



# 2012 中国人才管理状况调研报告

## 2012 CHINA TALENT MANAGEMENT LANDSCAPE SURVEY REPORT

调研主办方  
By



KORN/FERRY INTERNATIONAL



智享会  
HR Excellence  
Center

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## 特别鸣谢

光辉国际和人力资源智享会感谢以下调研顾问团成员对此次调研的大力支持以及在采访过程中提出的宝贵意见与指导（顾问排名不分先后，仅按姓氏首字母排列）。



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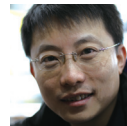
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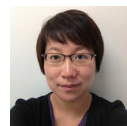
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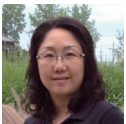
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最后，人力资源智享会的朱茱蕾在此次调研过程中承担了数据收集、分析及协调等工作，在此表示感谢。

## 人才市场所处的业务环境

宏观经济与业务环境对人才状况与人才管理有着深远的影响。在过去的一年，欧洲金融的动荡与美国经济的迟缓在世界范围内掀起了连锁反应。当然，中国也不例外。国际货币基金组织（IMF）在一份报告中指出，从欧元区刮来的“温和的经济萧条”之风使得全球增长减缓 75%。虽然与其他地区相比较，中国的经济相对乐观，但是，增长速度是放缓的。“当全球大部分地区经济衰退的时候，中国应该要承受住短期内经济增长放缓的局面，同时做好对市场影响的缓冲。”（国际货币基金组织 2012 年中国经济展望报告）

在西方国家经济衰弱的大背景下，中国在世界经济中的地位显得越来越重要。许多跨国公司把中国看成是具有高潜力成长的引擎，并对企业在中国的成长前景表示谨慎的乐观。在华欧盟商会的 2012 年企业运营信心度调研数据显示，78% 的受访企业对于未来两年内在中国的业务成长表示乐观。并且，绝大多数的企业在学习产品或者提供服务时，把中国客户看成是主要目标。然而，伴随着中国市场的日益成熟，劳动力成本也水涨船高。换句话说，低成本和以西方国家为中心的商业战略也许已经过时了。为了加快中国引擎，企业需要那些能够在变化的业务环境下快速调整 and 高效表现的人才。他们必须了解中国市场，平衡全球资源，并且为客户提供创新和整合的服务从而在放缓的，甚至停滞的经济形势下继续促进业务成长。

## 调研结果摘要



**当前的人才市场**十分注重于运营层面。许多公司在运营型人才的质与量上争夺。如何寻找可以高效完成任务的专业技术人才和一线经理始终是企业面临的一个关键课题。



**人才敬业度驱动力**随着年龄的增长有所变化，从学习和晋升机会转变为职业安全感。而良好的薪酬福利始终处于驱动力排名的前三位。



大部分的人才管理项目是由人力资源部门驱动的，并对**初级和中层经理**的发展较为关注。



行为面试法和 360 度反馈调研是最常用的两种**人才测评手段**。



在职学习，岗位调换和内部导师辅导被视为**最有效**的三种人才发展方法。



调研结果显示许多企业在**高潜力人才**的识别与发展方面取得了进步。越来越多的企业在高潜力人才发展方面加大了力度，并且把大部分的投入放在 10% 或者更少的高潜力人才上。



培养**内部辅导文化**是 2013 年绝大多数人才管理经理的工作重点之一。

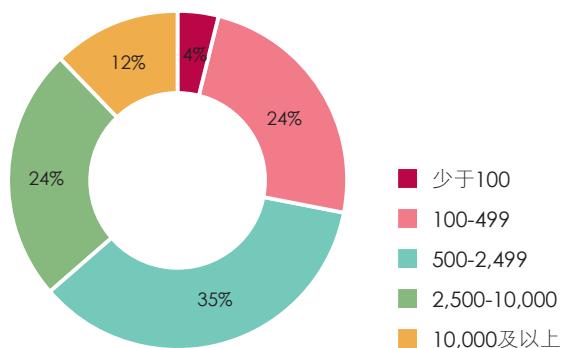
## 关于本次调研

我们从2012年5月到2012年8月进行问卷数据的收集工作。从人力资源智享会的活动（收集问卷151份）以及网上调研（收集问卷213份）共收到364份完成的问卷。在去除了重复（同企业）、无效、以及未完成的问卷之后，我们共保留了350份有效问卷（来自350家不同企业）。以下是样本的统计数据。

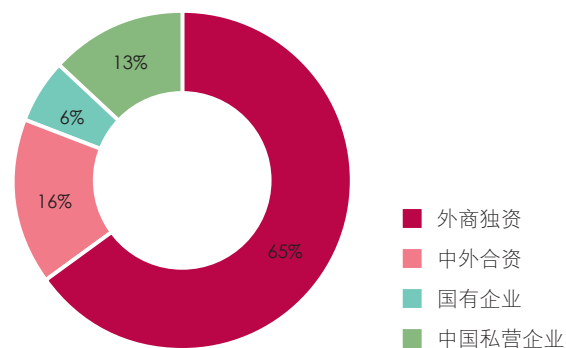
### 行业分布

行业	参与数	占总样本的%
生命科学	46	13%
机械制造	42	12%
信息技术	41	12%
汽车及零部件	37	11%
消费品	35	10%
化工与石化	23	7%
专业性服务	23	7%
多样化生产	19	5%
金融服务	15	4%
零售业与电子商务	12	3%
电子电气	9	3%
能源动力	9	3%
运输及物流	7	2%
其他行业	32	9%

### 企业规模

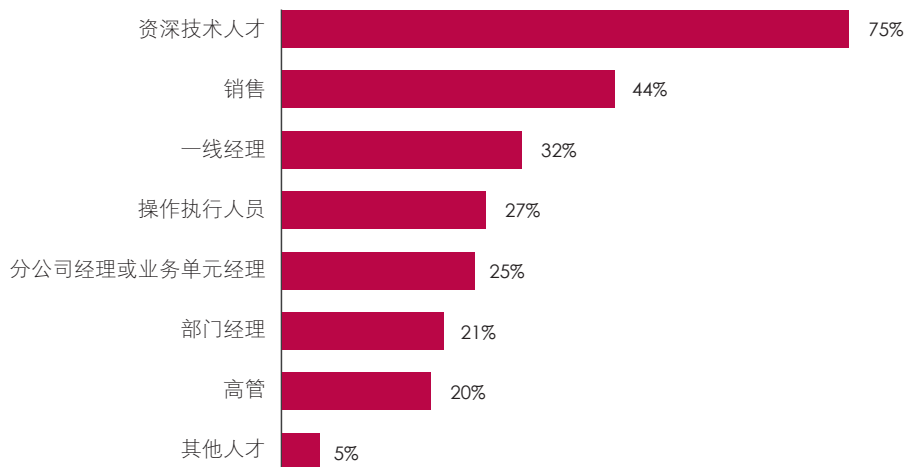


### 企业性质



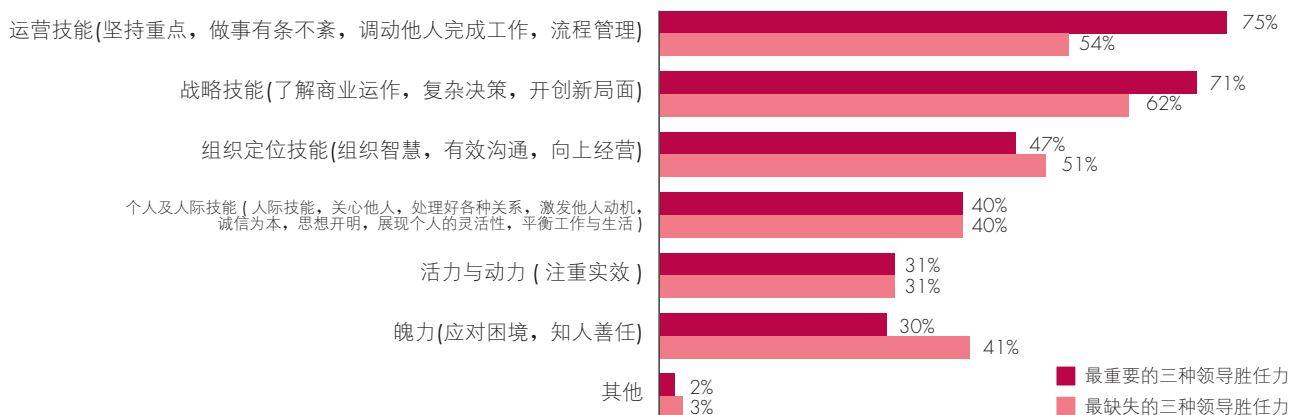
## 第一部分 人才现状

### ① 贵公司最紧缺的三类人才



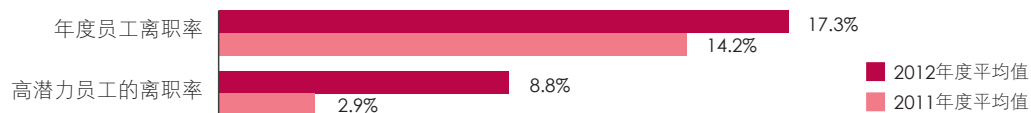
资深技术人才与销售成为大多数企业最为缺失的两类人才。这表明大多数企业仍然关注于操作与执行层面。除此之外，研发中心的大量建立是导致资深技术人才紧缺的另一原因。

### ② 您认为目前对贵公司最重要与最缺失的三种领导胜任力分别为



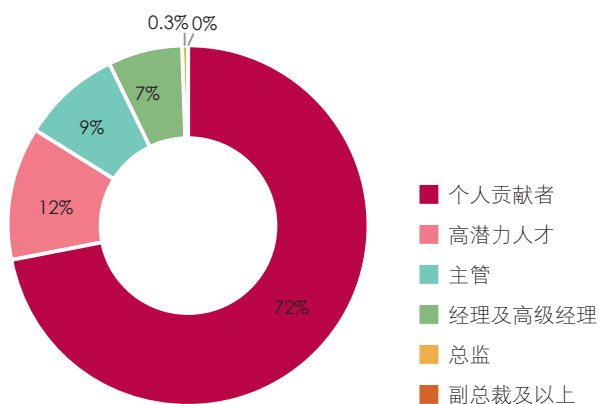
很显然, 那些被认为最重要的领导力素质能力同时也是最为缺失的。运营技能再次被视为最关键的素质能力。

### ③ 贵公司2012年度员工大致离职率



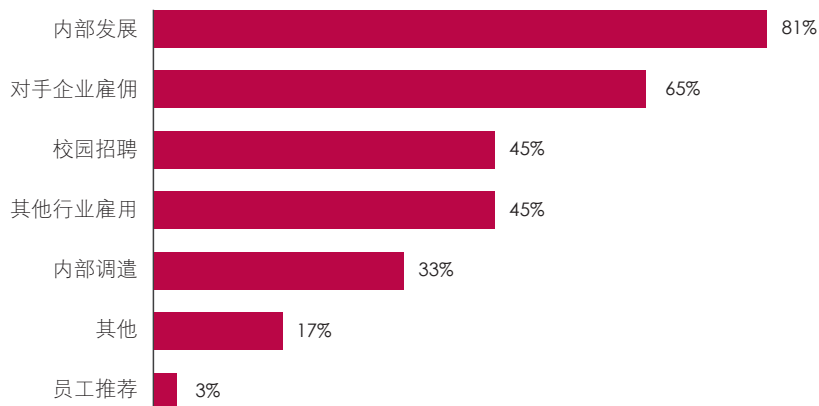
数据表明人才市场相对活跃。值得注意的是，高潜力人才的离职率大大高于去年调研中的数据。

