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EXECUNET REPORT

2012

Executive Job Market Intelligence Report





Executive Hiring and Job Market Prepared to Advance in 2012

Business And Career Clarity Comes Into 20/20 Focus

The year that was 2011 was filled with hope for a broad economic recovery that would put businesses and careers on a firming footing, particularly as companies and executive leaders moved during an unprecedented economic environment from survival mode to a focus on slow, albeit uncertain growth.

Looking back, 2011 might best be remembered as a year of uncertainty punctuated by economic “bookends” from employers’ perspectives (given how the year started and ended with such optimism only to be stymied by a highly uncertain spring, summer and fall), and of deferred career plans for many executives. For both, it amounted to a waiting game and a search for confidence that in many cases simply failed to materialize until a particularly bright last few months of the year.

“If employers and executives have learned anything over the tumultuous past five years, it is that economic currents, global market dynamics, disruptive business models and new competitors can redraw strategic positioning overnight,” says ExecuNet’s President and Chief Economist Mark M. Anderson. “In this climate, executive performance may hinge more than ever

on one’s capacity to adapt rapidly to a new operating environment,” he adds.

Increasingly, globalization and the rapid pace of change is transforming industries and rewriting the skills required of leaders to address challenges and capitalize on opportunities. These pressures have put a premium not only on corporate continuity planning, but have also made executives’ considerations of career sustainability a clear and ongoing mandate.

As executives and employers closed the books on 2011 and entered 2012, they did so indicating they are more concentrated on growth, renewal and thoughtful investment to seize on increasing market opportunities even in the slow growth environment that many U.S. employers find themselves facing domestically.

As ExecuNet surveyed executive viewpoints from all angles in preparing to share this 20th anniversary *Executive Job Market Intelligence Report*, it became clear that executives and their employers are seeing the world, the markets they serve and their respective futures with more clarity than at any time since the emergence of the global economic crisis.

Companies are indeed looking to grow, as ExecuNet research reveals that more than a quarter of employers are now adding new management positions and more than half of employers are selectively “trading up” with new hires for existing executive roles to fill gaps or improve teams. Of course, the pace of hiring activity is not equal across all industries, but it is especially strong across many sectors. Equally promising news comes in the revelation that only 2 percent of companies are continuing the management cutbacks that many executed beginning in 2008 and through much of the downturn.

“The search is already on for sales, business development, sales enablement and marketing leaders who can grow the corporate top line,” observes ExecuNet Founder and Chief Executive Officer Dave Opton. “Companies are also seeking to add more general managers with the capacity to lead by example, make sound business decisions and inspire their teams to improve performance,” Opton shares.

Employers are also focusing more on executive retention, an increasing recognition of the escalating competition for executive talent and the significant cost of losing elite performers. This

“You can see real synergy in the networking investment by executive recruiters and senior management leaders to find one another,” says ExecuNet Founder and CEO Dave Opton. “In 2012, we expect that employers will continue to invest more resources in business networking to achieve strategic staffing and other human capital priorities in real time, on budget and in line with corporate objectives.”





renewed focus on talent and retention suggests that opportunity is already knocking for well-networked executives across all industries and functions, including for those who aren't currently considering a career move.

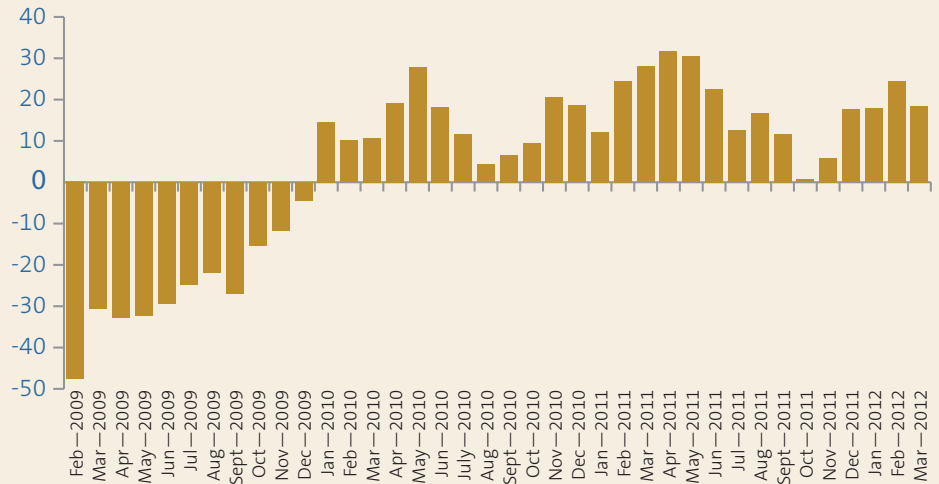
Whether engaged in job search or comfortably positioned with no immediate interest in career transition, executives continue their move online and are making themselves more visible – be it to connect with peers who can help them understand what's going on in their marketplace, or to be found by recruiters. Executives are “going social” in growing numbers, seeking answers to business and career challenges alike.

