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IBM CEO STUDY 2008

Core traits of the future enterprise

HUNGRY FOR CHANGE

INNOVATIVE BEYOND CUSTOMER IMAGINATION

GLOBALLY INTEGRATED

DISRUPTIVE BY NATURE

GENUINE, NOT JUST GENEROUS

How to change & Innovate sustainably

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pwc

US CEO Survey 2013

How to Develop & Assess 21st century skills

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THE CONFERENCE BOARD
Trusted Insights for Business Worldwide

Human Capital and Operational Excellence are the Top Global Challenges for 2013

The Conference Board CEO Challenge® 2013

Global Rank	CHALLENGES 2013*	Score
N=729		
1	Human Capital	2.44
2	Operational excellence	2.10
3	Innovation	1.99
4	Customer relationships	1.72
5	Global political/economic risk	1.68
6	Government Regulation	1.55
7	Global Expansion	1.31
8	Corporate brand and reputation	0.92
9	Sustainability	0.82
10	Trust in business	0.46

N=Number of overall responses. The response rate varies for each challenge. Each score represents the mean of the ranks given the challenge. For information about how the scores were created, see "About the 2013 Survey" on page 24 of the ***CEO Challenge*® 2013 Summary Report**.

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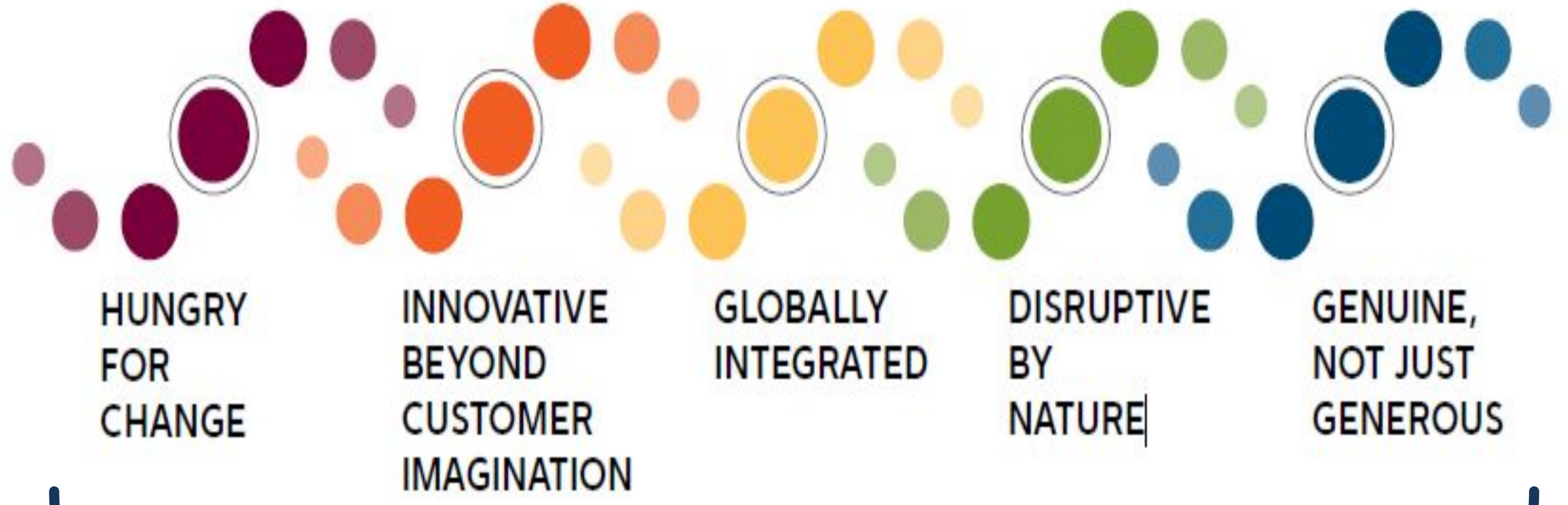
Core traits of the future enterprise



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IBM CEO STUDY 2008

Core traits of the future enterprise

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How to change & Innovate sustainably

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US CEO Survey 2013

CEOs to strengthen engagement with partners to fortify supply chains against array of risks

How concerned are you about the following potential business, economic and policy threats to your growth prospects?

Base: US: 167; Global: 1,330. CEOs who responded 'extremely' or 'somewhat' concerned, select answers shown.
Source: PwC, *16th Annual Global CEO Survey,* January 2013.