### ④ 贵公司离职比例最高的职级



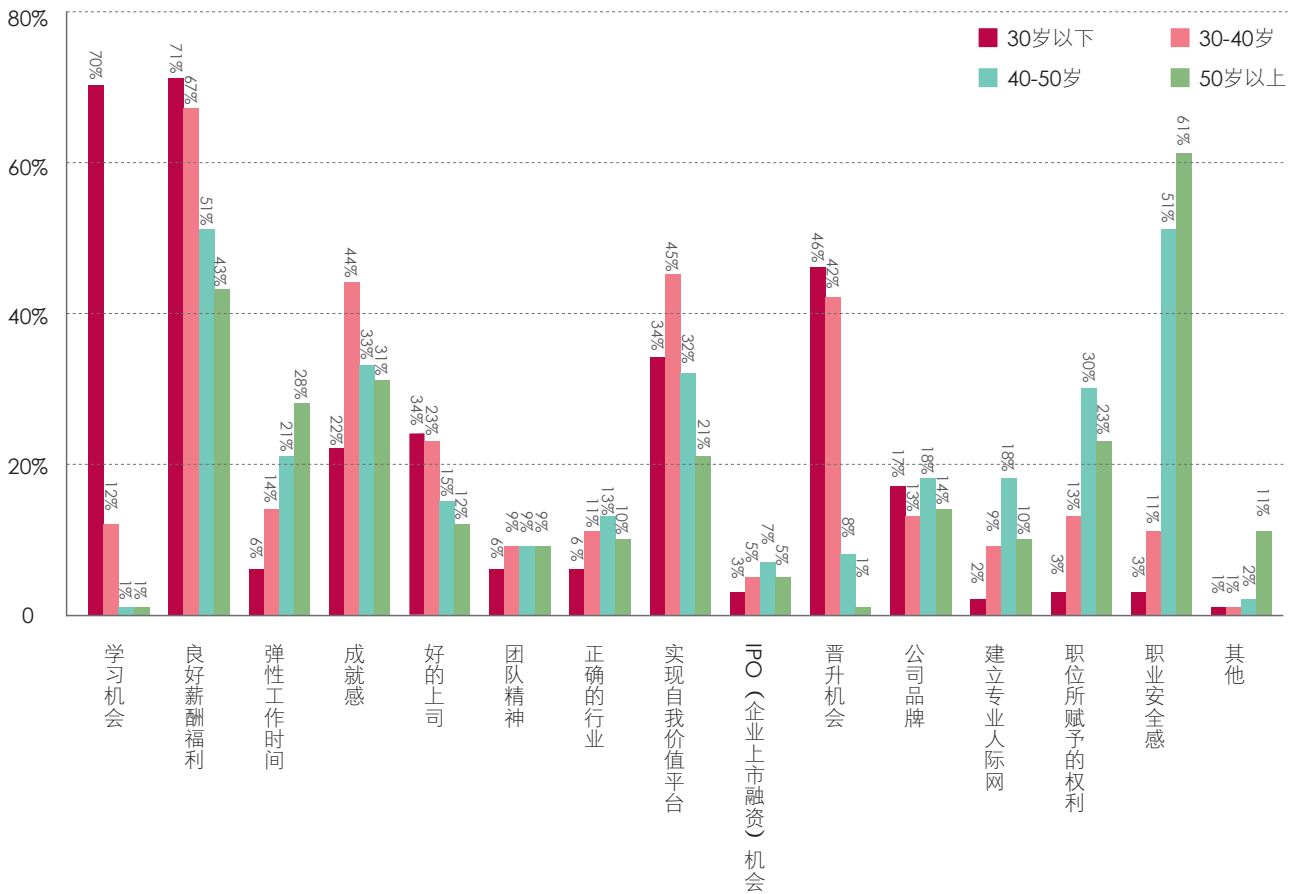
这些结果也反射出之前关于企业最缺失人才的调研结果：在当今人才市场中，资深技术人员与销售是目前企业最需要的人才。

### ⑤ 贵公司最主要的三种人才招聘来源渠道



内部发展与晋升为最主要的人才来源渠道，这表明大多数企业更倾向于发展方式而不是购买策略。

## 6 贵公司各个年龄段的员工最看重的三种敬业度驱动力

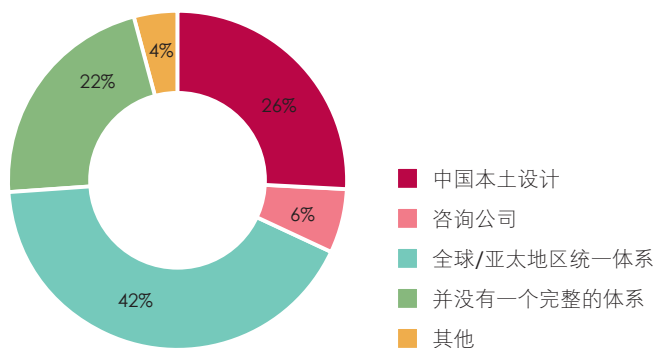


虽然良好的薪酬福利始终是排名前三的敬业度驱动力，薪资与晋升的排名随着人员年龄的增长而下降。弹性工作时间与职业安全感的排名上升。同时，学习机会不再被视为一个强大的激励因素，尤其对于资深员工。这对于领导力发展前景来说，并不是一个好的迹象。



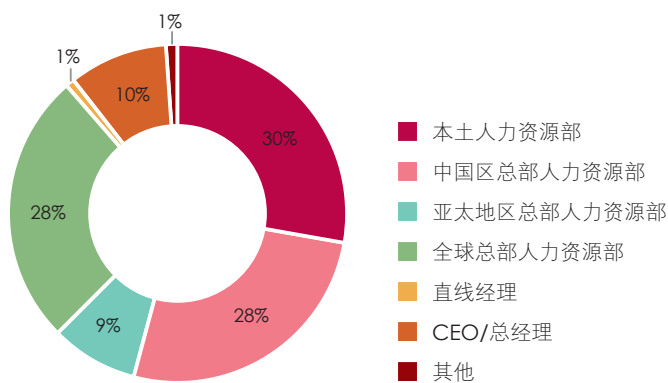
## 第二部分 人才管理现状

### 7 贵公司人才管理体系源于



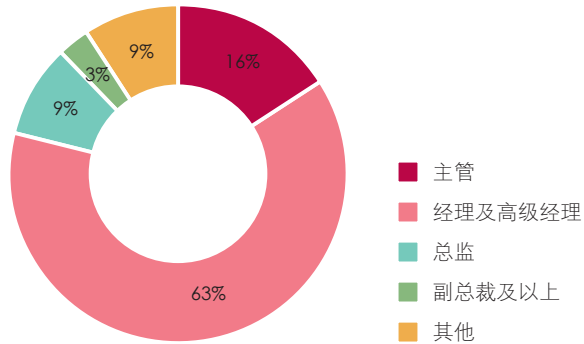
与去年的调研数据相比，多数企业人才管理体系的设计与投入都根据当地情况与需求建立。

### 8 贵公司的人才管理项目的主导人为



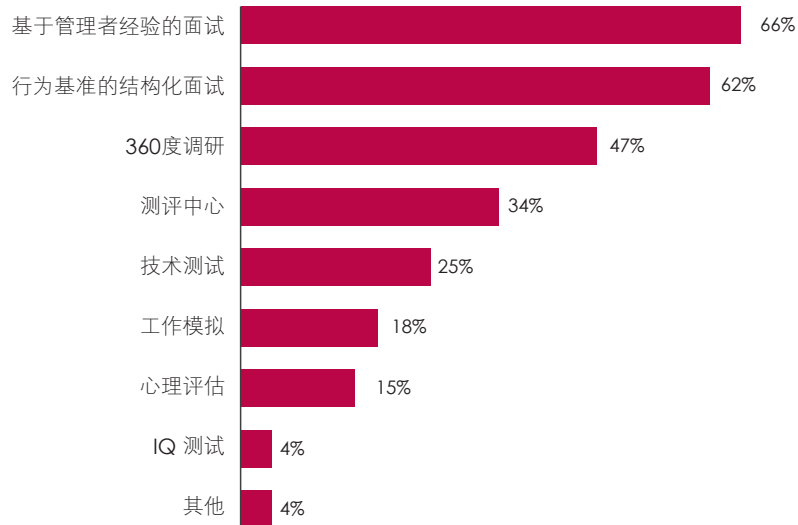
值得庆幸的是，一些业务领导人（CEO和总经理）正在主动推动人才发展。但与全球其他企业相比（65%；Economist Intelligence Unit, 2010），所占的百分比还不是很高。

### 9 贵公司最注重领导力发展的层级



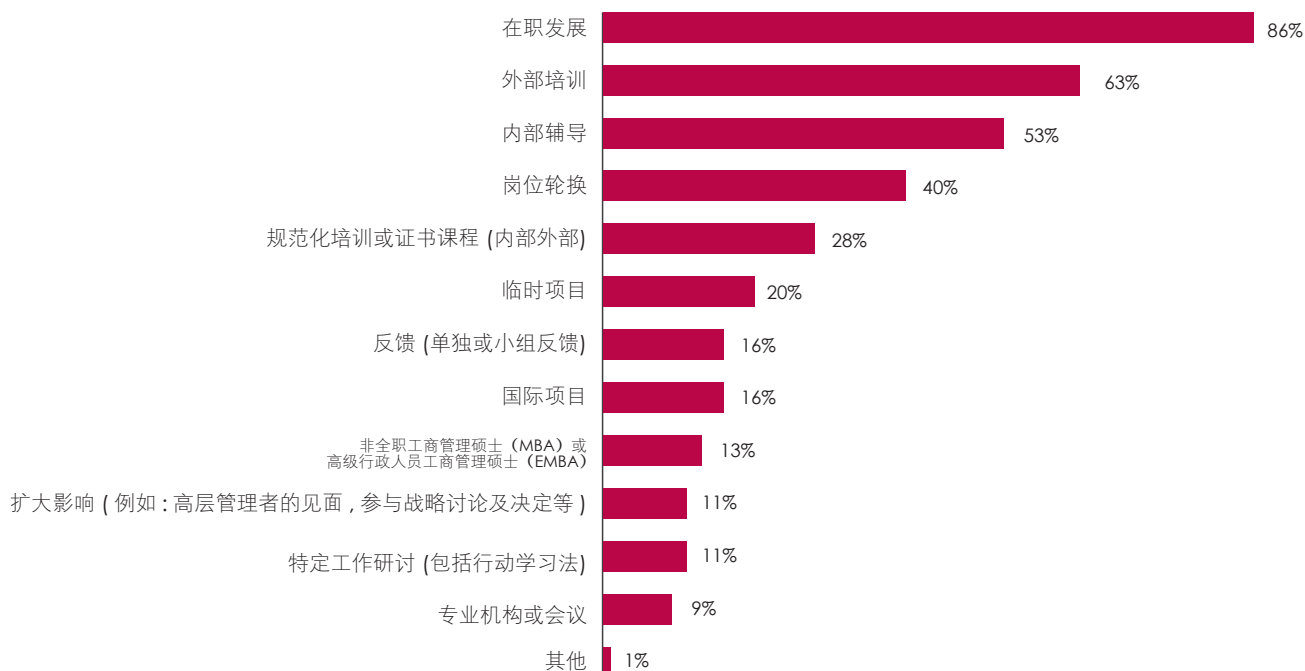
这里显示的结果与去年调研结果非常接近，中层领导者仍然是多数企业人才发展的核心人群。