Networking has long been a critical candidate sourcing activity for executive recruiters, and that continues to be the case. After a challenging four years, executive recruiters are poised for double-digit growth in 2012, and some have already indicated that their task is being made more difficult because employers are increasing salaries, bonuses and counter-offers to keep top-performing talent.

From the individual executive perspective, however, cash is no longer king. While it still constitutes the foundation of a prospective employers' compensation offers, more business leaders are taking work/life balance, advancement potential, the overall attractiveness of an employer's brand and industry space, and the likeability of a prospective new boss and team into more serious consideration than ever before. Although many executives feel compensation hasn't kept pace in recent years, many have also recognized that money isn't their sole motivation when it comes to growing their careers.

Employers and executives find consensus in the view that 2012 will bring more

Executive Job Creation Growth (2009-2012)



- ExecuNet's exclusive Executive Job Creation Index reveals an improving environment for executive hiring – be it to fill new management roles or to selective upgrade talent by hiring new leaders for existing leadership roles.
- ExecuNet's latest barometer on executive job creation reveals executive recruiters anticipate 51 percent of employers will leverage this economic climate by “trading up” with new hires for existing executive jobs, and 27 percent will add new executive-level roles over the next six months. Only 2 percent of employers are expected to eliminate executive positions, with the balance of employers expected to forego filling currently vacant roles or choosing not to add new jobs.
- “With more than 75 percent of companies expected to engage in executive hiring activity to fill new jobs or replace underperforming leaders and only 2 percent expected to cut management jobs, we believe there's reason for optimism that the executive employment market is beginning to open up once again,” says Anderson.
- “The frustration many employers felt over the past four years is giving way now to a real concerted push for growth. That's good news for shareholders and especially welcome news for executives who have been waiting for more meaningful career opportunities to come their way,” Anderson observes.
- Joining executive job creation in a positive trend is “confidence among executive recruiters,” 59 percent of whom are “confident” or “very confident” the executive employment market will improve over the next six months. Further, executive recruiters expect to realize a 19 percent jump in new search assignments through the first quarter of 2013.

opportunities for growth and open up new paths to achieve it. Because executives' own “inner circles” are not keeping up with the pace of change nor consistently diversifying points of view, more leaders will achieve this growth through “peer sourcing” – which

Anderson defined as “a new approach to networking their way to new ideas, new business and career opportunities.” ■



Prospects for Growth are Growing More Solid in 2012

Recruiter Confidence Rebounds Amid Forecast of Strong Growth in Executive Job Market

While mixed signals on the broader economy punctuated a business agenda beset with uncertainty and a focus on risk management, business executives engaged in a waiting game for most of 2011. Many spent the year keeping vigil for signs of business growth and increased consumer confidence while biding their time in anticipation of new career opportunities that in most cases simply failed to materialize.

The combination of stubborn lack of growth prospects, a lack of consumer confidence, record home foreclosures revealing no turn in the real estate market, Washington's political failure to cut budget deficits and the national debt, the downgrade of U.S. credit by ratings agency Standard & Poor's, and the