How to Develop & Assess 21st century skills

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THE CONFERENCE BOARD
Trusted Insights for Business Worldwide

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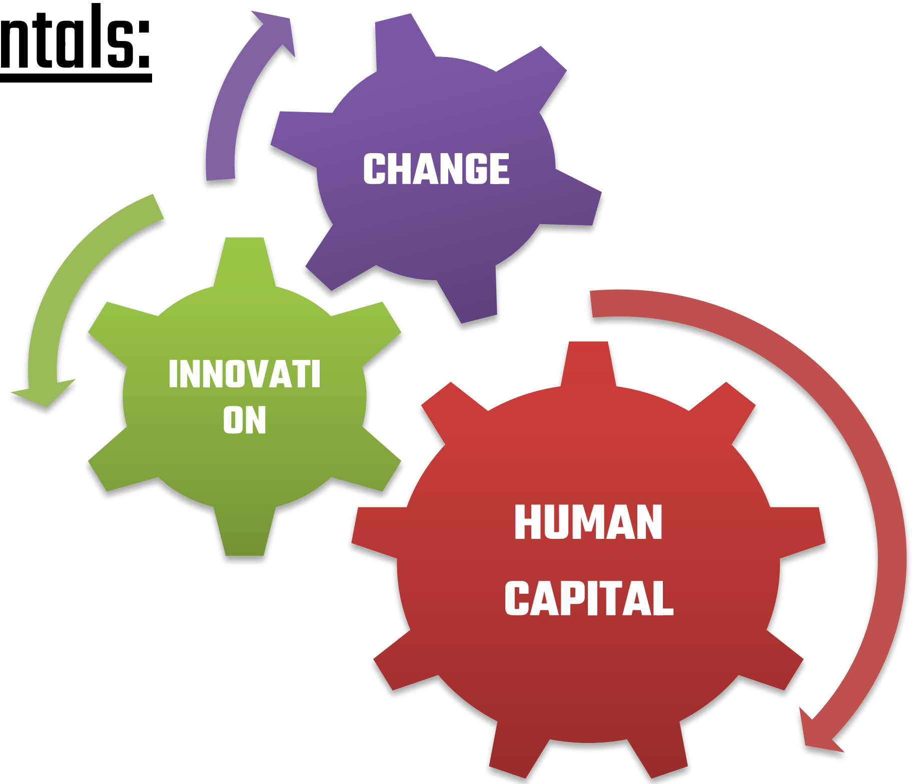
2013 & Beyond

Results-Oriented Fundamentals:

- Human Capital Development & Assessment
- Sustainable Innovation
- Systemic Change Management.



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Human Capital: Decade Milestone

Skills gaps are widening. HR will need to quickly tap skills when they are needed – and where. HR will begin to arm itself with the tools and insights of the science of Human Behavior (8) 2013

Building leadership talent is the most significant capability building challenge (80%). 70% of workforce effectiveness is measured by employee criteria (4)

Learning and innovation skills are what separate students who are prepared for increasingly complex life and work environments in today's world and those who are not . (7)

52% of non-CEO said that their teams were doing poorly in critical areas (3)

Overall, demand is growing for non-routine analytical skills involving creativity, problem-solving, communication, teamwork and entrepreneurship (6)

Less than half of the organizations measure the effectiveness of their HC programs by their business impact or ROI (2)

Key Organizational capabilities: Developing effective leadership capabilities (65%). Creating an organization and culture that adapts effectively to change (49%) (1)

Only 30% use other metric than employee feedback to measure training impact (5)

2004 2005 2007 2008 2010 2011 2013

(1) Accenture. “high performance workforce study 2004”. Peter Cheese. 2004
(2) IBM .”Global Human Capital Study 2005. IBM BCS 2005
(3) Harvard Business Review. CEOs misperceive top team performance. Richard Rosen + Fred Adair . Sept 2007
(4) IBM “Making Change Work”. 2008
(5) McKinsey quarterly “getting more from training programs” Aaron Desmet. Oct 2010
(6) OECD. A skilled workforce for strong, sustainable & balanced growth. ILO. Nov 2010
(7) Partnership for 21st century skills “Framework for the 21st century Learning”. 2011
(8) Accenture. “The future of HR” Institute for high performance. 2013