### 10 贵公司最经常使用的三种人才评估方式

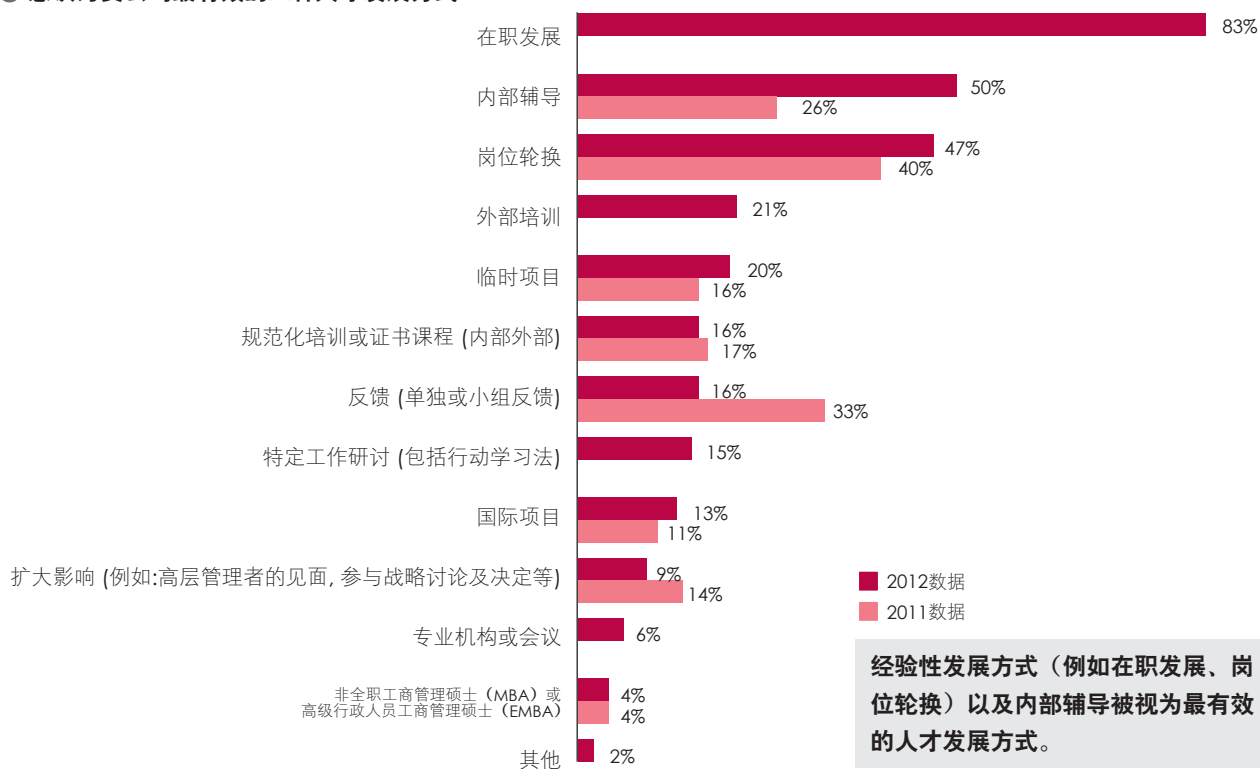


与结构化行为面试相比，基于管理者经验的面试方法（经常使用于直线经理）的信度和效度相对较弱。

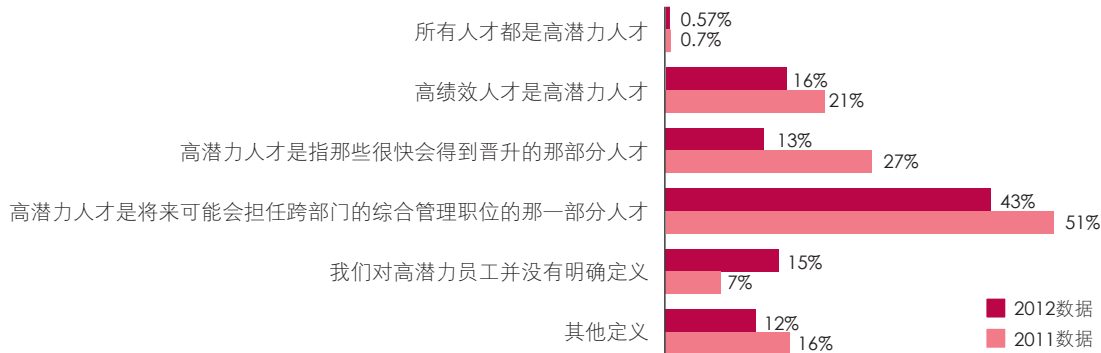
## ⑪ 贵公司已经使用过的三种人才发展方式



## ⑫ 您认为贵公司最有效的三种人才发展方式

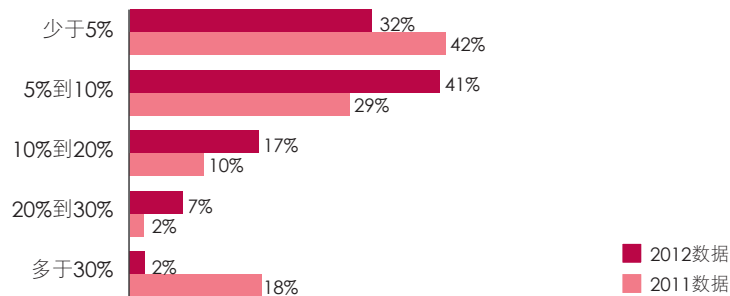


### 13 贵公司对于“高潜力人才”的定义



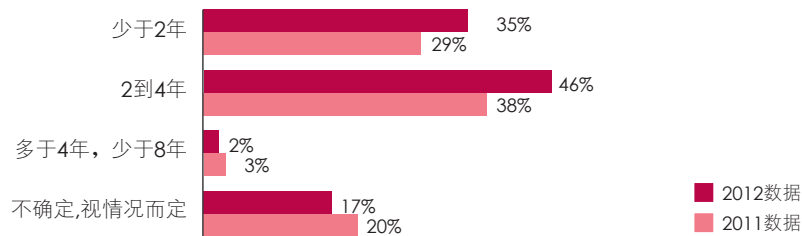
这些结果与去年相比没有很大变化。一些企业对什么是高潜力人才仍然没有一个清晰的定义。

### 14 贵公司高潜力员工在同级员工中的比例



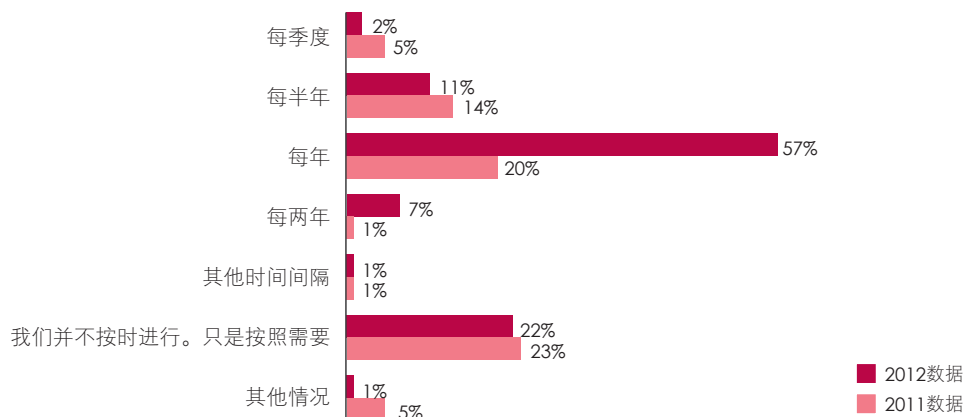
与西方国家的企业相比（高潜力员工所占比例少于5%），在中国的企业中，高潜力员工在同级员工中的比例一般为5%-10%。

### 15 贵公司高潜力人才平均多久得到提升



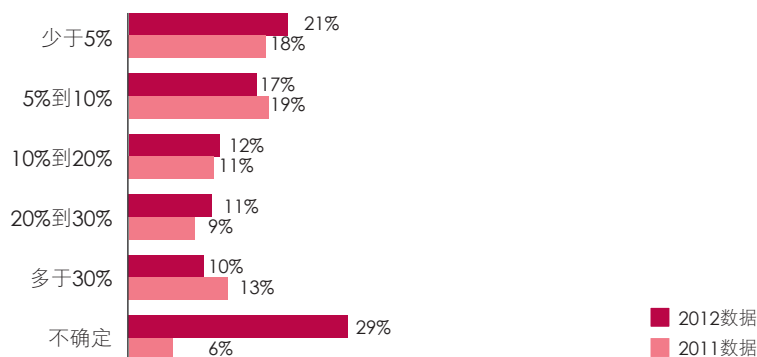
同样的，企业对于高潜力员工的期望值很高，并且他们得到提升的时间也更快些。

### 16 贵公司多久进行一次人才盘点与继任者规划讨论



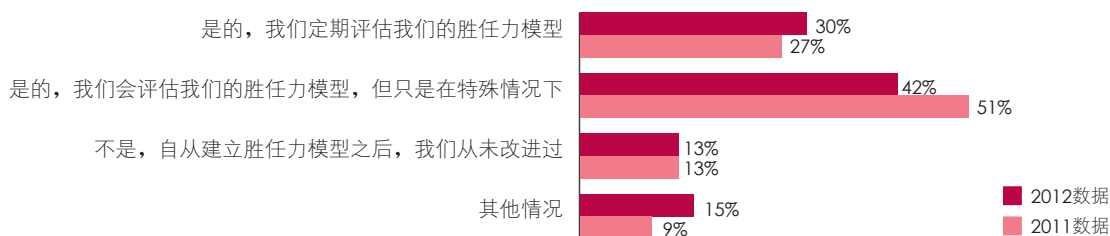
调研结果表明多数企业一般每年进行一次人才盘点与继任者规划讨论会。然而从西方国家的研究表明，他们会更经常地进行盘点和讨论（每年多次）来提高继任者计划的质量和有效性。