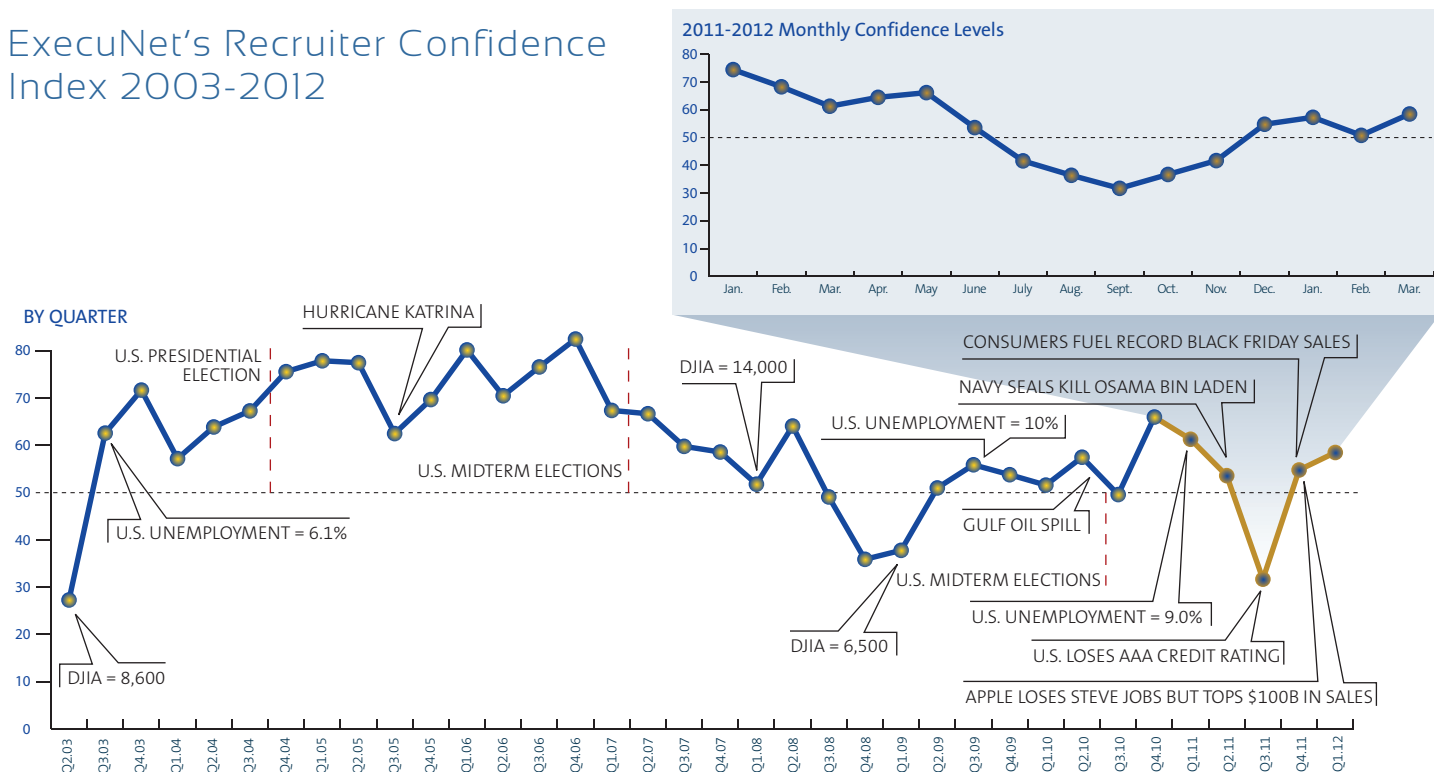
European sovereign debt crisis weighing heavily on executive recruiter confidence through the third quarter of 2011. For many, these factors made 2011 a rather disappointing year. But 2012 is already shaping up to be a much different story. Consumer confidence has risen to its highest levels since 2008, and consumer spending has built on a strong final few months of 2011 to stretch and grow in 2012, providing a positive tone for the broader economy as the stock markets rise to near pre-recession levels.

While uncertainty still lingers, it is no longer dominating discussions of organizational and professional growth in 2012. High energy prices could constrain growth and inhibit consumer spending this year, however, most businesses are impatient

for growth and investing in opportunities. This renewed sense of corporate intent to grow has led to a sustained recovery in confidence among executive recruiters, who will help lead the search for executive leadership as employers invest to target new markets and seek to upgrade the capabilities of their senior management teams.

"ExecuNet's exclusive Recruiter Confidence Index has proven to be a leading economic indicator during upturns and downturns and reflects the relative optimism executive recruiters have in the future growth of the executive employment market," says Anderson. The index reading above 50% for the last several months should give executives a sense of confidence. ■

ExecuNet's Recruiter Confidence Index 2003-2012





Companies and Executives Poised For a Much Anticipated Year of Change

While much of 2011 forced a lot of fits and starts for companies and executive careers, growth activity in some pockets of the broader economy continued to drive executive transitions and a corporate concentration of effective talent management.