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Gartner® Magic Quadrant

For Enterprise Learning Systems

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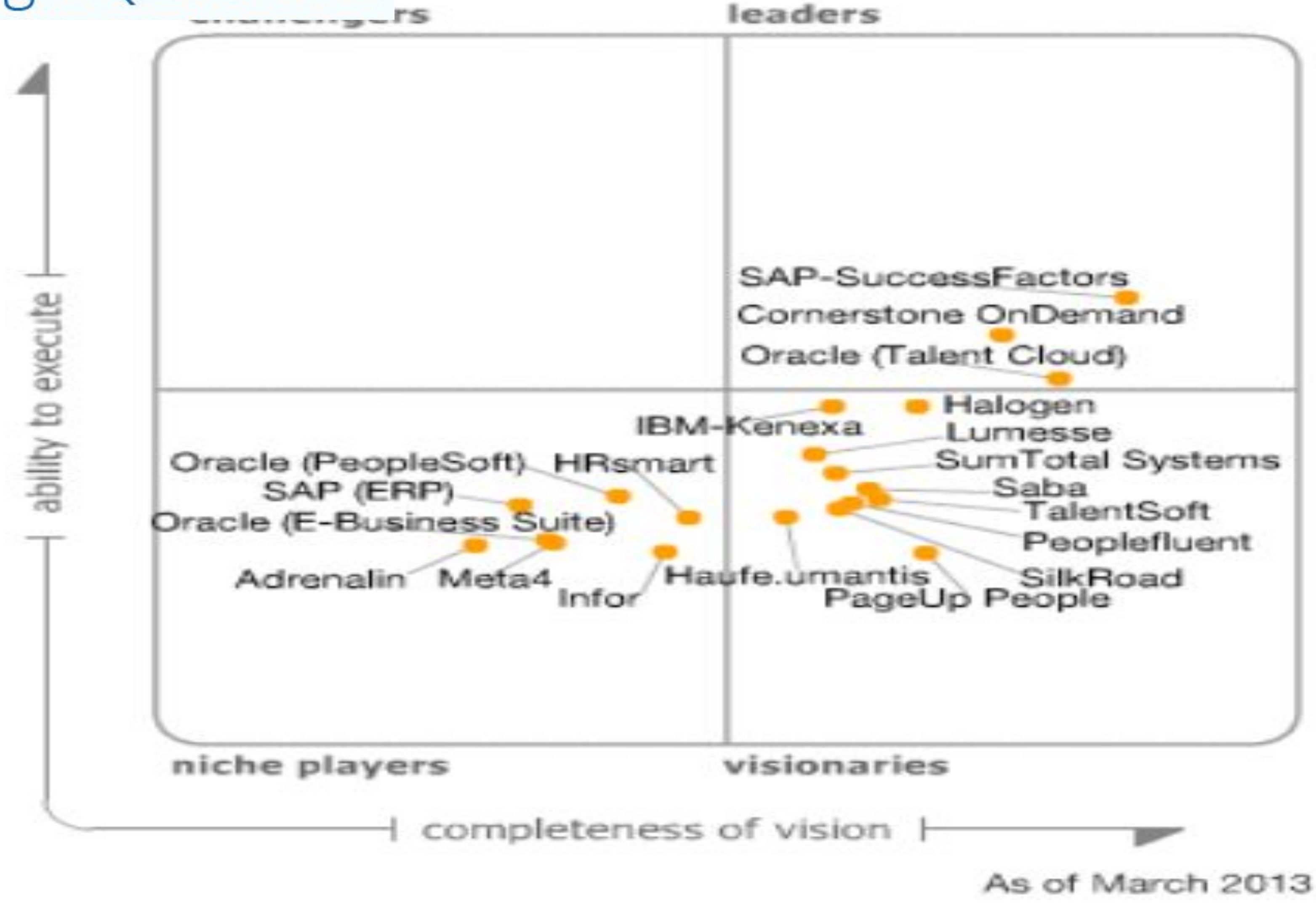
For Talent Management Suites



Source: Gartner (March 2013)

Enterprise Learning & Talent solutions

MARROCO PRODUCTOS

Innovation: Decade Milestone

Most innovations, especially the successful ones, result from a conscious, purposeful search for innovation opportunities, which are found only in a few situations (1)

2000

Best benefits from innovation in Education: 78% having employees with greater creative thinking, collaboration, social skills and problem solving capabilities (2)

2005

Undervaluing and underinvesting in the human side of innovation is another common mistake.(3)

2006

About Industry Model Innovation. Some CEOs do not believe their companies have the appropriate position in their industries or within their own value chains to drive this kind of significant change. (4)

2008

Companies satisfaction with their return on innovation spending continues to edge higher but remains relatively low. The majority of companies are dissatisfied with their innovation measurement practices (5)

2010

Just 43% believe their organizations are highly effective at generating new ideas (7)

Only 36% believe they are highly effective at converting ideas to products project development (7)

2012

We're never going to build a truly innovative company without a gene-replacement therapy. You have to train people how to be business innovators (6)

75% ranked innovation among their top 5 priorities. Companies are seeking to innovate but are increasingly less satisfied with the results. Very satisfied with initial idea generation 36% - Growing portfolio 25%, End-of-Life 21%(8)

2013

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(1) Harvard Business Review . “Cracking the code of Change” Michael Beer/ Nitin Nohria. May 2000

(2) CISCO. “Innovation 2005 study” . Momentum Research Group. 2005

(3) Harvard Business Review . “innovation the classic traps” Rosabeth Moss Kanter. November 2006

(4) IBM “Global CEO study”. 2008

(5) Boston Consulting Group. Innovation 2010. James Andre. 2010

(6) Forbes. Gary Hamel on innovating innovation. http://www.forbes.com/sites/stevedenning/2012/12/04/gary-hamel-on-innovating-innovation/ April 2012

