

THE ODGERS BERNDTSON  
**LEADERSHIP**  
CONFIDENCE INDEX  
2020



ODGERS BERNDTSON

IN ASSOCIATION WITH

**HARVARD BUSINESS REVIEW  
ANALYTIC SERVICES**

**DISRUPTION:  
A CRISIS OF  
CONFIDENCE**



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# EXECUTIVE SEARCH, INTERIM APPOINTMENTS & LEADERSHIP ASSESSMENT & DEVELOPMENT



# MESSAGE FROM OUR CEO

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**Kester Scrope**  
Chief Executive Officer  
Odgers Berndtson



**This study makes it clear that there is a crisis of confidence among business leaders – across geographies and sectors – in facing today’s disruptive forces, most notably the pace of change and the shortage of qualified talent.**

Whilst the headline may be worrying, we provide valuable insight into the leadership and organisational characteristics enabling some companies to face these challenges with confidence.

To win the competition for talent, leaders must offer an attractive sense of purpose and vision in addition to pay, reward and career progression. These are all qualities long looked for in leaders but it is clear that a strong sense of purpose has become more important in the mix to attract and retain the best talent. Poorly presented organisations will not be able to attract the talent they need.

To have organisational agility requires an empowering ethos across the leadership, enabling companies to adapt quickly across multiple fronts. This implies the need for a less hierarchical and more values-based structure.

The need for agility at the personal level is also demanding a greater focus on the “mindset” of leaders. To succeed through disruption, qualities such as strategic thinking, resilience, and adaptability will be more highly valued than some of the conventional “skillset” attributes such as digital acumen and analytic skills. With companies facing many challenges for the first time, assessing leaders’ potential becomes as important as scrutinising past achievements.



“Poorly presented organisations will not be able to attract the talent they need”



# WHERE HAS THE CONFIDENCE IN LEADERSHIP GONE?

**95%\* of senior executives around the world believe that managing disruption well is vital to the success of their organisations, yet a staggering 85%\* lack confidence in their own leadership team's ability to successfully navigate through disruptive times. Moreover, only 16%\* of leaders say disruption has been well managed to date.**

The Odgers Berndtson Leadership Confidence Index reveals a clear crisis of confidence in top global leaders. The study, developed with Harvard Business Review Analytic Services, surveyed nearly 2,000 global executives and senior managers, representing companies with revenues ranging from \$50 million to over \$5 billion. The study finds that just 15% appear confident that their leaders can deliver long-term success amid increasingly disruptive forces. Almost a quarter (24%) report very low confidence.

Disruption in business is hardly new, but the accelerating pace of change, coupled with economic insecurity, makes these figures very unsettling. As business leaders struggle to manage rapidly changing stakeholder expectations and technological,

environmental, and political uncertainty, there's solid consensus amongst 88%\* of leaders polled that these challenges will only increase over the next five years.

This gap in confidence underlines the critical role of leadership to drive organisations through disruption to success. In the most confident organisations, it is believed that leaders with a powerful mix of the right mindset, focus and attributes can attract and retain the best talent and drive the necessary evolution of their organisations.

This study helps identify the traits and the other factors necessary to develop successful leaders and organisational change. By assessing the confidence placed in leaders against activities and attributes required to respond to changing demands, it provides an in-depth reading of current and future ability to navigate through disruption. Across a balanced spread of sectors and company sizes, there are remarkably consistent results. Comparisons of leaders' skills, experiences, motivations and behaviours indicate the differences between respondents who are confident about future success and those that fear that future.

# LESSONS FOR LEADERSHIP

## ADAPTABILITY IS ESSENTIAL FOR DRIVING GROWTH AND SUCCESS

Today's leaders must find a way to constantly evolve the business strategy, find the resilience to drive it forward, while also being prepared to seize opportunity when it presents itself.