Some industries that remained particularly resilient during the trying times of the recession and the first three quarters of last year continue to promise significant business growth and executive career growth opportunities in 2012. Despite the sluggishness in some sectors, pockets of strength still reside in others, opening up new career opportunities and proving grounds for executive in-role performance as the global economy continues to take steps toward a more comprehensive and sustained recovery.

The growth story continues in industries such as healthcare and high technology, which again top those expected to generate the greatest growth in executive hiring. Manufacturing continues its steady climb near the top, reflecting a serious talent deficit triggered by the great global recession and the need for these companies to reinvest in human capital and management leadership in particular.

The consumer products industry, buoyed by stronger consumer confidence, is also on the rise, as is business services. The apparent decline in projected executive hiring in the clean/green technology industry may be more accurately accounted across multiple other industries as it integrates into more employers' operations.

Hiring Shift Continues: Top Industries Recruiters Say Will Lead Executive Job Growth

| 2010 | 2011 | 2012 |
|---------------------------------------------|---------------------------------------------|---------------------------------------------|
| 1. Healthcare | 1. Healthcare | 1. Healthcare |
| 2. Clean/Green Technology | 2. High Technology | 2. High Technology |
| 3. High Technology | 3. Clean/Green Technology | 3. Manufacturing |
| 4. Life Sciences (Pharma./ Medical/Biotech) | 4. Life Sciences (Pharma./ Medical/Biotech) | 4. Business Services |
| 5. Energy/Utilities | 5. Manufacturing | 5. Energy/Utilities |
| 6. Business Services | 6. Financial Services/ Banking/Insurance | 6. Life Sciences (Pharma./ Medical/Biotech) |
| 7. Financial Services | 7. Energy/Utilities | 7. Consumer Products |
| 8. Government/Nonprofit/ Education | 8. Business Services | 8. Internet/Online Services |
| 9. Environmental Products/ Services | 9. Internet/Online Services | 9. Clean/Green Technology |
| 10. Manufacturing | 10. Consumer Products | 10. Financial Services |

Top Growth Regions for Executive Hiring, According to Executive Search Firms



“Rapid changes are becoming a normal state of affairs for executives in every industry,” says ExecuNet Editor-in-Chief Robyn Greenspan, an expert on social media strategy. “Executives are being challenged like never before. Additionally, how they conduct their own career management has been pushed to evolve at the same pace, particularly when it comes to assessing the value and sustainability of their industry, employer and new opportunities,” Greenspan adds.

Market strength in any one of these talent-focused industries may be enough to compel proven business leaders to assume the risk of transition into a new sector, a new employer and a new career track. Executives are tired of waiting for the economic climate to improve. Many already see growth on the horizon if not already afoot, and they’re actively creating and sorting their options. ■



The Intersection of Business Needs and Executive Talent

The great global recession had one universal impact on companies of all sizes, across all industry sectors – it forced them to focus internally to find the operating efficiencies required to survive the tumult on the outside.

It also had a big impact on corporate executives across a broad swathe of functions, forcing them to recommit to operational excellence, structural efficiency and risk management. This inward focus moved many business leaders to abandon normal career advancement and transition as a viable option because of either a dearth of new management opportunities (depending on the industry space) or a general lack of consistent intelligence about the propriety and best timing of a critical career move.

Yet, as proven business leaders look to business challenges and enterprise opportunities for 2012, they are beginning to see the signs of career opportunity more clearly. With corporate focus now on top-line growth, from a functional perspective, companies of all sizes will rely most on sales and business development leaders, as well as those with a broad view of organizational, cultural and end-customer engagement best practices.

As businesses seek to grow market share and connect with new consumers, their external focus will also drive more investment in marketing. Additionally, as they connect more meaningfully with customers, vendors, market influencers and media in 2012, they will invariably learn what it takes to satisfy discerning consumers and invest more heavily and more consistently in innovation.