(7) “Global Innovation Index 2013” . WIPO/Booz & Co./INSEAD/Cornell University. Jan 2013

(8) Accenture. Why low risk innovation is costly. Wouter Koetzier & Adi Alon. 2013

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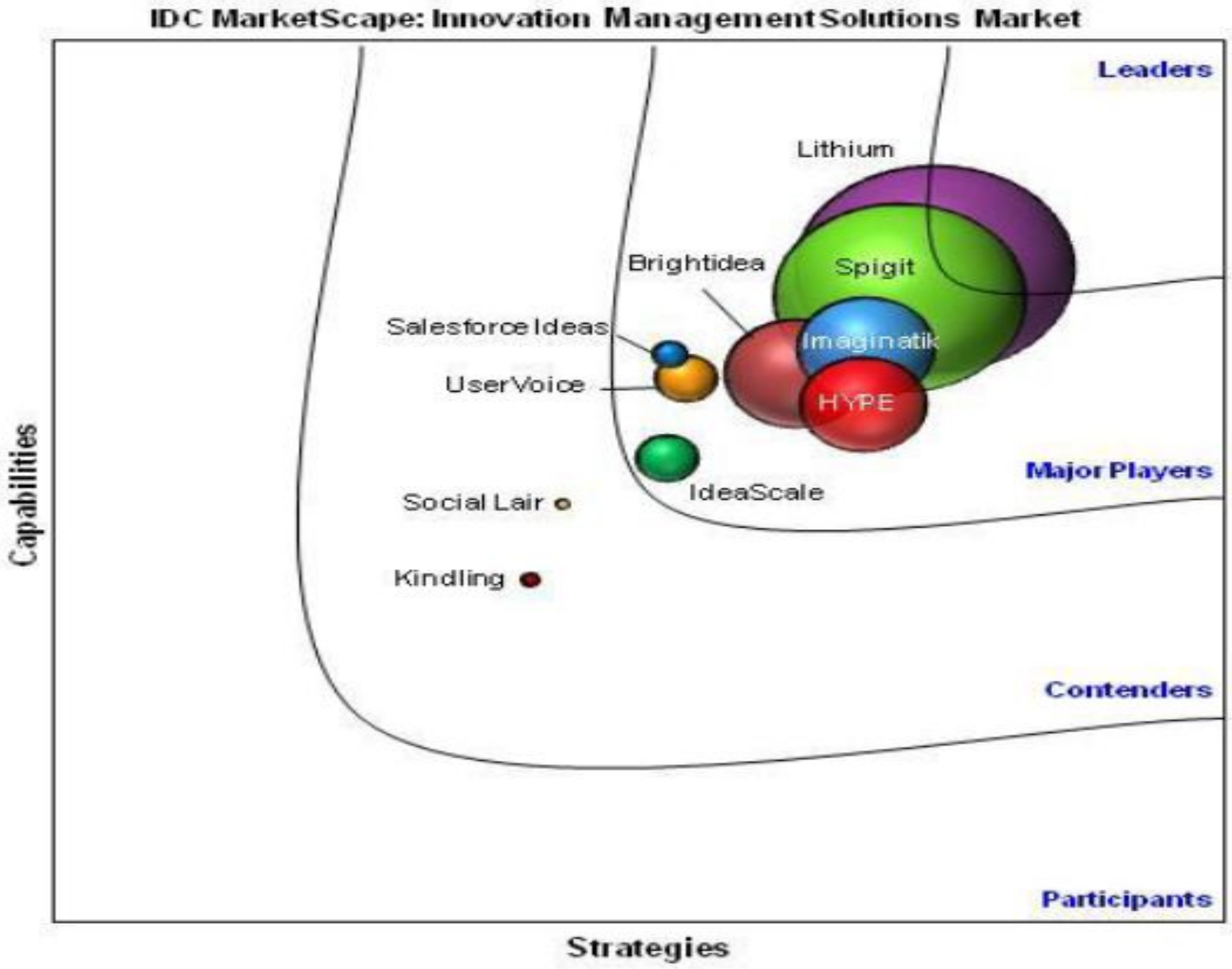
IDC Analyze the Future

IDC MarketScape: Worldwide Innovation Management Solutions Vendor Assessment



Source: IDC, 2013

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Innovation Management Software

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Change Management: Decade Milestone

Only 25% of change management initiatives are successful over the long term.(8) 9/ Forbes

The most significant challenge for project success is changing mindsets and attitudes 58% (4)

70% of all major change efforts in organizations fail(7)

Achieving project success does not hinge primarily on technology , depends largely on people (4)

buyers are disappointed with the consulting provider's ability to deliver return on investment (ROI) for the project and maximize the project's value (6)

For change to be anything but superficial and temporary, it must be systemic (3)

Benefits of change initiatives have been delayed substantially or even negated (2)

Only 15% of webinar participants reported a "well" integration of change management in their organizational projects (5)

The brutal fact is that about 70% of all change initiatives fail (1)

The world leader in change management research.