## TALENT IS CRITICAL TO SUCCESS

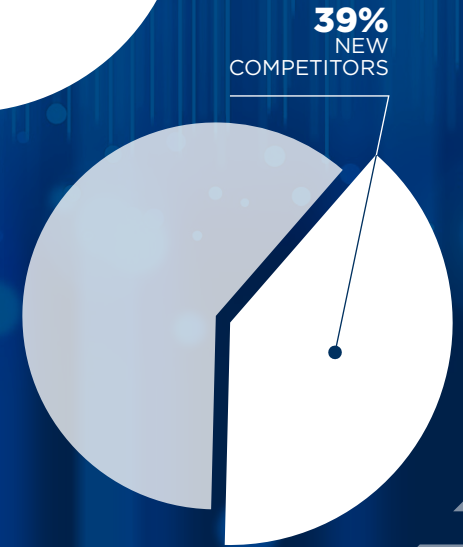
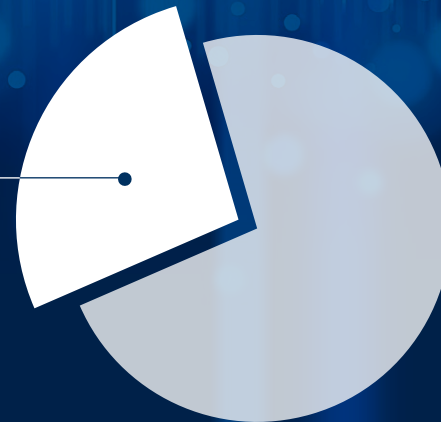
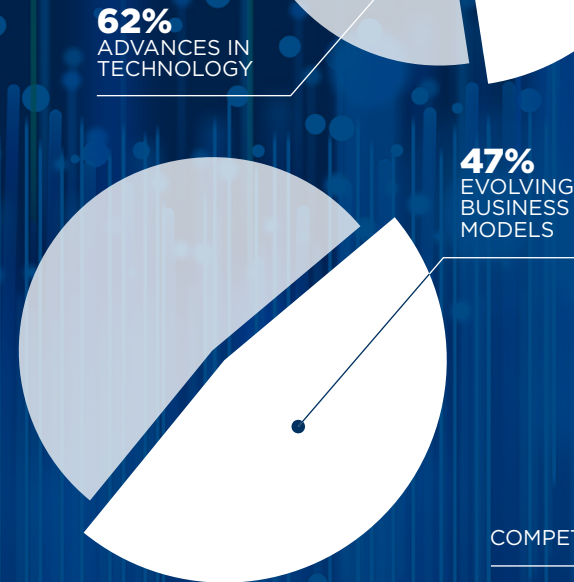
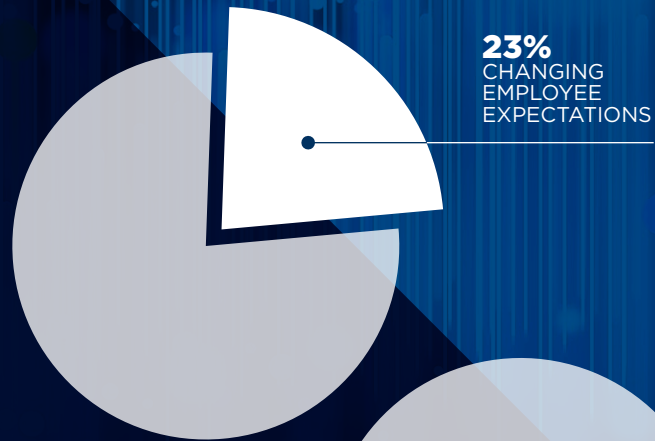
Leaders must prioritise the attraction, retention and development of leadership and implement programmes that cultivate the right behaviours and attributes needed to succeed through continuous change.

## THE MINDSET AND TRAITS REQUIRED FOR STRONG LEADERSHIP IS QUICKLY SHIFTING

Organisations must seek out and develop leaders that can thrive despite uncertainty, leaders that are adaptable, curious and have the courage required for continuous change and the ability to communicate a vision that motivates others.

# TOP DRIVERS OF DISRUPTION

We asked respondents to rank the top disruptive forces:



# ARE TODAY'S LEADERS FIT TO LEAD?

**The Odgers Berndtson Leadership Confidence Index shows that only 16% of senior management surveyed believe that disruption has been managed well to date.\***

After surveying 1,890 senior executives from medium to large, global organisations, the analysis reveals that just 15% feel confident that their leadership team is fit to lead through future disruption, while 24% are “worried” (or not confident). These figures are similar across global regions.



To assess confidence and create an Index, Odgers Berndtson and Harvard Business Review Analytic Services evaluated different leadership attributes and behaviours.

The Index reveals that only a fraction of global executives express confidence that their leadership team has the right values, mindset, skillset, ability to drive change and focus on talent development to thrive in the future and manage disruption well. Overall, respondents see least confidence in driving change and leaders' ability to hire, develop and retain talent.

## STUDY AT A GLANCE

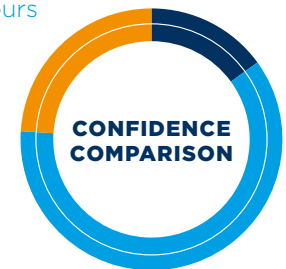
1,890 global respondents representing companies with collective turnover of over \$3 trillion

Research: Odgers Berndtson Autumn 2019



Throughout this report, we compare the perceptions of the most “confident” executives (15% of respondents) against their more “tentative” (61%) and “worried” (24%) counterparts.

These comparisons help us understand the behaviours and traits of the most confident leaders.