“Creating the right products and services to earn consumer loyalty will also

Executive Management Functions Companies Expect They Will Most Need to Add in 2012

1. Sales and Sales Enablement
2. General management/leadership
3. Marketing (including “Go-to-Market” Strategy Development and Market Research) (tie) Technology and Information Management
4. Financial Management
5. Innovation

Most Sought-After and Hardest to Find Executive Characteristics, According to Executive Recruiters

| MOST SOUGHT-AFTER BY EMPLOYERS | HARDEST TO FIND FOR EXECUTIVE RECRUITERS |
|--------------------------------------------------|--------------------------------------------------|
| 1. Ability to build, lead high-performance teams | 1. Industry-specific experience |
| 2. Industry-specific experience | 2. Strategy and execution leadership |
| 3. Strategy and execution leadership | 3. Ability to build, lead high-performance teams |
| 4. Functional/Technical experience | 4. Functional/Technical experience |
| 5. Problem-solver | 5. Record of innovation |
| 6. Change agent | 6. Change agent |
| 7. Cross-functional expertise | 7. Turnaround experience |

hinge on corporate strategy plans and leaders’ capacity to create and inspire high-performing teams,” says ExecuNet Senior Contributing Editor Joseph Daniel McCool, an author and expert on management succession. “Particularly in hyper-competitive consumer markets, the companies with the best executives and the best management teams will achieve a significant market advantage over their rivals,” McCool adds.

Now is the time for sales, sales support and marketing leaders to shine; for innovators to innovate; for those who understand the critical linkages between human capital and sustainable returns to investors to reconnect with the patchwork of customers whose

loyalties and buying habits drive business growth.

The next step for transitioning executives is clear: Demonstrate how your unique experience, expertise and capacity to lead others adds up to a compelling opportunity for business growth and renewal.

Characteristically, industry and functional experience and demonstrated leadership skills were the top three most sought-after executive skill sets. Now, seeing a shift that has implications for executives, employers are demanding new executive recruits bring an ability to lead high-performing teams and strategy and execution leadership has become even more critical than functional skills. ■



Executives and Companies Invest in Broader Peer Networks to Achieve Key Goals

Seasoned business executives have long known that one of the best ways to get ahead is to network with the right people to accelerate their learning curve on complex business issues and to accelerate their careers.

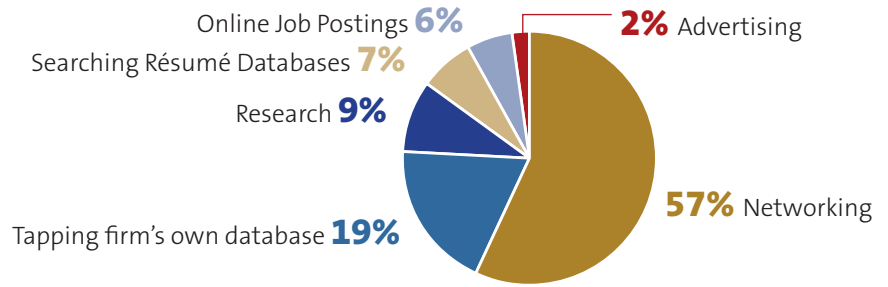
“Today, more executives are increasingly going online to connect,” says Greenspan. Driven by the need to connect with accomplished peers and to learn quickly, they are engaging in more networking with purpose – online and face-to-face – than at any previous time in their professional careers to create business opportunities, to gain answers and solutions from peers and, in the process, multiply career options for themselves.

But purposefully networking isn’t only a medium for executive career advancement. Executive recruiters and corporate employers are likewise investing more time, energy and capital to turn business networking into a highly efficient source of superior management talent for recruiting and upgrading their management bench strength.