2000 2004 2006 2008 2011 2012 2013

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(1) Harvard Business Review . "Cracking the code of Change" Michael Beer/ Nitin Nohria. May 2000

(2) Accenture. "Change management. Disturbing the system". Peter Cheese. Outlook 2004

(3) Harvard Business Review . "Architects of Change" Thomas Stewart Editor in chief. April 2006

(4) IBM "Making Change Work". 2008

(5) Prosci /ADKAR. Change management certification webinar survey. Nov 2011. http://www.change-management.com/tutorial-integrating-cm-pm.htm

(6) IDC. MarketScape: Worldwide Organizational and Change Consulting Services 2013 Vendor Analysis

(7) http://www.kotterinternational.com/our-principles/changesteps Dr Jhon Kotter (HBS)

(8) Forbes "New Study Explores Why Change Management Fails - And How To (Perhaps) Succeed" Victor Lipma. Sept 2013

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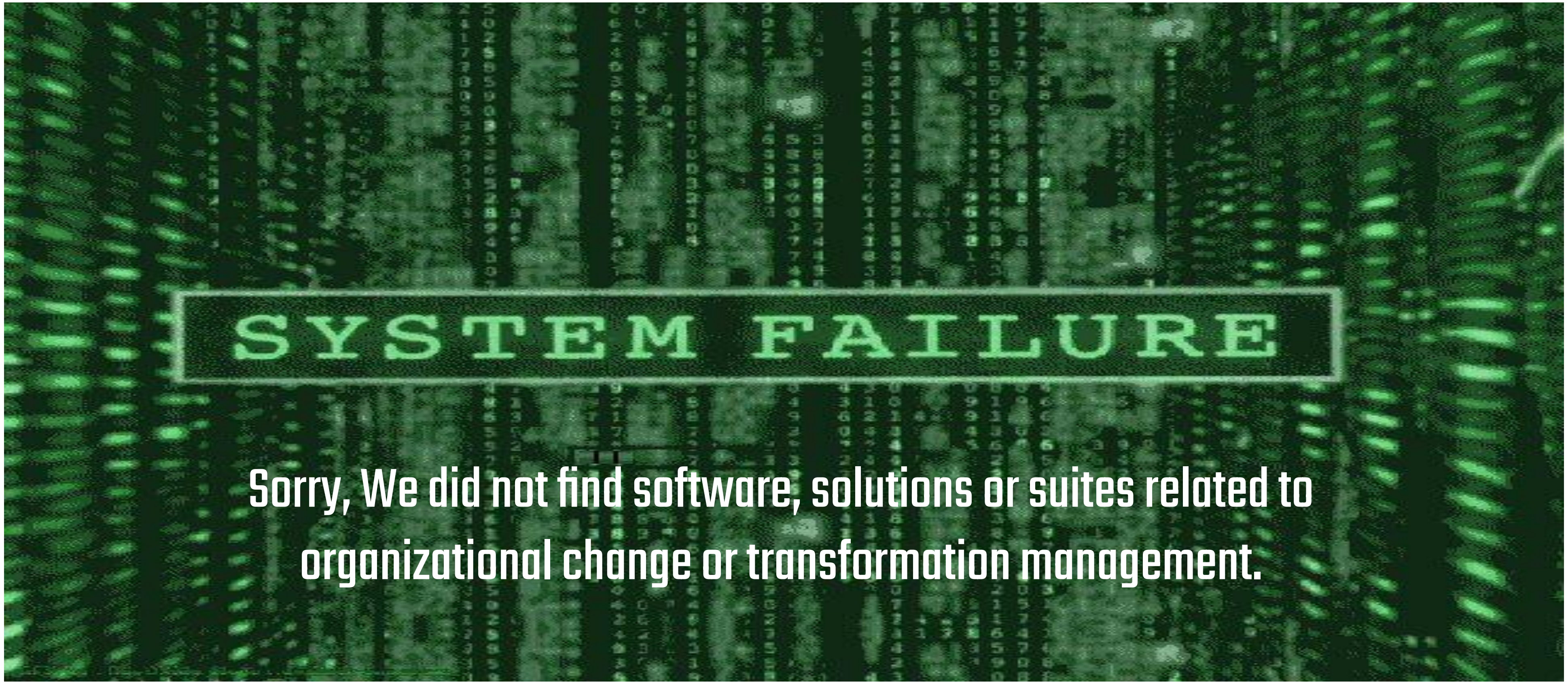
Gartner
Magic Quadrant

For Change Management Software

(No IT-change related)



Sorry, We did not find software, solutions or suites related to organizational change or transformation management.