# ONLY 15% OF SENIOR MANAGEMENT EXPRESS CONFIDENCE THAT THEIR LEADERSHIP TEAM HAS:

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**THE RIGHT  
VALUES**



**THE RIGHT  
MINDSET**



**THE REQUIRED  
SKILLS**



**THE ABILITY TO  
DRIVE CHANGE**

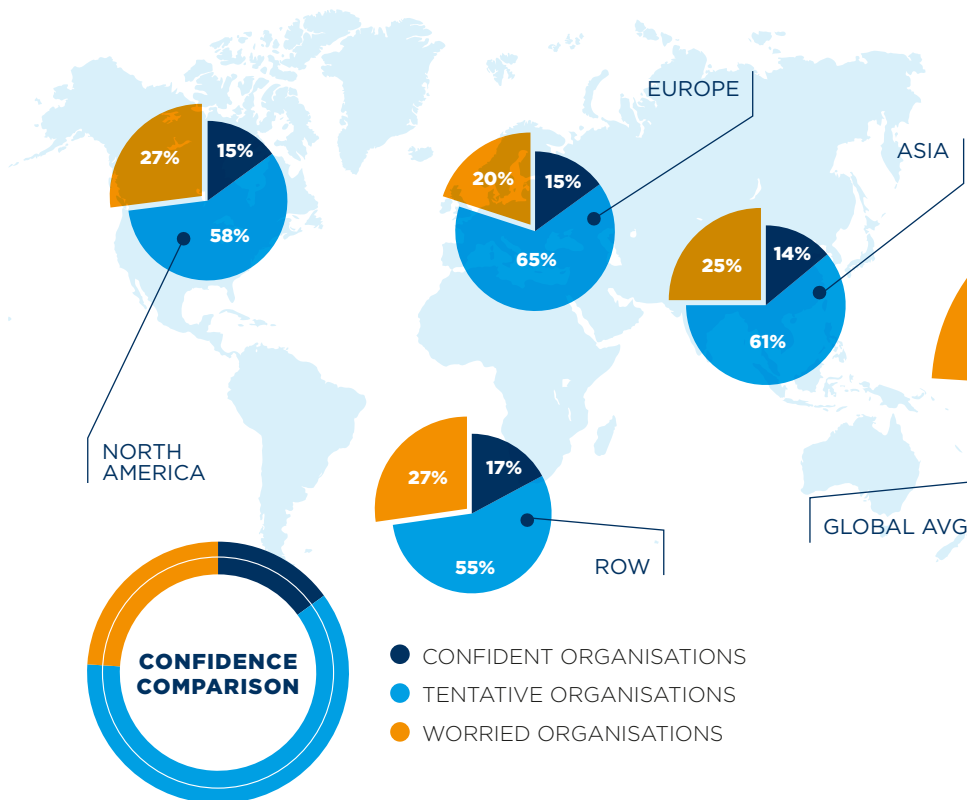


**THE ABILITY TO  
ATTRACT & RETAIN  
THE RIGHT TALENT**



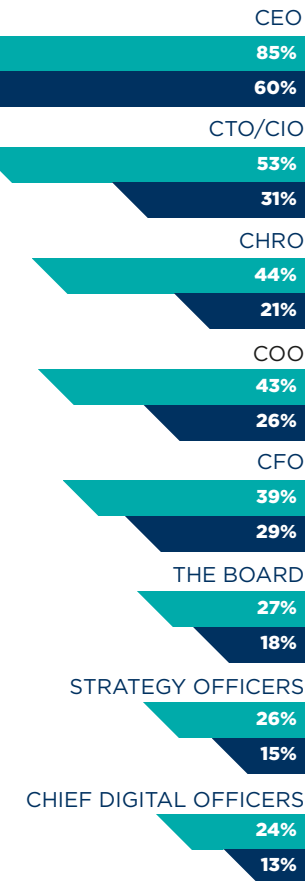
# A GLOBAL CRISIS

Levels of leadership confidence are similar across geographic regions. The Index found that North America has the highest percentage of worried leaders. 27% of them feel their organisations lack the ability to manage through disruption.



## MAJOR GAPS IN CONFIDENCE FOR THE CEO & EXECUTIVE LEADERSHIP TEAM\*

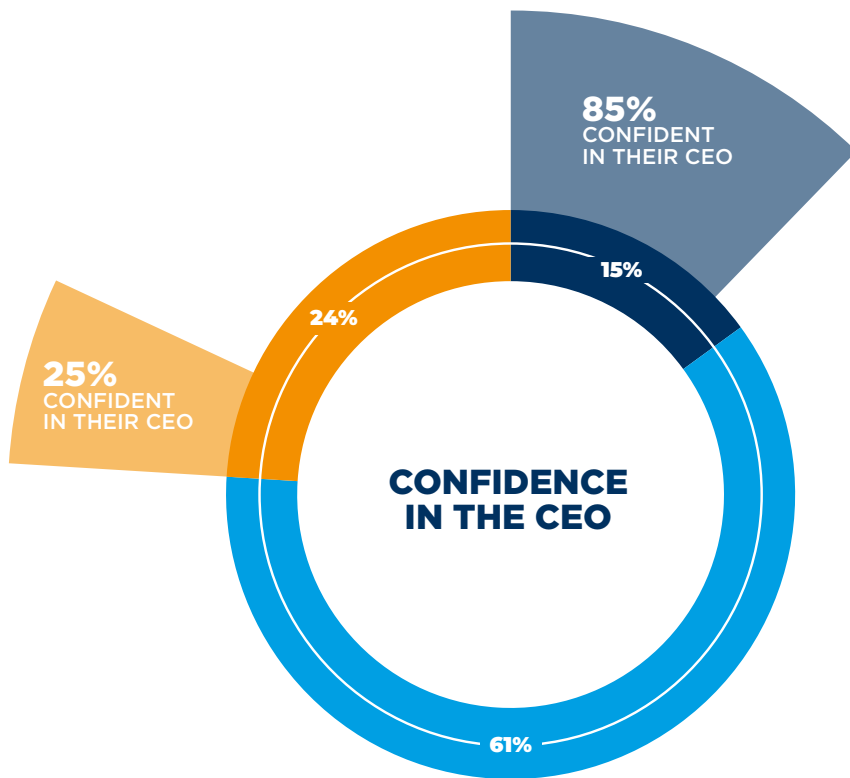
ROLE IN MANAGING DISRUPTION ●  
CONFIDENCE IN LEADERS OVER NEXT FIVE YEARS ●



This crisis of confidence appears most stark when we look at the confidence placed in individual leaders, namely the CEO and other executives. While 85% of respondents believe that the CEO has the most critical role to play, 40% express doubts that the person in the top role can deliver amid disruption in the next five years. This is a trend across all C-suite roles – including key jobs such as finance, human resources and technology. In fact, only 31% of executives admit to having high levels of confidence in their organisation’s CTO/CIOs, CHROs, CFOs and COOs. Yet they all have crucial roles to play in identifying commercial opportunities, preparing an engaged and adaptable workforce and turning innovations into action. In the companies where confidence is highest, dealing with disruption is already very much a leadership team issue.

\* Harvard Business Review Analytic Services, The State of Leadership: Is Disruption Creating a Crisis of Confidence? (2020)

# CONFIDENT VS WORRIED



Of the 15% of “confident” respondents, 85% say they are confident in their CEO to manage disruption. Comparatively, only 25% of “worried” respondents share their confidence.