### 17 贵公司通过高潜项目而完成继任者计划的成功率



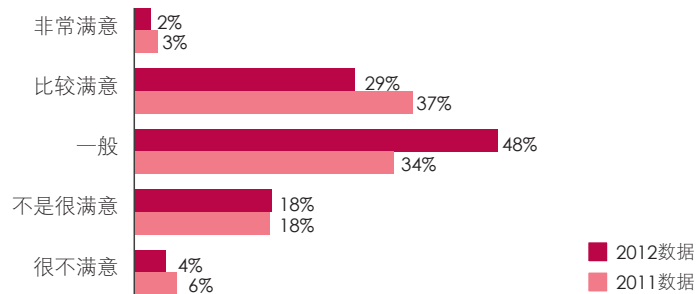
与去年的数据相比，今年得到的数据显示在继任者计划的有效性方面没有显著的提升。

### 18 贵公司是否评估并改进胜任力模型



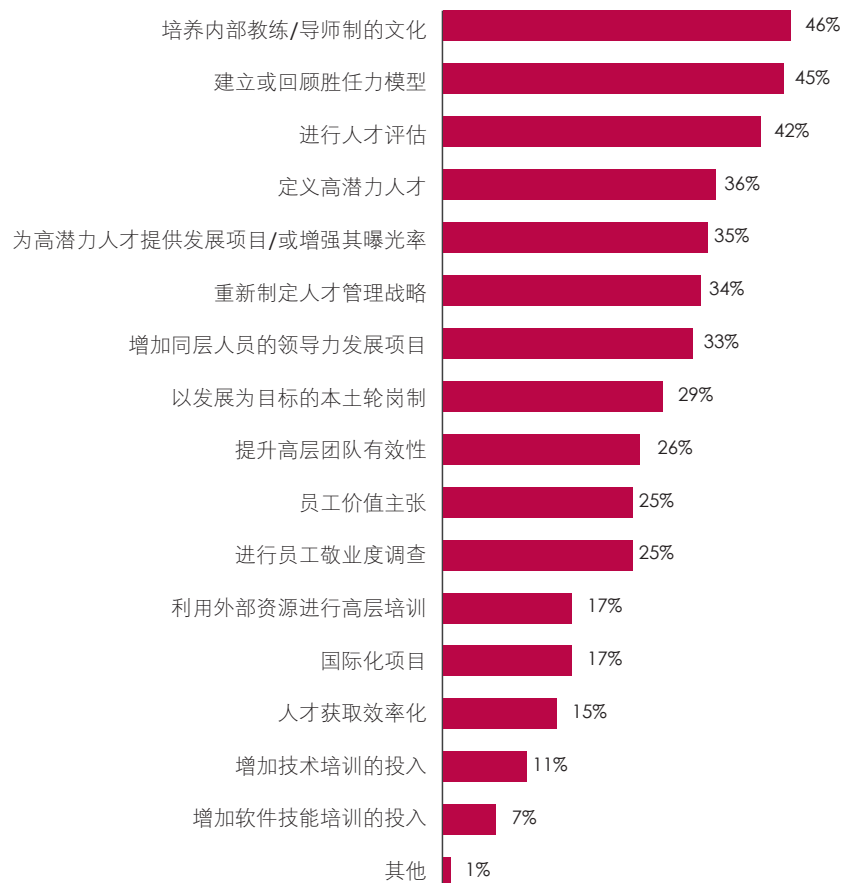
与去年的调研数据相比，今年的调研的结果十分类似，没有太大的变化。

### 19 您对贵公司现有人才管理体系的满意度



与去年的调研数据相比，今年所得到的发现非常相似。

### 20 您认为提高人才管理有效性的方式



数据显示，被选最多的几个项目都与在企业内建立完整的人才管理架构或对企业内部人才做整体了解有着密切的关系。这表明建立健全一个结构良好的人才体系对于大多数企业来说是至关重要的。

## 第三部分 行业数据

在这部分，我们公布调研中五个主要行业的一些指标性数据。每个行业的样本量约占总调研样本量的10%以上。

### 行业分布

行业	参与数			占总样本的%		
生命科学	46			13%		
机械制造	42			12%		
信息技术	41			12%		
汽车及零部件	37			11%		
消费品	35			10%		
企业规模	生命科学	机械制造	信息技术	汽车及零部件	消费品	
少于100	2%	7%	2%	3%	0%	
100-499	22%	36%	32%	16%	17%	
500-2,499	46%	31%	29%	30%	46%	
2,500-10,000	26%	19%	20%	32%	17%	
10,000以上	4%	7%	17%	19%	20%	
企业性质	生命科学	机械制造	信息技术	汽车及零部件	消费品	
外商独资	74%	93%	51%	65%	69%	
中外合资	11%	0%	15%	30%	9%	
国有企业	7%	5%	12%	5%	9%	
中国私营企业	9%	2%	22%	0%	14%	

### 行业数据

2012年度贵公司在中国的年度员工大致离职率	生命科学	机械制造	信息技术	汽车及零部件	消费品
全部员工	18.3%	14.5%	14.7%	14.0%	18.4%
高潜力员工	9.7%	7.2%	8.0%	7.9%	12.1%
贵公司来年新招员工占现有员工数的比例	生命科学	机械制造	信息技术	汽车及零部件	消费品
10%或者以下	22%	40%	34%	30%	20%
10%-20%	46%	36%	39%	38%	40%
20%-30%	20%	14%	17%	16%	20%
30%-40%	7%	5%	7%	11%	17%
40%-50%	2%	0%	0%	3%	3%
50%或者以上	4%	5%	2%	3%	0%
贵公司离职比例最高的职级	生命科学	机械制造	信息技术	汽车及零部件	消费品
个人贡献者	78%	64%	80%	70%	69%
主管	9%	5%	5%	3%	9%
经理及高级经理	7%	5%	2%	8%	17%
总监	0%	0%	0%	0%	0%
副总裁及以上	0%	0%	0%	0%	0%
高潜力人才	7%	26%	12%	19%	6%

## 行业数据 (续)

贵公司最主要三种人才招聘渠道	生命科学	机械制造	信息技术	汽车及零部件	消费品
校园招聘	52%	40%	66%	57%	41%
内部发展	85%	86%	66%	86%	81%
内部调遣及内部推荐	37%	31%	37%	30%	38%
对手企业雇佣	74%	50%	66%	70%	57%
其他行业雇用	30%	67%	37%	49%	49%
贵公司最注重哪一层级的领导人发展	生命科学	机械制造	信息技术	汽车及零部件	消费品
主管	19%	21%	12%	24%	14%
经理及高级经理	74%	69%	63%	73%	63%
总监	9%	7%	22%	5%	14%
副总裁及以上	4%	0%	2%	3%	9%
贵公司通过高潜项目而完成继任者计划的比例	生命科学	机械制造	信息技术	汽车及零部件	消费品
少于 5%	30%	29%	10%	14%	20%
5%-10%	13%	12%	27%	19%	14%
10%-20%	4%	5%	12%	16%	17%
20%-30%	7%	12%	10%	11%	11%
多于30%	13%	10%	5%	22%	6%
不确定	33%	33%	37%	19%	31%
贵公司高潜力员工在同级员工中的比例	生命科学	机械制造	信息技术	汽车及零部件	消费品
少于 5%	28%	40%	29%	43%	31%
5%-10%	48%	38%	46%	27%	40%
10%-20%	15%	17%	12%	19%	29%
20%-30%	9%	5%	10%	8%	0%
多于30%	0%	0%	2%	3%	0%
贵公司高潜力人才平均得到提升的时间间隔	生命科学	机械制造	信息技术	汽车及零部件	消费品
少于2年	35%	24%	37%	38%	31%
2-4年	46%	57%	41%	43%	49%
4-8 年	0%	0%	2%	8%	0%
不确定, 视情况而定	20%	19%	20%	11%	20%
贵公司多久进行一次人才盘点与继任者计划	生命科学	机械制造	信息技术	汽车及零部件	消费品
每季度	0%	5%	0%	3%	0%
每半年	17%	5%	5%	19%	14%
每年	57%	67%	56%	54%	54%
每两年	7%	2%	7%	11%	9%
我们并不按时进行, 只是按照需要	20%	19%	32%	11%	17%
对公司现有人才管理体系的满意度	生命科学	机械制造	信息技术	汽车及零部件	消费品
非常满意	2%	2%	5%	0%	0%
比较满意	33%	26%	29%	35%	34%
一般	37%	45%	49%	51%	43%
不是很满意	28%	21%	15%	8%	17%
很不满意	0%	5%	2%	5%	6%



## 建议



人才管理是一项长期工作，因此必须更加具有前瞻性。在未来的几年内，业务环境的不确定性会更加明显，因此，人才管理的实践必须适应这样的变化。我们建议：

- ✦ 在人才测评与发展的方面，关注**敏锐度**等动态因素。而不仅仅是基于过去或现在对于胜任力的需求。
- ✦ 绝大多数人才是在经济高速成长期发展起来的，但是未来的成功领导必须具备管理成长与低落的业务环境。人才管理的实践如果能够适应这样的变化，积极地培养“**能够引领企业在艰难环境下成长的领导人才**”，才能使您的业务更具竞争力。
- ✦ 提高对培养关键人才的重视程度，特别是**高级领导人才**；而非执行层面的人才或者是一线经理。之前出版的关于新兴市场人才的报告（比如，《哈佛商业评论》，2008年11月刊）提出，中国的人才市场结构严重失衡，初级人才极度过剩，但是从中层开始一直到中国区乃至亚太区的高层管理者严重缺失。虽然情况在近几年有所改善，但是整体的供求曲线变化不大。因此，把应对高层人才的缺失作为人才管理的重点是非常必要的。我们在去年的报告中也提及此项内容，在今年的报告中，面对现阶段的外部经济环境和人才现状，我们再次强调培养高层人才势在必行。更重要的是，培养高级人才与培养初级人才的方式和手段有很大的不同。您的领导力机器是否足够成熟发展高端人才呢？



总体而言，大部分企业对人才管理的认识逐渐成熟，但是仍然需要继续从简单的提供培训的思维转变到体系化的学习与发展手段，特别是针对高端人才的发展。我们看到很多公司意识到建立内部辅导体系的重要性，但是富有成效的经验在市场上很少。许多公司认为“在职发展”是最有效的发展方式，但只有少部分公司在紧密连接发展需求与相关工作设置方面积累了知识与经验。大部分的公司缺乏相应的系统与机制用以建立和促成“在工作中学习”的思维方式。



人才管理必须定制化，并超越行为素质。不同的人才有不同的需求和动机。如果不能找到企业人才发展的真正问题所在，获得人才管理的高投资回报是非常困难的。



人才保留仍然是重大的挑战。许多受访者指出关键人才的保留是他们最大的挑战之一。关于如何解决这一挑战的方法不在我们本次调研范围之内，但我们建议从领导力的角度看待这一问题。就像很多人说的，“员工加入一家公司，离开一个经理”。这点在高潜力的中层人才中尤为突出，他们更加注重价值观的匹配而不单是金钱或者职位。在好老板的带领下与融洽的团队一起工作创造价值被认为是更具吸引力的。换句话说，直线经理的领导能力比人力资源部门的操作更加起作用。如何驱动和激励80后和90后员工是培养发展直线经理的一个重要专题。