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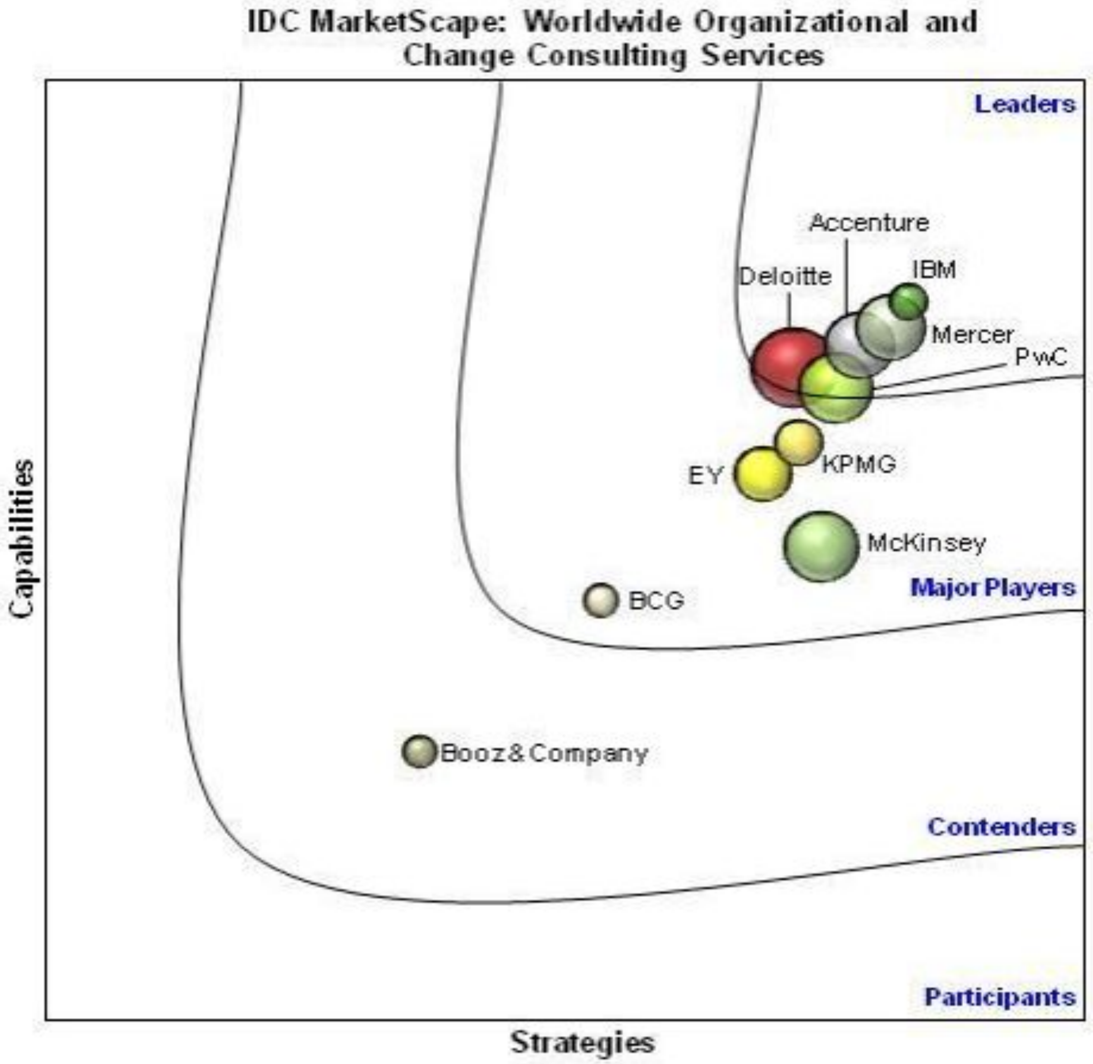
IDC MarketScape Worldwide Organizational and Change Consulting Services Vendor Assessment



Source: IDC, 2013

Consulting Practices in Change Management

MARROCO PRODUCTOS

After 40 years in a social sciences lab,
we can provide real meaning to:
"Learn to Change"

SCIENTIFIC OUTCOMES

- The systemic integrated model (Theoretical model of research and action)
- Theory of the Organizational Change Learning

1

WES©
(Work – Education System)
Transformational system to improve productivity. EDT © is the IT software version of WES ©