## LEADERS & LAGGARDS EXIST ACROSS INDUSTRIES

While leadership confidence tends to be relatively high in sectors such as technology and consulting, there are leaders and laggards in every sector, with overall “average industry sector” confidence scoring between 48 to 60 on The Odgers Berndtson Confidence Index. By comparison, the 15% of organisations that express confidence in leading through disruption achieve a confidence score of 72 or above, regardless of their industry sector.



- CONFIDENT ORGANISATIONS
- TENTATIVE ORGANISATIONS
- WORRIED ORGANISATIONS

## ODGERS BERNDTSON CONFIDENCE INDEX SCORES





# ADAPT OR DIE

## IT'S TIME TO EMBRACE CHANGE

**The Odgers Berndtson Leadership Confidence Index finds that while all companies struggle to evolve day-to-day operations and infrastructure, the least confident organisations face twice as much resistance to change than more confident ones (31% versus 58%).**

More than half of respondents with low confidence report a lack of vision/buy-in (versus only 13% of those with confidence) and identify their leadership's vision and preparedness, or lack thereof, as being the greatest challenge to the organisation.

The uncomfortable truth for some CEOs is that a strong track record does not equate to having capabilities to deal with future disruption. But for the more progressive leaders in the top organisations – the winning 15% in our study – commercial opportunities

### ADAPT OR DIE

are abundant. These leaders have the mindset and vision to seize opportunities and are doing so. “In this study, people are saying, just because you’ve been successful and might be a good CEO today – or CFO, CIO or CHRO – it doesn’t mean that you have the skillset, mindset or the capabilities to help us confront future change and challenges,” says Eric Beaudan, Global Head and Partner in Odgers Berndtson’s Leadership Practice. The more progressive leaders see only opportunity. What is required is a healthy attitude towards change.

The Index results also reflect the recognition that the conventional five-year strategy plan is too restrictive and is becoming obsolete. Instead, a continuous evolution is required to keep pace with disruption. In more progressive organisations, leadership is much more focused on moving the strategy forward at an accelerated pace. This requires a mindset to adapt constantly, to drive growth, and to find the right balance of agility and resilience to stay on course.

A leadership style focused on continuous evolution of the strategy, requires wider engagement and input from both the extended leadership team and the broader organisational structure. “What we are finding is that the leaders who are successfully thriving now, are much more

collaborative with their colleagues,” says Mark Braithwaite, Odgers Berndtson Managing Partner, APAC and author of *Leadership Disrupted*. “They give their time to more open debate and see better outcomes as a result.” Organisations with more limited views are stifled in their ability to innovate. This is why the impetus for a leadership mindset focused on continuous evolution also implies abandoning the old management structures of “command and control”.

To model those who are driving success amidst disruption, leaders are learning to admit that they don’t have all the answers and be able to move on from past success. They are opening the way for their teams to innovate together, without fear of failure, as they create and implement new business models to take advantage of the pace of change, rather than become a victim of it. Braithwaite, who has conducted and published research on the mindset required for change in the context of disruption, believes that humility is a core quality for leadership in the future. “If leaders have the humility to accept that they don’t know everything,” he says, “they can create a culture of innovation that includes collaboration and diversity to think through business problems – a culture that celebrates trial and error.”



# CHALLENGES IN MANAGEMENT

We asked respondents to share their top challenges to managing disruption. The “confident” and “worried” share many of the same challenges. However, worried respondents are twice as likely to perceive resistance to change as a top challenge.

## TOP CHALLENGES TO MANAGING DISRUPTION WELL



- CONFIDENT ORGANISATIONS ●
- TENTATIVE ORGANISATIONS ●
- WORRIED ORGANISATIONS ●

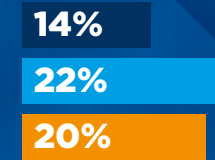
### LACK OF VISION/BUY-IN



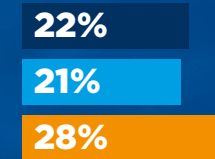
### RESISTANCE TO CHANGE



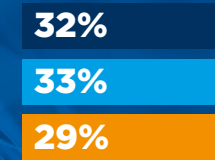
### INABILITY TO EXPERIMENT



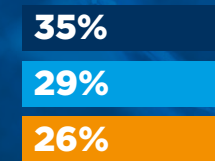
### LACK OF CLEAR PROCESSES



### SILOED DATA/INFORMATION



### LEGACY TECHNOLOGY



### DAY-TO-DAY DEMANDS



# PRIORITISE TALENT

**The Index shows that finding and keeping talent is one of the most daunting challenges for organisations of all sizes, regardless of their preparedness for disruption.** In our study, confidence is highest in leaders to drive the right values into the organisational culture, but lowest in acquiring and retaining the leadership talent needed to manage disruption successfully.

Though the specific concerns and priorities vary across the organisations covered in the study, some universal themes have emerged. When it comes to securing the best leadership talent, it is clear that the actions and outlook of the current leadership are pivotal when it comes to securing the best talent into the organisation. “Talent development is among the top priorities and responsibilities for the board and for senior executives,” says Eric Beaudan. “It’s not just an HR issue, it’s not just a CEO issue; it’s a business survival issue.” Our study finds that in the least confident organisations, leadership needs to play a greater role, if the organisation is to attract the talent it needs.