## 关于作者

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林光明先生是光辉人力资源咨询有限公司大中华区人才管理与领导力咨询业务的董事总经理，致力于在高管层的领导力咨询，包括领导力素质模型设计与运用、领导力测评、高管教练和培训、和高管团队有效性等。林先生服务过上百家在各行各业的顶尖企业，自 2002 年以来辅导过数十名中国区总裁、副总裁级别的高管。

林先生曾就职于美世咨询 (Mercer)，负责大中华区人力资本咨询业务，此前还曾供职于合益集团 (Hay Group)。

作为一个经常活跃在中国高端人力资源和人才管理研讨会的演讲者，林先生也在很多诸如中文版哈佛商业评论、华尔街日报等期刊上发表文章，是《商业评论》编辑委员会成员，并荣膺其十年来最具洞察力和启发性的十佳作者。

林先生毕业于上海交通大学，获得工程学士及硕士学位，并在新西兰获得梅西大学 (Massey University) 的 MBA 学位。

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吴滨博士现任光辉人力资源咨询有限公司上海办公室人才管理与领导力咨询业务的高级顾问。在加入光辉国际之前，吴博士任职于美国迈阿密大学 (University of Miami) 工商管理学院管理系并担任助理教授。他的研究课题包括领导力和团队。他不仅在学术界和企业界高影响力的杂志上发表过多篇论文，也从事本科和工商管理硕士课程的教学。在进入学术领域之前，吴博士曾在翰威特咨询公司 (Hewitt Associates) 和 TMP Worldwide 任职人力资源顾问。

吴博士毕业于美国亚利桑那州立大学 (Arizona State University) W. P. Carey 工商管理学院并取得管理学博士学位，专攻组织行为学。他是美国管理学学会 (Academy of Management) 和中国管理研究国际学会 (International Association of Chinese Management Research) 的会员。

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### KORN/FERRY INTERNATIONAL

#### 关于光辉国际人才管理与领导力咨询业务

光辉国际 (NYSE: KFY) 是全球第一大提供人才管理解决方案的咨询公司，在 40 个国家有超过 90 个办公室。公司总部设在洛杉矶，提供一系列的解决方案，以帮助客户鉴别，安置，保留，以及奖励他们的人才。

不同于高管搜索业务，光辉国际的人才管理与领导力咨询业务 (LTC) 帮助企业改善组织绩效，提升高层领导力，并优化人才管理项目。光辉国际的全球顾问团队，凭借以研究为基础，市场为导向的深度透视，丰富的解决方法及工具，为客户提供人才管理与领导力发展方面的解决方案。



#### 关于人力资源智享会

人力资源智享会 (HREC) 是一个会员制的组织。面向中国人力资源领域的专业人士，致力于促进其技能和胜任能力的提升，从而帮助他们在竞争激烈的知识经济中脱颖而出；同时推动中国人力资源行业的发展。

人力资源智享会为每一位会员提供一个整合线上知识、线下活动的平台，和中国最顶尖的专业人士共同讨论中国人力资源实践中最热门、最前沿的话题。这个平台包括 HRD Network, 专业会议和论坛，专业培训，人力资源前沿，行业工作组，每月新知，HR Value 杂志，电话会议，功能强大的网络平台以及调研与报告等一系列具有高附加值的产品和服务。

## Acknowledgement

We thank all the participating organizations and survey respondents for your support. We further extend our gratitude to the following HR leaders for their insight during our interviews.



**Helen Gu**

HR Director  
Johnson Controls, Automotive Experiences  
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**Jinsong Xu**

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Alcatel Lucent China



**Rebecca Liu**

HR Director  
Wacker Chemical Greater China



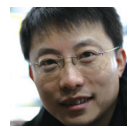
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TCL Group



**Hui Zhang**

Vice President of HR & Administration  
Changan Ford Mazda Automobile Co., Ltd.  
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Last but not the least, the survey and report wouldn't be possible without Grace Zhu's dedicated work in data collection, coordination and analyses. Thank you all!


## Executive Summary

### The Business Context

Macro economy and business context have profound impact on talent landscape and talent management strategies. In the past year, the economic turmoil in Europe and the sluggish economic condition in U.S. generated ripple effects all over the world; and China is not an exception. Based on the report published by International Monetary Fund (IMF), the “mild recession” from the euro zone dragged the global growth rate down by ¼ percent. Though China economy remains relatively optimistic compared with other regions, the pace of the growth slows down. “At a time when much of the rest of the globe would fall into recession, China should be prepared to tolerate modestly lower growth in the near term while cushioning the impact.” (China Economic Outlook, IMF, 2012)

The weak economy in the West puts China onto the stage. Most multi-national organizations regard China as a high potential growth engine and are positive about the business outlook in China. The European Union Chamber of Commerce in China reports in their Business Confidence Survey 2012 that 78% of the organizations participating in the survey feel continuously optimistic about business growth in China in the next two years. Further, most of them target China customers when producing products and providing services. That said, the increasing maturity level of China market comes together with the surge of labor cost. Put differently, the low-cost and western-centric strategy might become obsolete. To turbo the China engine, organizations need talents who are willing and capable to quickly adjust themselves and perform effectively under changing business environment. They need to understand China market, leverage global resources, and provide creative and integrative services to customers so as to further drive business growth in the slowdown or even flat economy .

## Key Findings

-  **Current Talent Market** is very much operation-focused. Most companies are fighting for operational talent in terms of both quality and quantity. Finding technical specialists or first-line managers who can get things done effectively remains a key concern.
-  **Talent Engagement Drivers** shift from learning and promotion opportunity to a sense of achievement and job security when people grow older. Good Pay, however, remains one of the top three drivers.
-  Most talent management programs are HR-driven, with the focus on **junior to middle-level** managers.
-  Behavior-based interview and 360 survey are most frequently used **assessment** approaches
-  Top three most **effective** development approaches include on-the-job development, job rotation, and internal mentoring.
-  Results show improvements on **high potential** identification and development practices. More organizations increased the dose of high potential program and focus their investment on a smaller talent pool (less than 10%) .
-  Fostering **coaching culture** is on top of most talent managers' priority list for 2013.

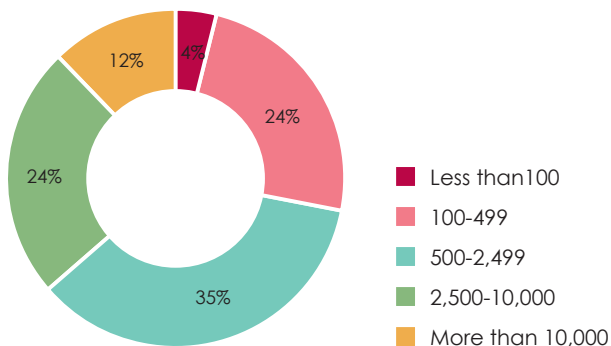
## About the Survey

We conducted the survey from May 2012 to August 2012 and collected 364 initial responses via HR Excellence Center events (151 responses) and an online survey webpage (213 responses). After deleting responses from the same organization, invalid and incomplete responses, the final sample consisted of 350 valid responses from 350 organizations. Below are the demographics of the sample.

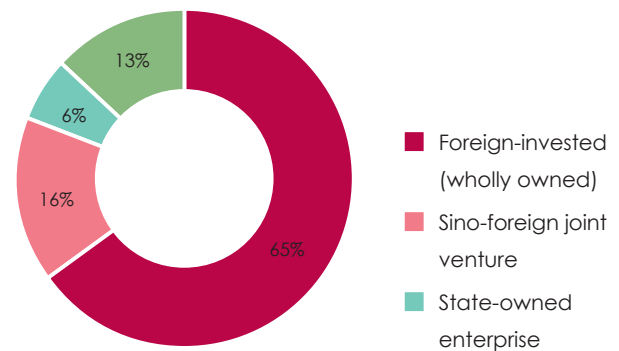
### Industry breakdown

Industry	Sample Size	% of Total Sample
Life science	46	13%
Equipment & machinery	42	12%
Information technology	41	12%
Automotive & parts	37	11%
Consumer	35	10%
Chemicals & petro-chemicals	23	7%
Professional services	23	7%
Manufacturing	19	5%
Financial services	15	4%
Retail & e-commerce	12	3%
Electrics & electronics	9	3%
Energy & power	9	3%
Transformation & logistics	7	2%
Others	32	9%

### Number of employees in mainland China

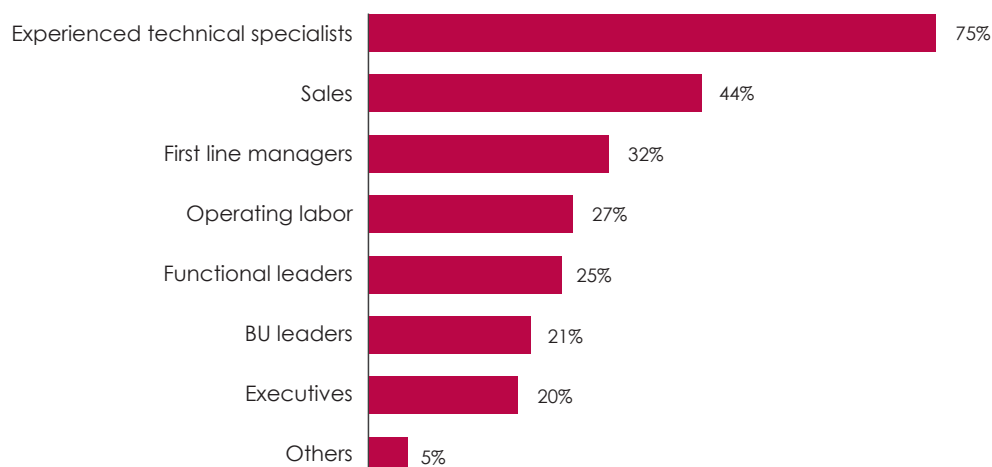


### Ownership structure



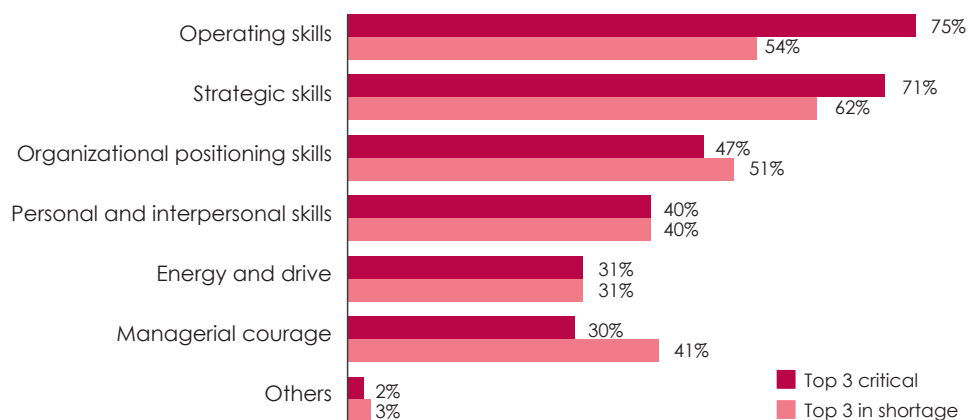
## Part I Talent Landscape

### ① The top three talent categories that are in shortage in your company are



*Technical specialists and sales are the top two most wanted talent categories, suggesting that most organizations still focus on operation and execution. In addition, the increasing number of R&D centers is another reason why technical experts are needed.*

