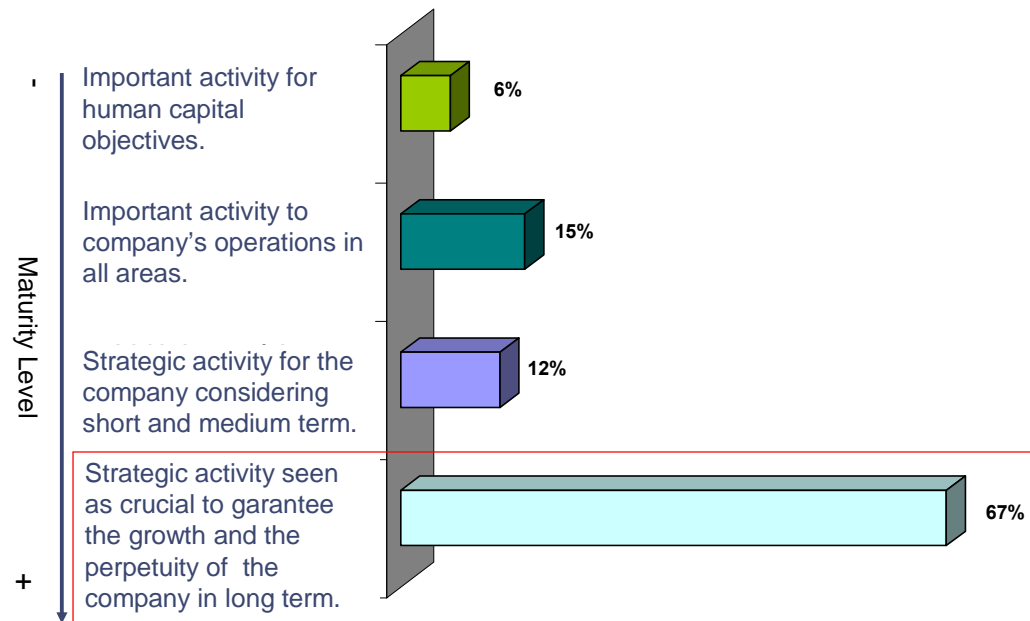
Q: In order to ensure the long-term success and durability of your business, does your strategy regarding your people include any of the following measures?

Base: All respondents 1,124

Source: PricewaterhouseCoopers 12th Annual Global CEO Survey 2009

Strategies to deal with the challenges of talents' management

Importance of Talents' management in Brazil.



Source: Talents' management benchmarking – PwC 2009

Strategies to deal with the challenges of talents' management

- Drawing, implementing and managing a talents' management model requires attention both to functionality and system vitality:

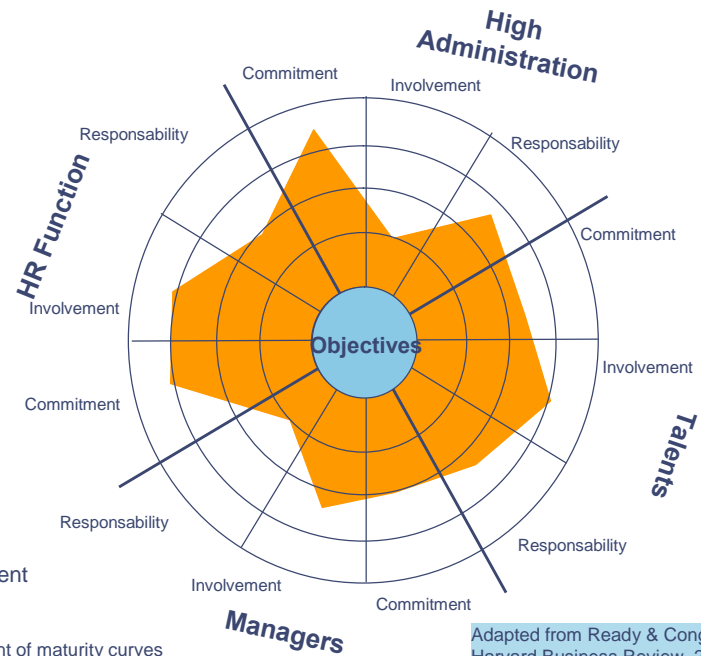
Functionality wheel



PricewaterhouseCoopers

Company's A situation in front of maturity curves (market's best practices)