**Executives are least confident overall in leaders' abilities to prioritise talent**

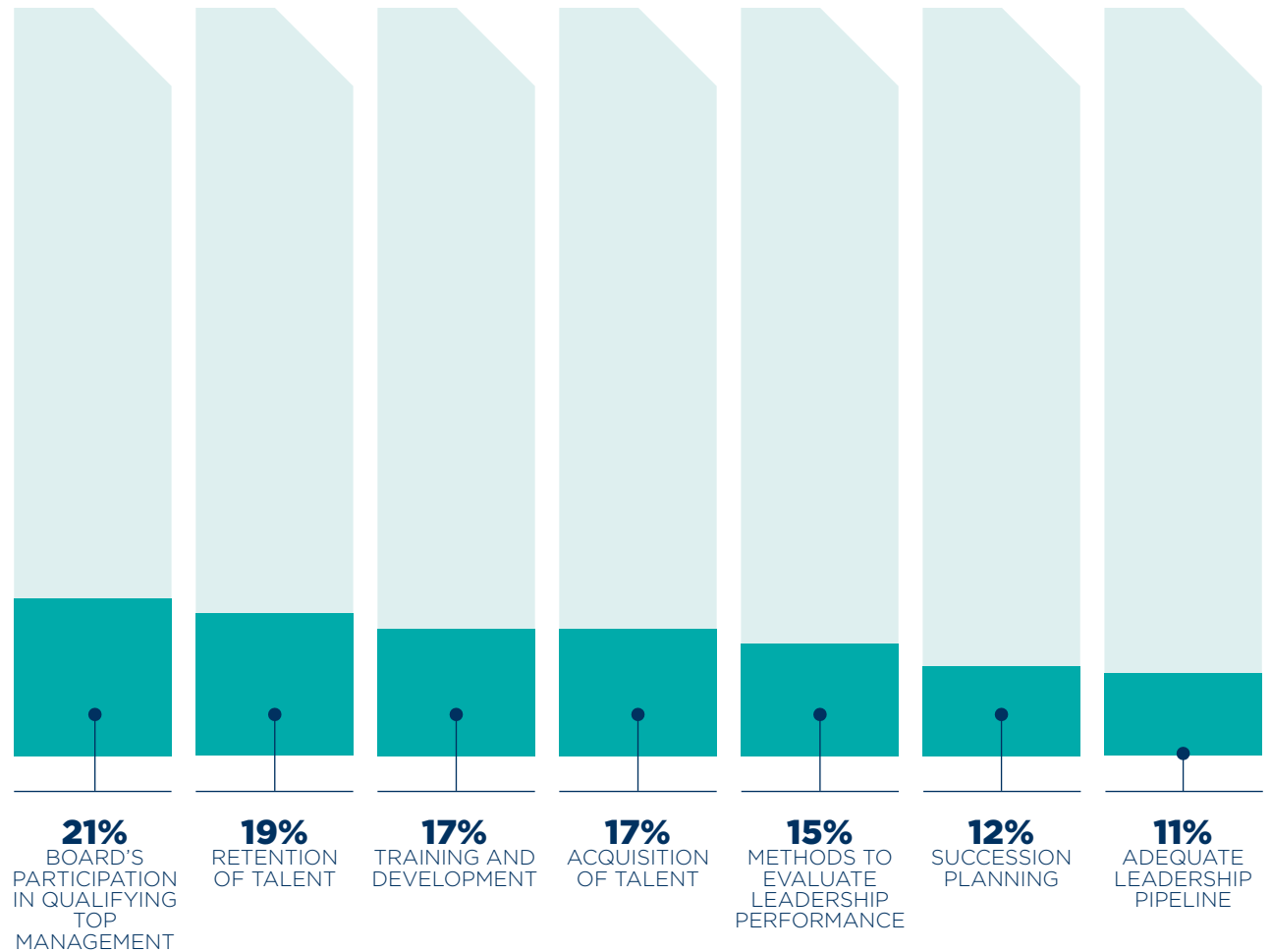


Organisations feel the burden of developing leaders and implementing effective processes for talent management.

The global executives in our study report challenges with leadership succession planning, measuring leadership skills, and in implementing programmes to develop leadership potential. Most are concerned about succession management and the pipeline of high potential leadership – both of which are vital to ensure sustainable success. Yet confidence levels in nearly all aspects of talent sits at an alarming level, below 21%.

To retain the best talent for the long term, organisations should have an actively managed and dynamic leadership succession plan, focused on identifying and nurturing high potential talent which has the ability to learn and adapt just as the organisation does. They should invest in the leadership development of high potential talent and better align incentives with the behaviours and skills that relate to value creation.

**THE MAJORITY OF LEADERS ARE NOT CONFIDENT THAT THEIR ORGANISATIONS ARE PROPERLY MANAGING THE TALENT AGENDA**





# ATTRACTING, DEVELOPING AND RETAINING LEADERS

**If organisations are to overcome the clear challenges they face when seeking and retaining the people they need to survive or thrive through disruption, then the incumbent leadership must play a greater role in the talent agenda.**

Leadership teams that are not clear about their strategy and vision for dealing with disruption will simply not be able to appeal to the best talent. High potential leadership increasingly seeks to align their contribution and input to organisations with a clear sense of purpose and those with a clear strategy to lead in their market.

The “worried” executives – those with the least confidence – cite issues with their own leadership as the main barriers to securing the talent required to succeed through disruption. They believe that sub-optimal leadership, a lack of strategy for tackling disruption and their leadership’s lack of preparedness for change, are among the greatest challenges when it comes to hiring and keeping the talent they need.