### ② The top three leadership competencies that you believe are most critical for your organization and in shortage in the market are



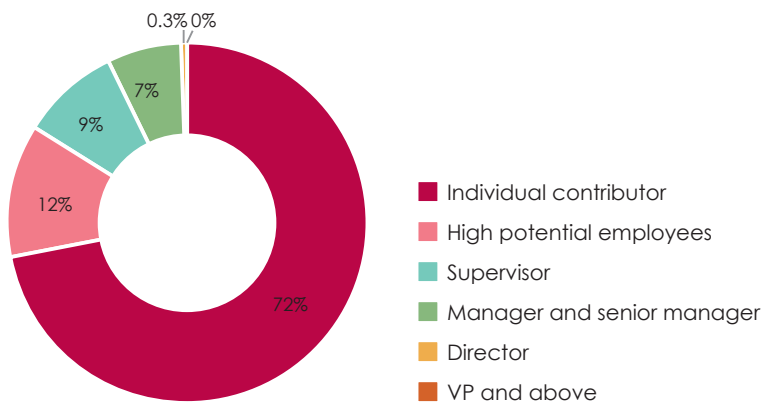
*Apparently, those competencies that are perceived critical are the ones in shortage. Again, operation skills is perceived as the most critical competency category.*

### ③ Annual employee turnover rate in mainland China



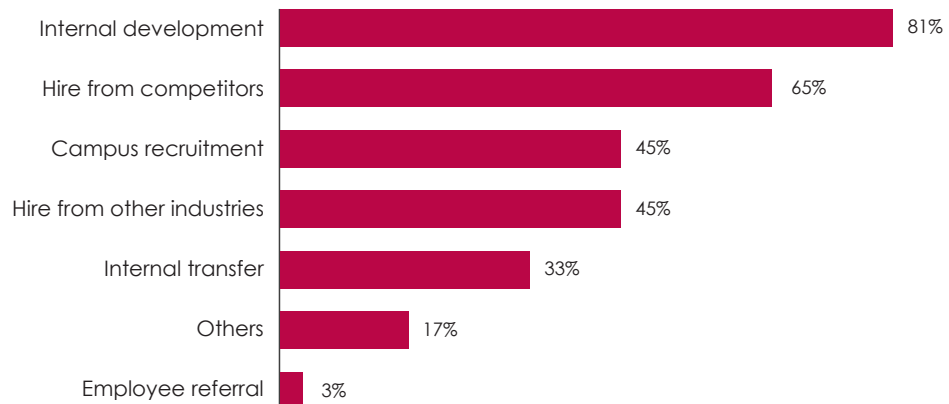
*It seems that the talent market is relatively active. High potential turnover rate is significantly higher than that of last year, which warrants our attention.*

### ④ At which level does most of the turnover occur?



*Results echo the finding that technicians and sales are most wanted talent in the current market.*

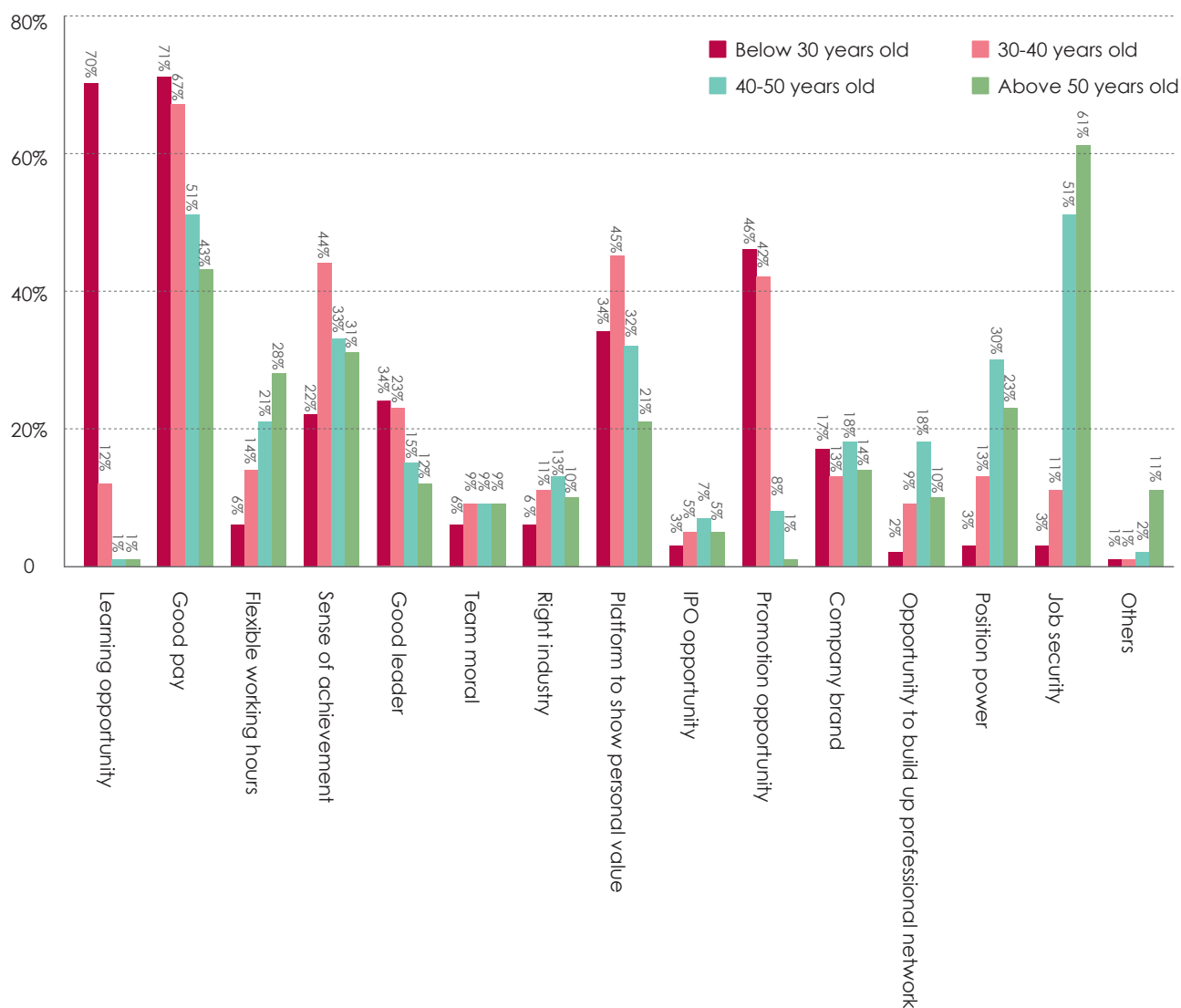
### ⑤ The top three recruitment channel



*Internal development and promotion becomes the top recruitment channel, suggesting that most organizations prefer development approach to buy strategy.*



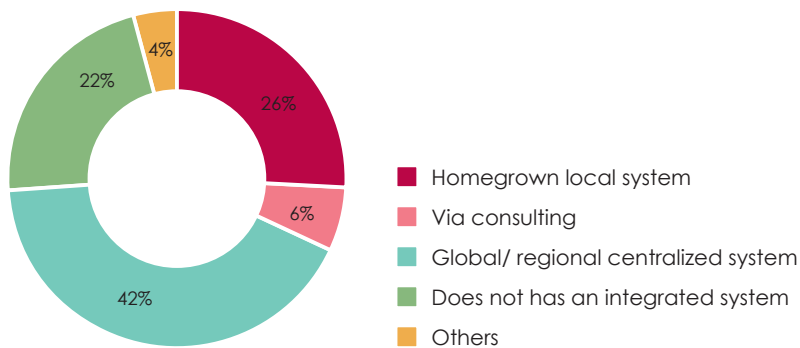
## 6 The top three important engagement drivers across different age groups



Rankings of good pay, good leader and promotion go down though compensation remains one of the top three engagement factors. Rankings of flexible working hours and job security go up. Also, learning is not perceived as a powerful engagement factor, especially for senior people, which is not a good sign from a leadership development perspective.

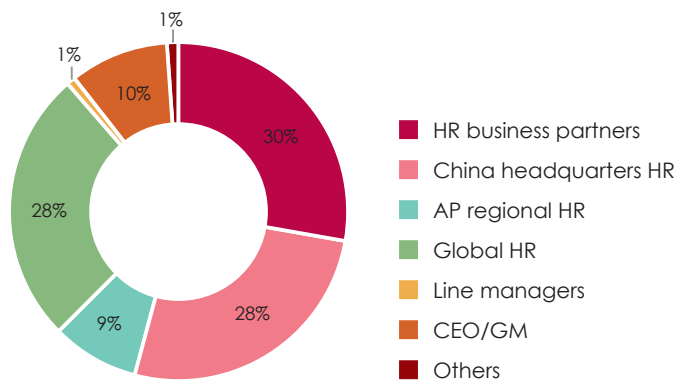
## Part II Talent Management Landscape

### 7 Where are your talent management systems originated from?



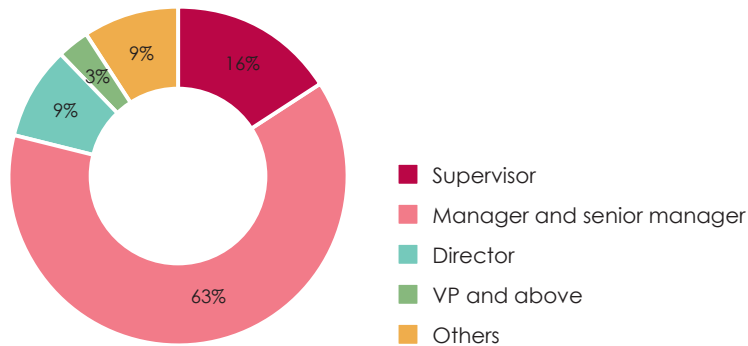
**Compared with last year, most companies are designing or launching talent management systems based on local context and needs.**