2

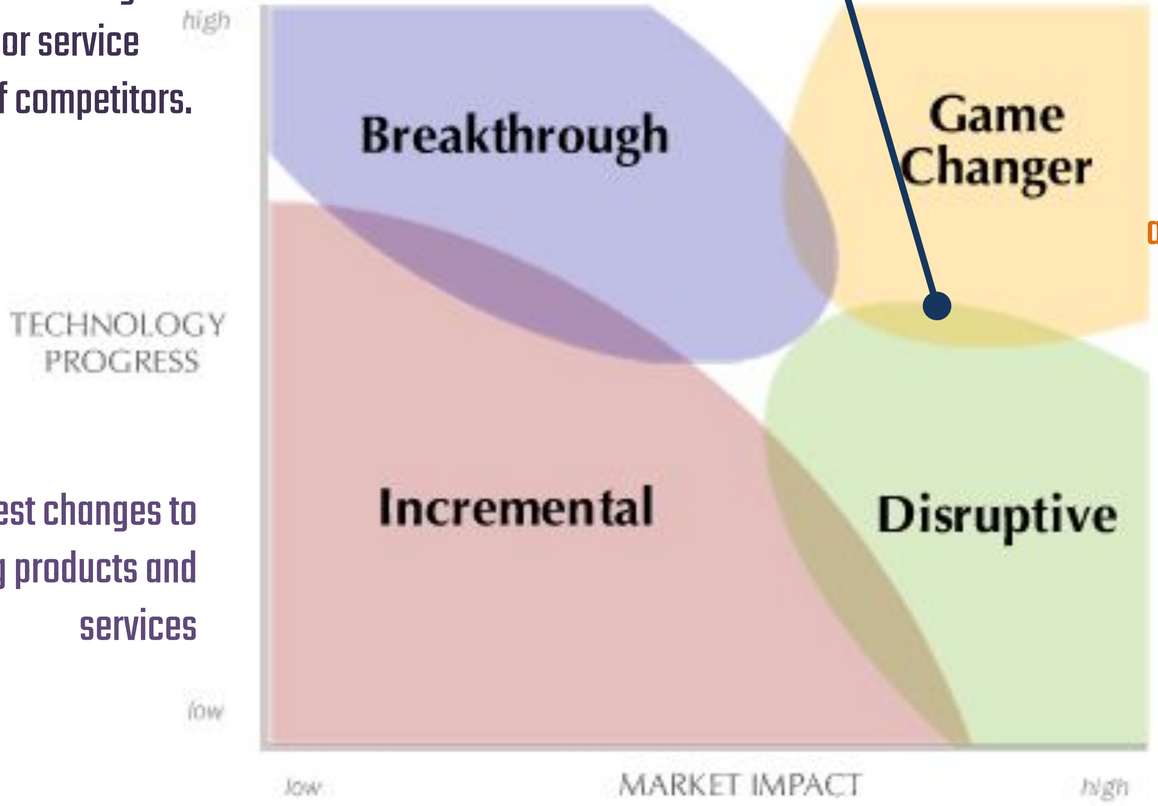
3

Assessment of the effectiveness of EDT ©. Until now, metrics remains…82% of people changing to 21st century profile. Around 90% of goals achievement

1969

2013

large advances that propel an existing product or service ahead of competitors.



transform markets and even society. These have a radical impact on how humans act, think and feel in some way.

modest changes to existing products and services

bring to a market a very different value proposition than had been available previously

4 Zones of Innovation

by: James Kallbach

In: http://experiencinginformation.wordpress.com/2012/06/03/clarifying-innovation-four-zones-of-innovation/