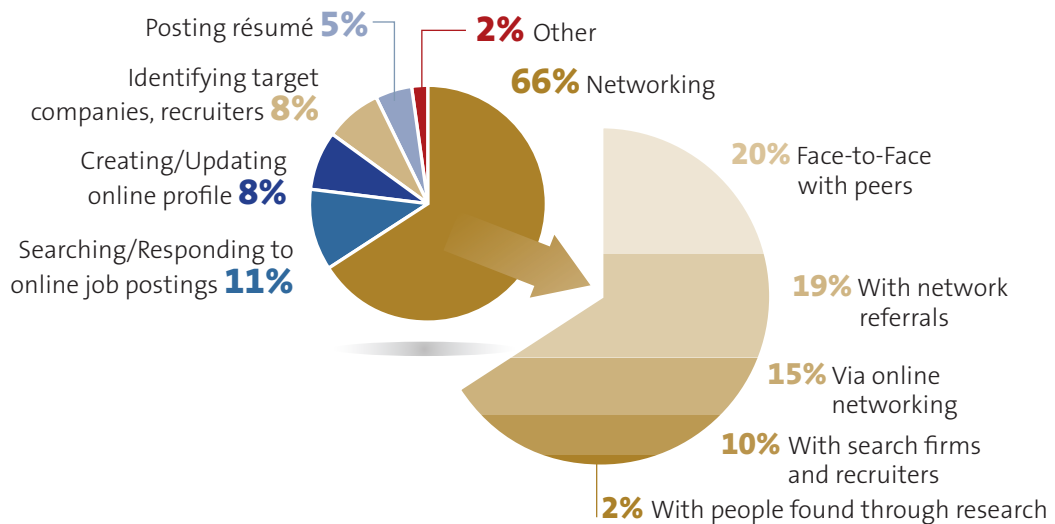
“Consistent and effective business networking remains the catalyst for executive career advancement,” says Opton. “Yet we’re also witnessing the continued emergence of professional networking as a tool for business intelligence, brand-building, resource planning and global expansion.”

“Not only are executives going online increasingly to connect with one another,” says Greenspan, “it’s mission critical to create digital career identity strategies that enhance their visibility and enable them to be found by peers and recruiters to explore new opportunities.” ■

How Recruiters Find Executive Candidates



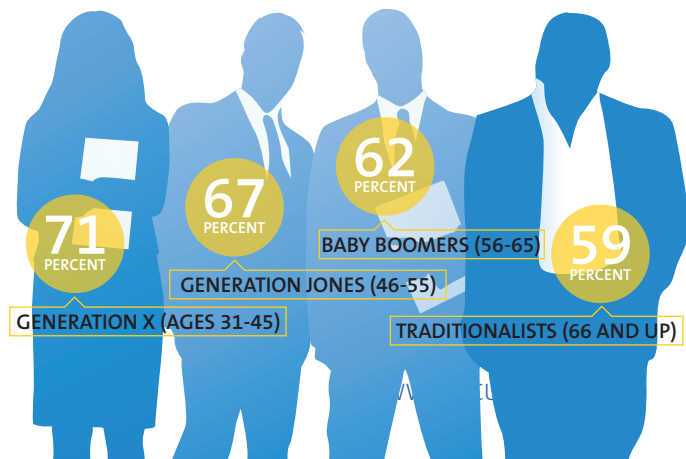
How Executives Create/Find New Career Options



Percentage of executives who have actively worked to become more visible online

The Shift Toward Executive Profile Visibility

Business executives of all ages are making their online profiles more visible to support their professional networking activities and objectives, and it’s not just the digitally native Millennials, as the following chart reveals...





Cash Is Key, But Other Benefits Coming Into View

While total compensation still ranks as the primary reason seasoned executives turn down an employer's employment offer, and cash (mostly in the form of annual salary and bonus) remains a key consideration for any executive making a big career move, pay is no longer the be-all and end-all when it comes to assessing the most valuable career opportunity.

For starters, more executives are evaluating long-term measures of potential wealth-building than just short-term metrics, adopting much the same view many organizations have been forced to adopt in recent years, either as a result of economic conditions, and regulatory or shareholder pressures, or all of the above.

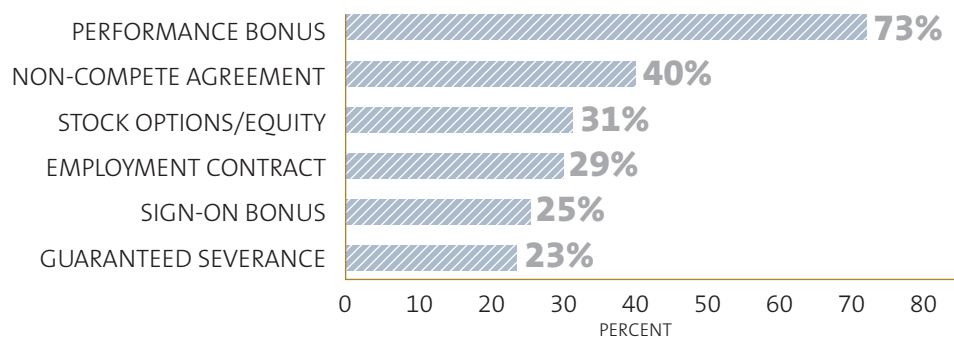
That means they're looking closely at compensation but also making highly consequential judgments above their advancement potential within a new enterprise, the quality of the team they'll inherit there and its capacity to drive improved financial performance, and whether a new boss will give them room to run and the recognition that should come with a smooth transition and great business results.