### 8 The driving force behind your talent management programs



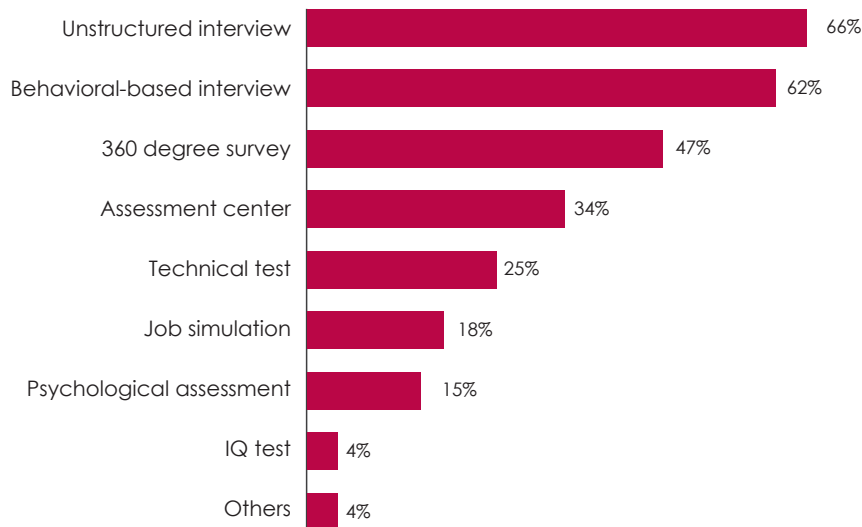
**It's good to see that some business leaders (CEOs and GMs) are driving talent development initiatives. That being said, the percentage is not very high compared with a global norm (65%; Economist Intelligence Unit, 2010).**

9 Which level(s) of leaders do you currently focus for development?



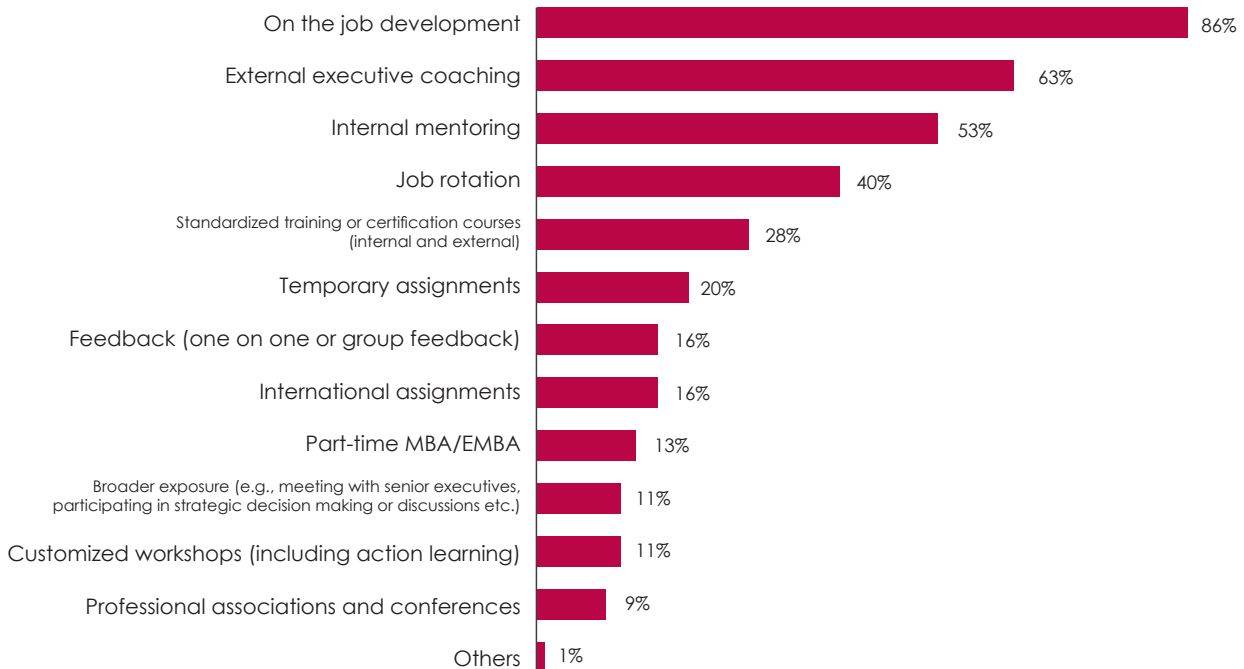
*Results are very similar to that from last year's survey. Middle-level leaders are still the focus of development.*

10 The top three most often used talent assessment methods are

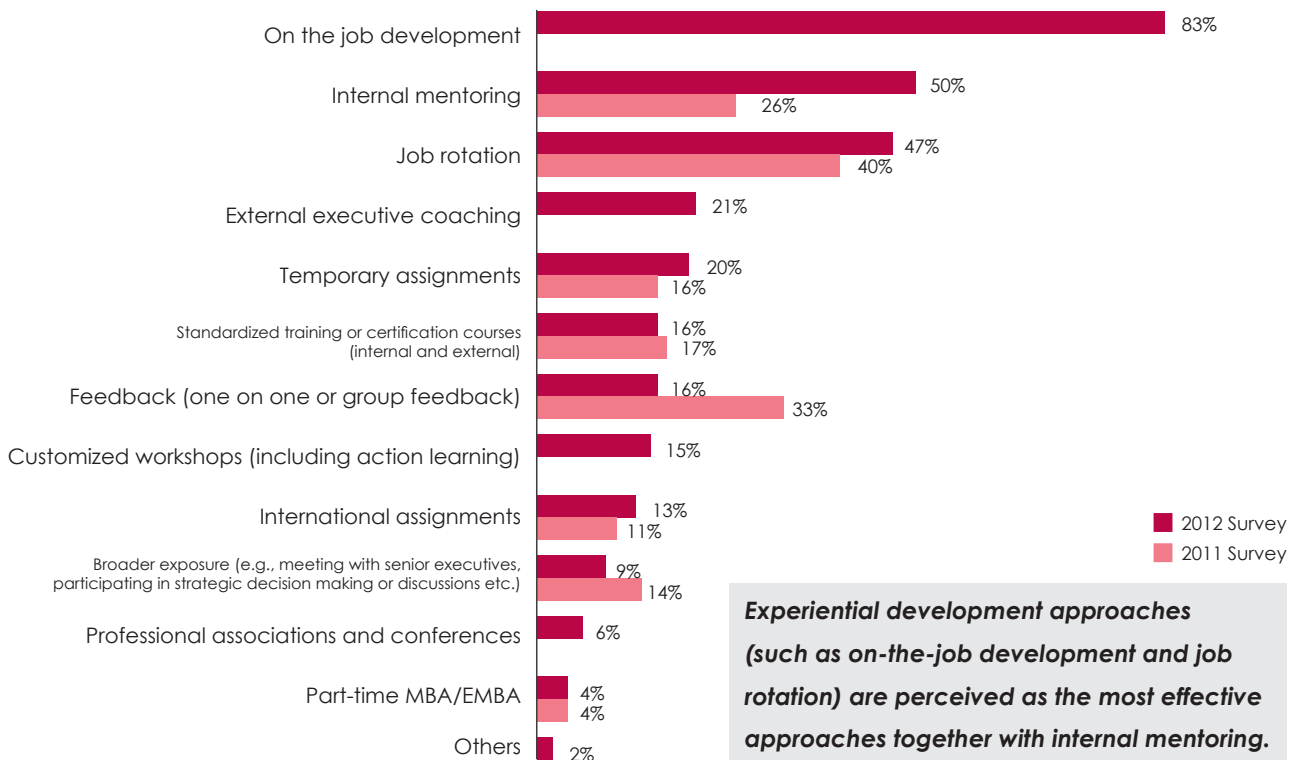


*Unstructured experience-based interview (often used by line managers) might not be reliable and valid compared with structured behavioral interview methodology.*

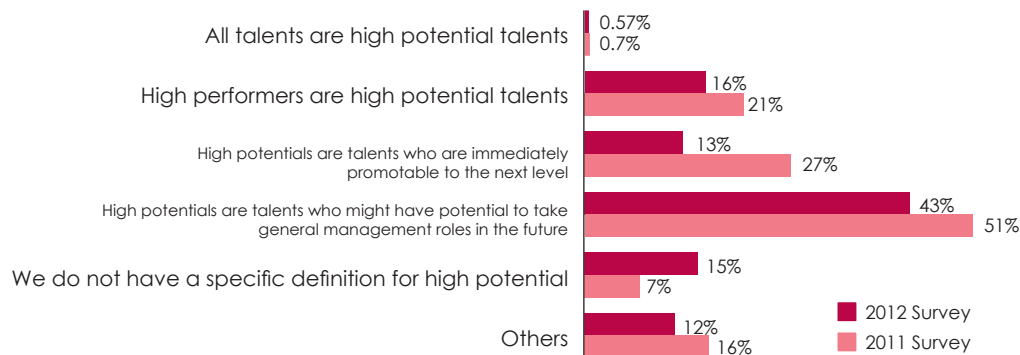
### 11 The top three development approaches you have been using in your company are



### 12 The top three development approaches you believe the most effective are

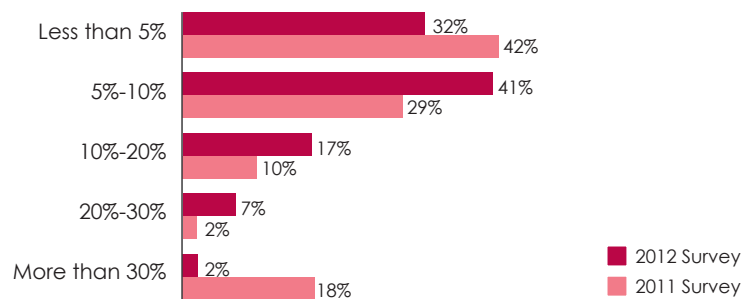


### 13 Definition of "high potential" in your organization



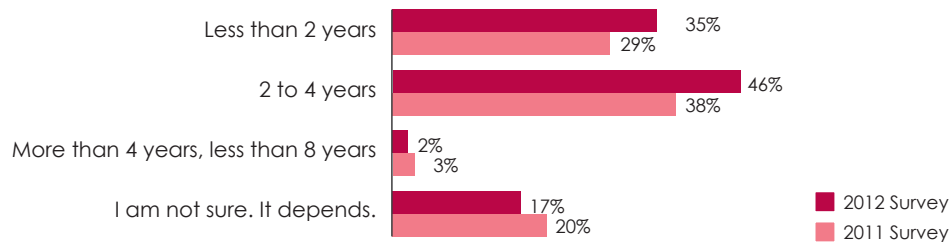
**No significant changes from last year's results. Quite a few organizations still do not have a clear definition of high potential.**

### 14 What is the percentage of high potential employees at the same level across all functions in your organization?



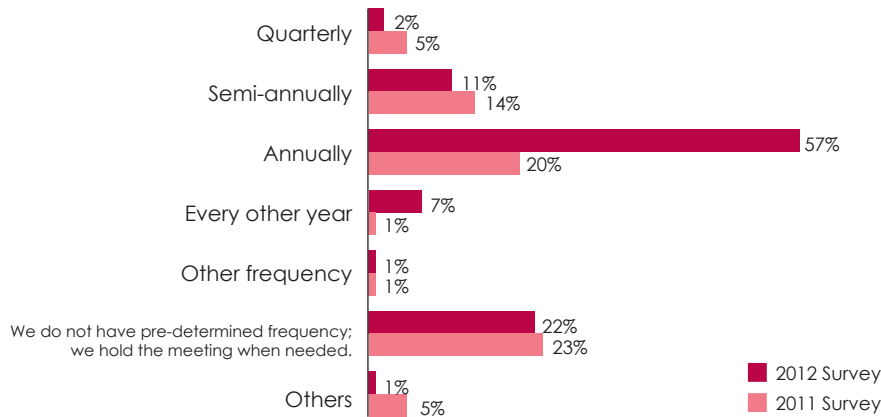
**It seems that 5-10% becomes a common practice in China compared with a more strict criteria (less than 5%) in the West.**