Vitality wheel

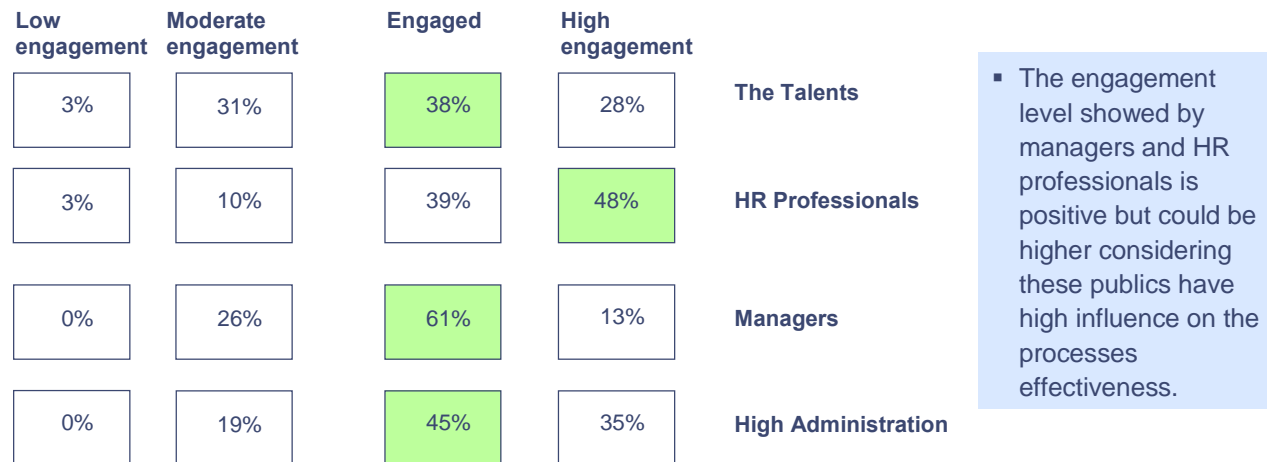


Adapted from Ready & Conger
Harvard Business Review, 2008

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Strategies to deal with the challenges of talents' management

Organizational targets' engagement with talents' management in Brazil.

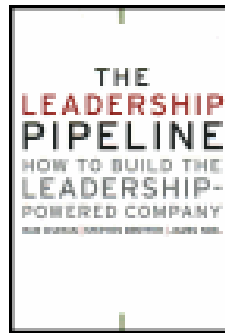


Source: Talents' management benchmarking – PwC 2009

Strategies to deal with the challenges of talents' management

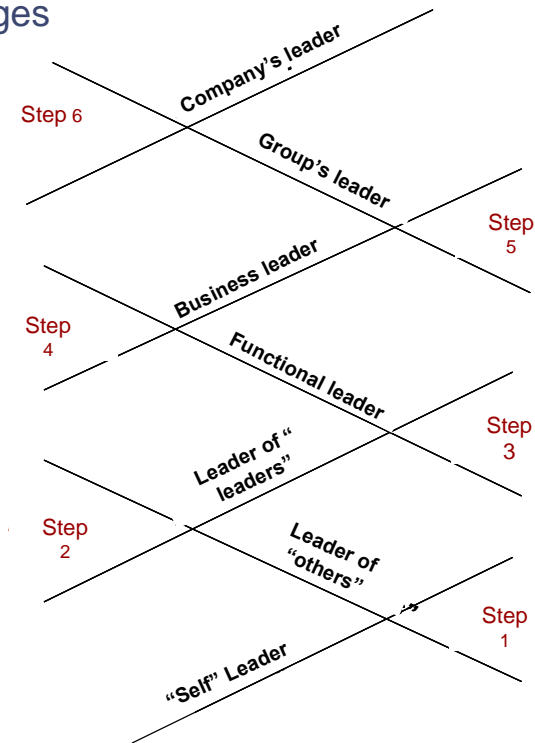
Leadership Development

Leadership Pipeline – Leadership challenges



Ram Charan, 2004

- Big step rite
- The rites helps leaders to build emotional strength once they are responsible for even more complex activities.
- Both competencies and role changes in each pipeline stage.



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