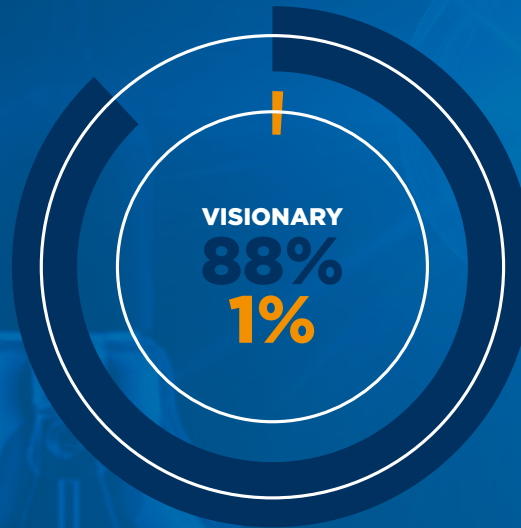
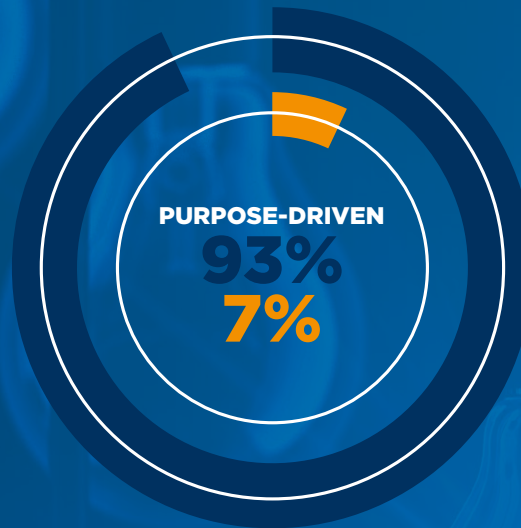
“Confident” respondents have very different battles to fight. For them, the top challenges to finding the talent they need lies not in the shortcomings of their leadership, but in the shrinking pool of available qualified talent. And when it comes to retention, the “confident” respondents say that they lack programmes to develop and nurture leadership in the organisation and that they lack sufficient incentives to motivate individuals to step up and take ownership for innovation and driving change.

It is common to hear CHROs and other leaders say that disruption is making the “war for talent” ever harder to win. Our study reminds us that this war can only be won by those fit to fight. Leadership’s readiness for disruption is a more fundamental concern.



CONFIDENT ORGANISATIONS ●  
 WORRIED ORGANISATIONS ●

**High-potential talent seeks a more personal and direct connection with their employers.** They expect a demonstration of the organisation’s purpose and a clear strategy to innovate and disrupt and want to contribute to it. To win the competition for talent, leaders need to offer an attractive sense of purpose, vision and culture in addition to pay, reward and career progression. These are all qualities long sought-after in leaders, but a strong sense of purpose has become more important in the mix to attract and retain the best talent. Without the above being visible and authentic, organisations will not be able to attract the talent they need.



While 44% of “worried” executives blame their sub-optimal leadership for failure to secure the right talent, only 9% of the “confident” executives see this as an issue. This is perhaps unsurprising given that “confident” executives say that their leadership is purpose driven (93%) and visionary (88%), contrasting greatly with “worried” respondents (7% and 1%). Nearly 20% of those worried about disruption say a lack of organisational purpose is a barrier to securing talent.



# REINVENT LEADERSHIP

## THE MINDSET AND TRAITS TO THRIVE IN THE FUTURE

**The results of our research are clear. If organisations hope to compete in a world of growing disruption, they need to focus on retaining and developing the type of leaders that thrive despite increasing uncertainty.**

For organisations to compete, they must look for ways to encourage and teach risk-taking. If success goes hand-in-hand with continuous innovation and adjustment of business models in the face of disruption, there also needs to be a tolerance of failure and openness to reinvention.

It's no surprise that qualities such as strategic thinking, resilience and adaptability score more highly in our study among

the most confident, compared to more conventional skills such as digital acumen, analytic skills and ability to operationalise transformation.

Today's leaders are being judged against a far wider range of values and mindsets, in addition to skillsets. The most successful leaders now score highly for their curiosity, courage and emotional intelligence - personality traits that typically mattered less a decade ago.

In the face of disruption, it is more important to understand mindset and assess the potential to thrive in new and different contexts.

### DRIVE / DETERMINATION

94%

19%

### COURAGE

90%

2%

### STRATEGIC AND CONTEXTUAL THINKING

88%

45%

### RESILIENCE

88%

1%

### CURIOSITY

84%

4%

### ABILITY TO ADAPT

80%

1%

### EMOTIONAL INTELLIGENCE

79%

2%

### DECISIVE AT PACE

74%

4%

### ANALYTIC SKILLS

73%

5%

### ABILITY TO OPERATIONALISE TRANSFORMATION

65%

1%

### DIGITAL ACUMEN

59%

2%

There is a huge gap in confidence between respondents from "confident" as opposed to "worried" companies in regard to demonstration of the characteristics needed to thrive in a world of complexity and uncertainty.



# SEEK OUT LEADERS RUNNING TOWARD DISRUPTION

**For those organisations that are not confident about their ability to thrive in the face of disruption, they just need to look at those who are confident, to see what is missing.**

They need to hire and develop leadership with the potential to deliver value today and tomorrow, and the growth potential and adaptability required to sustain that value creation as disruption continues to shift the business context.

“It’s critical to hire people who think and innovate differently. The type of people who are running towards disruption,” says Steve Potter, CEO of Odgers Berndtson US. “Organisations need leaders who aren’t worrying about failure, but who are focused on opportunity and who will create structural changes that might be uncomfortable to old backward-looking CEOs and backward-looking COOs. If you hire people who look and act like those who got you to the top you will fail. The work must begin at the board level and work downwards, injecting new ways of thinking into the organisation.”