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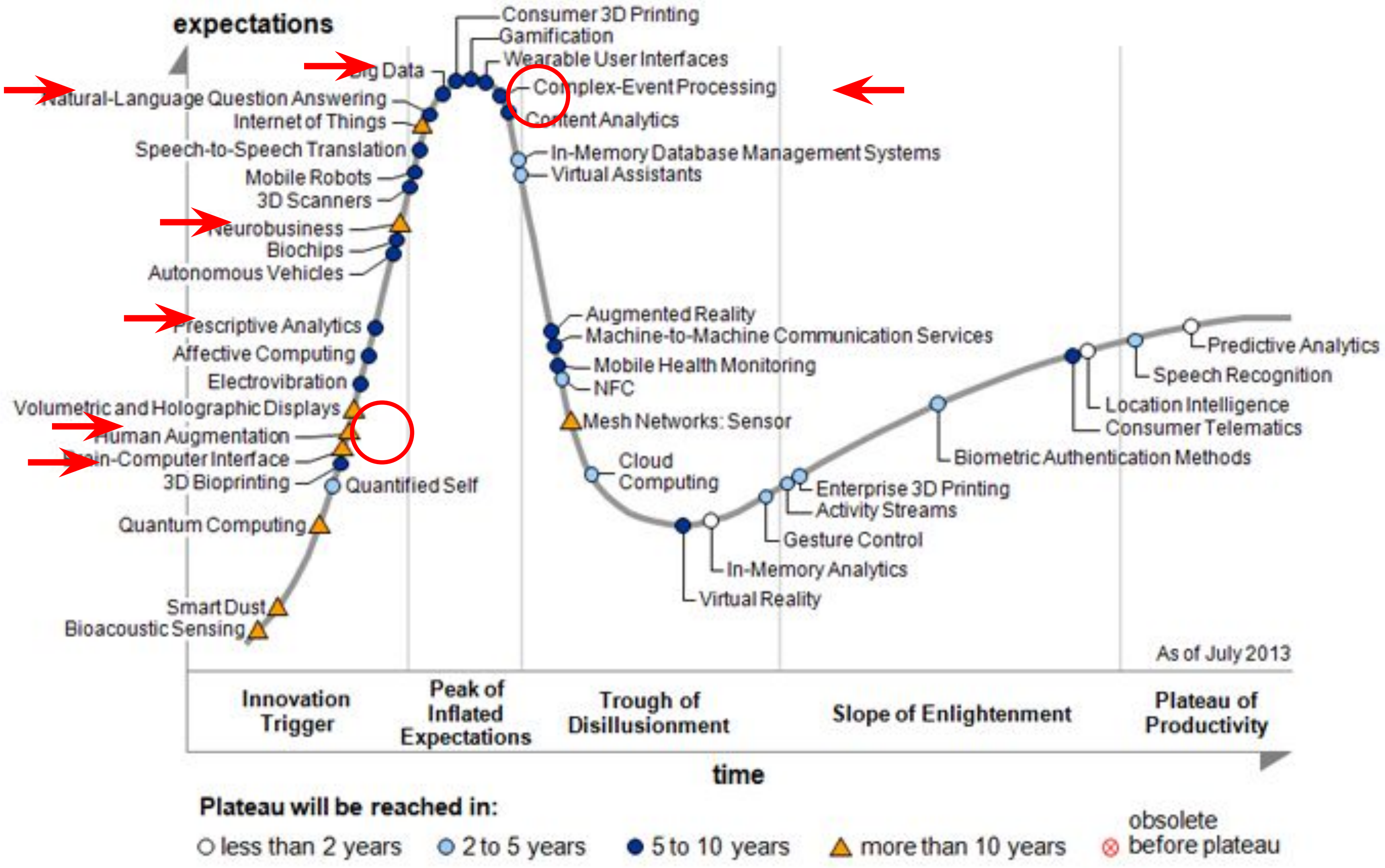
Hype Cycle for Emerging Technologies/ August 2013.



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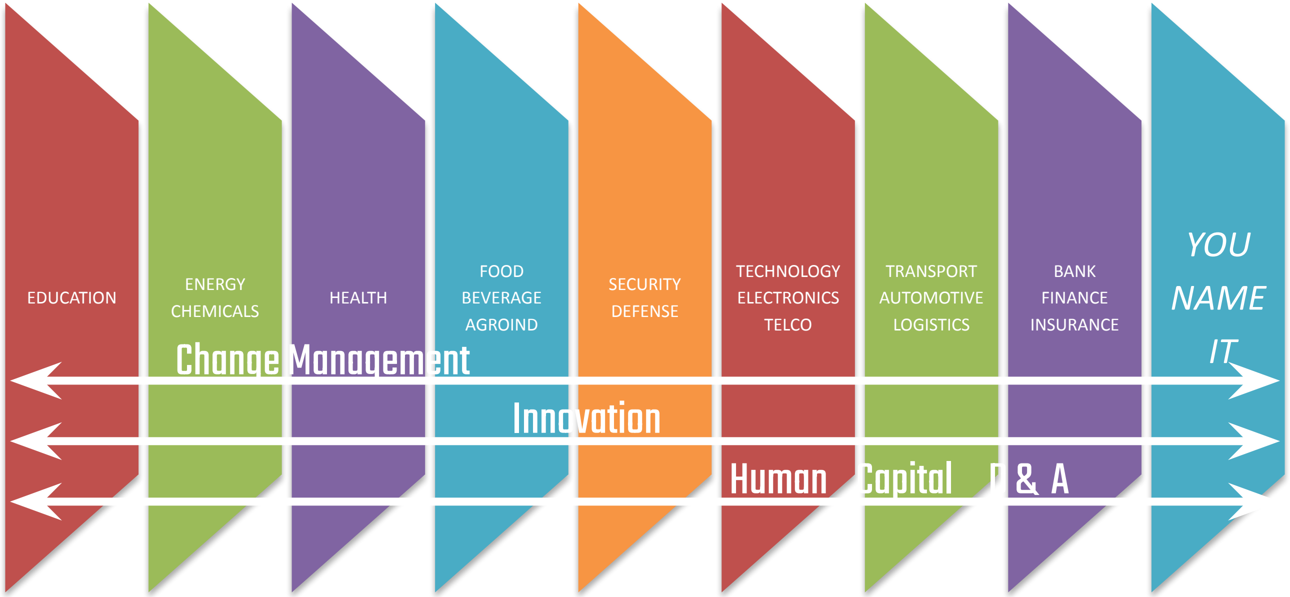
Industry Coverage



QLA©

To assess quality in the 21st century education

EDT©

To transform organizations

MHD ©

To develop 21st century skills

MPO©

To optimize projects performance

EP-XXI ©

To assess 21st century skills