### 15 In general, how long does it take for a high potential talent to be promoted to the next level position?



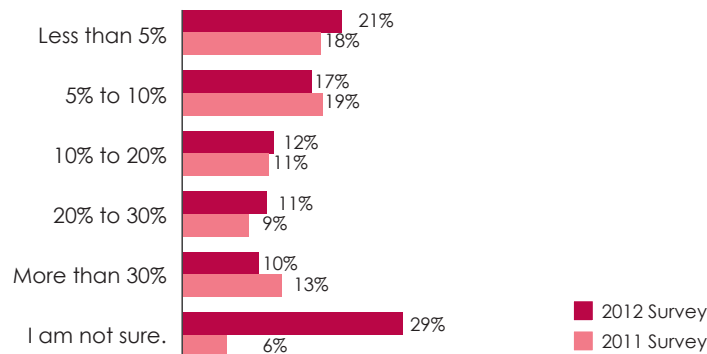
**Results show that expectations toward high potentials are high; and promotions are awarded quickly.**

### 16 How often do you conduct talent review and succession planning?



**Annual review becomes a common practice. Research from the West, however, suggests that conducting talent review more often (more than one time each year) increases the quality and effectiveness of succession planning.**

### 17 What is the success rate of leadership succession via high potential program in your organization?



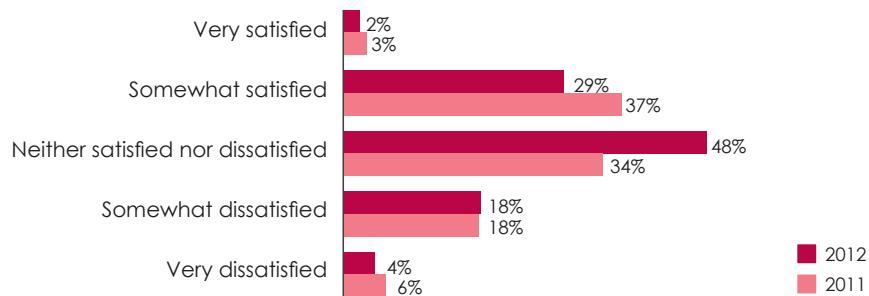
**No significant improvement compared with the data from last year.**

### 18 Do you review and revise your competency model?



**Similar findings compared with data from last year's survey.**

### 19 Overall, are you satisfied with your current talent management system?



**Similar findings compared with data from last year's survey.**

### 20 What do you plan to do more to enhance your talent management effectiveness?



**Most top-rated items are related to establishing an overarching framework or having a big-picture view of talent within the organization, suggesting that having a well-structured talent system is essential for most organizations.**

## Part III Industry Highlight

In this section, we present survey data on five industries. Each one represents 10% or more from the total survey sample.

### Sub-sample demographics

Industry	Sub-sample size		% in the total survey sample (N=350)		
Life science	46		13%		
Machinery	42		12%		
Information technology	41		12%		
Automotive	37		11%		
Consumer	35		10%		
Number of employees in mainland China	Life Science	Machinery	Information Technology	Automotive	Consumer
Less than 100	2%	7%	2%	3%	0%
100-499	22%	36%	32%	16%	17%
500-2,499	46%	31%	29%	30%	46%
2,500-10,000	26%	19%	20%	32%	17%
More than 10,000	4%	7%	17%	19%	20%
Ownership structure	Life Science	Machinery	Information Technology	Automotive	Consumer
Foreign invested (wholly owned)	74%	93%	51%	65%	69%
Sino-foreign Joint venture	11%	0%	15%	30%	9%
State owned enterprise	7%	5%	12%	5%	9%
Private-owned enterprise	9%	2%	22%	0%	14%

### Industry data

Annual employee turnover rate 2012	Life Science	Machinery	Information Technology	Automotive	Consumer
All employees	18.3%	14.5%	14.7%	14.0%	18.4%
High potential employees	9.7%	7.2%	8.0%	7.9%	12.1%
New hire/curreant employee rate	Life Science	Machinery	Information Technology	Automotive	Consumer
Below 10%	22%	40%	34%	30%	20%
10%-20%	46%	36%	39%	38%	40%
20%-30%	20%	14%	17%	16%	20%
30%-40%	7%	5%	7%	11%	17%
40%-50%	2%	0%	0%	3%	3%
50% and above	4%	5%	2%	3%	0%
Level with highest turnover rate	Life Science	Machinery	Information Technology	Automotive	Consumer
Individual contributor	78%	64%	80%	70%	69%
Supervisor	9%	5%	5%	3%	9%
Manager & senior manager	7%	5%	2%	8%	17%
Director	0%	0%	0%	0%	0%
VP and above	0%	0%	0%	0%	0%
High potential	7%	26%	12%	19%	6%



## Industry data ( continued )

Top 3 recruitment channels	Life Science	Machinery	Information Technology	Automotive	Consumer
Campus recruiting	52%	40%	66%	57%	41%
Internal promotion/development	85%	86%	66%	86%	81%
Internal transfer/referral	37%	31%	37%	30%	38%
Hire from competitors	74%	50%	66%	70%	57%
Hire from other industries	30%	67%	37%	49%	49%
Most focused level for development	Life Science	Machinery	Information Technology	Automotive	Consumer
Supervisor	19%	21%	12%	24%	14%
Manager and senior manager	74%	69%	63%	73%	63%
Director	9%	7%	22%	5%	14%
VP and above	4%	0%	2%	3%	9%
Succession planning success rate via high potential program	Life Science	Machinery	Information Technology	Automotive	Consumer
Less than 5%	30%	29%	10%	14%	20%
5%-10%	13%	12%	27%	19%	14%
10%-20%	4%	5%	12%	16%	17%
20%-30%	7%	12%	10%	11%	11%
More than 30%	13%	10%	5%	22%	6%
Not sure	33%	33%	37%	19%	31%
High potential percentage at the same level	Life Science	Machinery	Information Technology	Automotive	Consumer
Less than 5%	28%	40%	29%	43%	31%
5%-10%	48%	38%	46%	27%	40%
10%-20%	15%	17%	12%	19%	29%
20%-30%	9%	5%	10%	8%	0%
More than 30%	0%	0%	2%	3%	0%
High potential promotion	Life Science	Machinery	Information Technology	Automotive	Consumer
Within 2years	35%	24%	37%	38%	31%
2-4 years	46%	57%	41%	43%	49%
4-8 years	0%	0%	2%	8%	0%
Depends	20%	19%	20%	11%	20%
Talent review frequency	Life Science	Machinery	Information Technology	Automotive	Consumer
Quarterly	0%	5%	0%	3%	0%
Semi annually	17%	5%	5%	19%	14%
Annually	57%	67%	56%	54%	54%
Every other year	7%	2%	7%	11%	9%
No pre-determined frequency	20%	19%	32%	11%	17%
Talent management system satisfaction	Life Science	Machinery	Information Technology	Automotive	Consumer
Very satisfied	2%	2%	5%	0%	0%
Somewhat satisfied	33%	26%	29%	35%	34%
Neutral	37%	45%	49%	51%	43%
Somewhat dissatisfied	28%	21%	15%	8%	17%
Very dissatisfied	0%	5%	2%	5%	6%

## Our Recommendations



As talent development is a longer-term initiative, it needs to be more foresight. Business environment is becoming more ambiguous in the coming few years, therefore, talent management practice also need to address the change. We recommend to:

- + Put more effort on the **agility** part, both in assessment and development, instead of only base on past or current understanding on competency requirements.
- + Most talent have been grown under "fast growth" economy, while future successful leaders need to be able to lead in both growth and down-turn business environment. Talent management practices which address this change and proactively develop "**smart growth leader**" (who can continuously generate business growth in tough situations) will provide competitive edge to your business.
- + Increase attention on developing your key talent, especially those **senior talent**, instead of only on the execution talent and first line managers. Previous reports on talent market in emerging economy (e.g., Harvard Business Review, Nov 2008) suggest that talent supply in China is severely imbalanced with large surplus at entry level and significant deficit starting from middle management all the way to country and regional leadership positions. Though situation might have been improving, the general supply curve might remain the same. Therefore, aligning your talent management effort to address the talent deficit at senior is necessary. We highlighted this point in last year's survey; we re-emphasize its imperativeness given the current talent context and the potential expatriate reflux. Furthermore, the way of developing senior leaders can be quite different from that of developing junior ones. Does your leadership machine mature enough to develop senior leaders?



Overall understanding on talent development is improving, but organizations still need to continue shifting from purely training mindset to comprehensive learning and development efforts, especially when targeting at senior level talent. We've seen that many companies are aware of the importance of building coaching culture, but solid practical experiences are scarce in the market. While many companies agree that "on-the-job development" is the most effective approach, few has rich knowledge and experience on matching development needs with right stretching assignments. Even less organizations have processes or mechanisms to foster thinking on "what do you learn from the assignment".



Talent management has to be customized, and go beyond competency. Different talent has different needs and motivation. Without addressing the right issues, it's hard to get high ROI from the talent management efforts.



Retention continues to be a challenge. A lot of survey respondents pointed out that key talent retention is one of their biggest challenges. Though a comprehensive solution to this challenge is beyond the scope of the survey, we suggest viewing this challenge with a leadership perspective. As many said, "Employees join a company and leave a manager". This is especially true for high-potential middle-level talent, who are more motivated by value alignment instead of purely financial reward or position power. Working in a right team under a good manager to create result together makes more sense to them. In other words, direct supervisors' leadership capability has more powerful impact on their talent than HR procedures. How to engage and motivate post-80 or post-90 generation employees can be an important topic when developing line leaders.

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Mr. Jack Lim is the Managing Director of Korn/Ferry International's Leadership & Talent Consulting business in Greater China, focusing on leadership consulting at executive level, which include leadership competency modeling and application, executive assessment, executive coaching and training, and top team effectiveness. In his over one decade leadership

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KORN/FERRY INTERNATIONAL

### About Korn/Ferry International, Leadership & Talent Consulting

Korn/Ferry International (NYSE: KFY), with more than 90 offices in 40 countries, is a premier global provider of talent management solutions. Based in Los Angeles, the firm delivers an array of solutions that help clients to identify, deploy, retain, and reward their talent.

Different from executive search, Korn/Ferry Leadership and Talent Consulting (LTC) helps companies improve the effectiveness of their organizations, executive leadership and talent management programs. LTC solutions are delivered by a global team of consultants, supported by research-based and market-leading intellectual property, methodologies and tools.



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HR Excellence Center (HREC) is a membership based organization which is created to improve the competencies and capabilities of HR practitioners and advance the development of HR as a profession in China.

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2012 CHINA TALENT MANAGEMENT LANDSCAPE SURVEY REPORT

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