To that end, leadership development must be based not simply on skills or past performance, but on potential and mindset to adapt and grow for the future. In this era of continually accelerating disruption, organisations should look for potential for self-growth, the ability to analyse and synthesise complex information, and the ability to drive and execute the strategy to completion. At the same time, leaders must remain resilient to challenge and adaptable to changes in context, and have the ability to relate to, and communicate with those they lead in the pursuit of strategic goals.

Our LeaderFit™ model seeks out high potential. As well as assessing typical leadership skills and performance, we look for potential in four key areas:



# MAKING CHANGES FOR THE FUTURE

**We hope that this study has helped you think about your own organisation, leadership team and perhaps even your own style of leadership.**

The Odgers Berndtson Leadership Confidence Index is certainly influencing the way we engage with our clients, as well as with the leadership talent we assess and help appoint.

It has provided a clear vision of where leadership works, and where it's falling down. But more than anything, the Index provides a way forward we can all feel confident about.

# INITIATING CHANGE

**As an executive search firm, stating that there is a crisis of confidence in the leadership of most organisations, would have no real value without offering a way forward.**

This data-rich study identifies how, and why, some leaders are thriving while the rest are seemingly paralysed in the face of disruption to their businesses. With that understanding, it is possible to see what organisations should do.

Of course, disruption is not new. There has always been change and organisations continually evolve as their leaders make critical decisions to align with emerging customer and competitive changes.

What is different today, is that the pace of change has accelerated to the point where the pace itself is the main disruptive challenge. There is no resting place.

What's more, this is not a phase, nor is it a sudden new reality.

The pace of change has accelerated over many years to the point where it seems we are on a runaway roller coaster without the ability to know which way is up.

Leadership is therefore being forced to operate in different ways, or face extinction, for themselves, and potentially the organisations they lead.

So, with only 15% of executives feeling confident about the leadership in their organisations today, clearly we face a real crisis. The executives who responded to the survey were not only critical of their colleagues, but also of themselves.

The value in this report lies in the stark difference between the “confident” and the “worried”. The data allows us to see clearly what is important to succeed. This offers an accessible and workable starting point to initiate change.

**“Adapt or die”** is a recognition that leaders must look past any legacy of success and accept that the future requires a concerted effort and openness to continuous change. This can only be driven by the leadership team. Understandably, it is hard to let go of the model of repeating the formula that led to past success. But this is required if companies are to face disruption confidently.

**Prioritise talent** has always been spoken about by leaders, but now it's critical to go beyond the “speak about it” stage. A structured, direct and committed engagement at all levels is no longer an option, but the minimum requirement. Leaders need to go beyond pay and incentive and attract and retain the best talent by demonstrating their vision for the organisation, the purpose it fulfils and the strategy which leads the organisation to that point.

**Organisations should reinvent their definition of good leadership.** As every organisation is forced to evolve at a faster and faster pace, the demands on every employee will change and they all need to be able to adapt or they'll just slow everyone else down. This all starts with the leadership team. Their starting point must be to first admit they don't have all the answers and then engage the collective intelligence within the organisation. This takes a new level of humility and a different way of leading. Leaders require the potential for learning and self-growth, they must combine their drive with resilience but also adaptability.





# OUR SUPPORT

## EXECUTIVE AND BOARD SEARCH

**Securing the right leadership is essential to ensure that an organisation keeps pace with disruption.** Odgers Berndtson helps organisations identify, attract and develop extraordinary executives who can ensure that evolution happens.

We combine deep sectoral insight with an analysis of the specific context in which the organisation is operating. This entails evaluating existing board and management dynamics to ensure we consider every brief from all perspectives. We use our understanding to support clients to secure innovative leadership and board appointments capable of leading their businesses through disruptive times and towards success.

With offices in 29 countries, and through global collaboration between them, our consultants combine their industry and functional expertise with cultural and geographic knowledge to ensure clients have a strong and diverse selection of candidates to choose from.

We guide organisations towards appointments that will transform their business and secure its future. And we stay with our clients, and those we place, beyond each successful search, to support their continued joint future success.

“Securing the right leadership is essential to ensure that an organisation keeps pace with disruption”





# INTERIM APPOINTMENTS

**An interim appointment can fill critical skill gaps and set a new vision at a time of disruption, transformation and growth.**

Organisations must ensure that they have access to the full complement of talent they need to sustain and grow their business. This is most critical during periods of unprecedented change, and when confidence in existing leadership to deliver may be in question.

Whether driving change, leading vital programmes, or temporarily filling a key management position, effective interim management can embed best practice and leave a legacy of improvement and continued sustainable growth.

Odgers Interim provides clients with access to a large pool of skilled interim executives, senior managers, as well as independent consultants through its international network.

## LEADERSHIP ASSESSMENT AND DEVELOPMENT SOLUTIONS

**We are evolving quickly with our clients to help them define and measure the ability of their leadership to be successful in the future, so they know where to develop and where to replace leaders.** To help in this process, our LeaderFit™ Model and Profile is designed to identify the leaders able to thrive in a world of disruption, complexity and uncertainty. We combine this with our deep knowledge gained from the market through our global executive search consulting. Our leadership solutions include:

### **Executive Assessment**

Select the best candidate, whilst mitigating risks and setting up the appointee for success.

### **Leadership Capability Review**

Assess leader's capability and potential against current and future requirements.

### **Team Performance Optimisation**

Maximise the team's performance and equip leaders to sustain success.

### **Active Succession Management**

Secure sustainable success through robust, externally validated succession plans for CEO and C-Suite.

### **Leadership Coaching & Development**

Help executives lay a solid foundation for success and avoid common pitfalls.

# METHODOLOGY

**The Odgers Berndtson Leadership Confidence Index is believed to be the first measure of confidence in global business leaders and their ability to manage through disruption and drive success.**

The methodology has been developed by Odgers Berndtson with Harvard Business Review Analytic Services. The analysis is based on responses to a study of 1,890 senior executives, representing companies with revenues ranging from \$50 million to over \$5 billion.

For this study, we defined disruption as the unsettling forces that can impact an organisation's strategic direction and challenge its operational capabilities, such as emerging technology, competition from unexpected quarters, the impact of climate change, regulatory oversight, innovative business models, rising customer expectations, and shifting demographics.

The Index provides a single measure of confidence in leadership's ability to succeed through disruption by combining the responses to questions examining attributes and activities of leadership. The Index also measures confidence in leadership skills, experiences, motivations and behaviours. Companies with high and low confidence scores are compared to highlight those leadership activities and attributes that are found to a much greater degree in organisations that feel positive about future success.

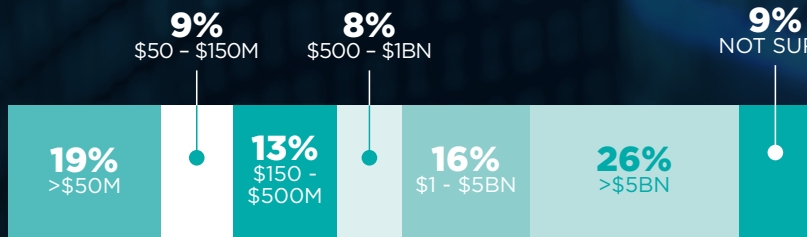
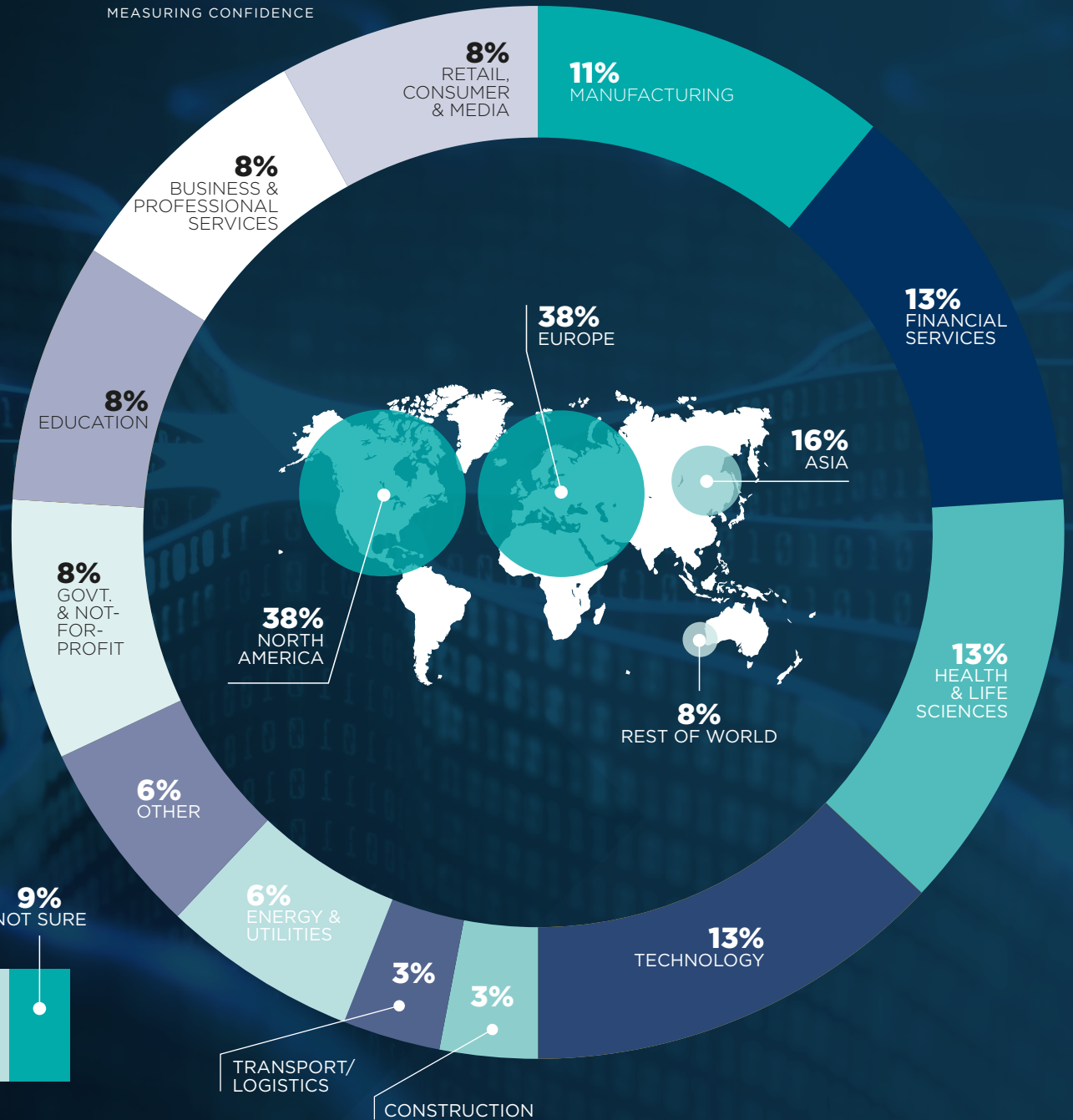


“The Index provides a single measure of confidence in leadership’s ability to succeed through disruption by combining the responses to questions examining attributes and activities of leadership”

# STUDY STATISTICS

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MEASURING CONFIDENCE



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