Also, consider that executive performance bonuses are based nearly twice as much on organizational outcomes as on personal output, with team/unit performance and other elements also factoring in to the size of business leaders' annual bonuses.

The good news for executives is that compensation is again on the rise. In 2011, executives reported an average 2 percent gain in total compensation, which was much better than the 4 percent loss recorded in 2010 and the 12 percent slide they felt in 2009 amid some of the darkest days of the global economic recession.

What's in Executive Employment Packages?

Percentages of executive pay packages that executive recruiters say now include the following elements:



Most Important Elements of Executive Compensation Packages (Other Than Base Salary) as Ranked By:

| | EXECUTIVES | SEARCH FIRMS |
|---------------------------------|------------|--------------|
| Annual performance bonus | 1 | 1 |
| Stock options/equity | 2 | 2 |
| Healthcare contribution | 3 | 6 |
| Profit sharing | 4 | 5 |
| Long-term performance bonus | 5 | 4 |
| Perks | 6 | 7 |
| Professional development budget | 7 | 11 |
| Employment contract | 8 | 9 |
| Commission structure | 9 | 8 |
| Severance terms | 10 (tie) | 10 |
| Relocation package | 10 | 3 |

Compensation remains one yardstick by which management candidates, employers and executive recruiters measure the gravity and intensity of a key leadership role. Consider how it plays from these angles:

- Sixty-three percent of executive recruiters say that compensation is no longer the predominant influence on executive career transition.
- On average, executives expect a 14 percent compensation premium when transitioning from one employer to another.
- There is a disconnect between what

executives say is important and what search firms observe about the elements of executive compensation. Executives rank healthcare contribution among their three highest considerations in a pay package, yet it doesn't even rank in the top five registered by executive recruiters. Further, professional development budget was ranked higher by executives than by executive recruiters, suggesting that executives may be looking at new career opportunities with a longer-term lens than the recruiters. ■



Companies Expected to Focus More on Executive Retention

With every new day putting them at a safer distance away from financial upheaval and the fog of economic uncertainty, companies and executives are increasingly mindful of the opportunities that continue to surface in what seems a less volatile operating environment.

For employers, business growth tops the agenda. For executives, career advancement ranks high on their list of priorities for 2012, should it take the form of a transition to a new employer or perhaps even to a new industry space, or even a redefined role within their current organization.

With growth and the potential for change looming large, employers are becoming increasingly aware of the flight risks among their executive management teams, amid their high-performance talent pools, and within the ranks of the so-called “high potential.”

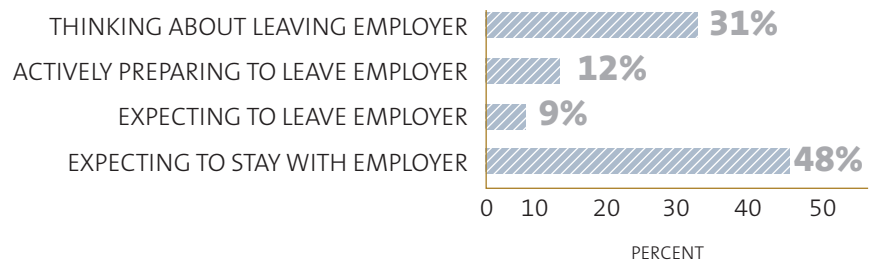
Nearly eight in 10 employers will work harder to retain top executive talent in 2012, the third consecutive escalation of what has become an annual human capital priority. Judging from the willingness and preparedness of executives to consider their career options, it seems a smart move by companies. For some companies, however, this focus on executive retention may come too late.

Executive recruiters also confirm that corporate efforts to retain top management talent are making their jobs more difficult. ■



Percentage of employers expected to work harder to retain top executive talent in 2012

Executive Attitudes about Their Current Job and the Next 12 Months



Percentage of executives who have updated their résumé in the past three months

Top Triggers That Would Move Employed Executives to Look for a New Role in 2012

1. Receiving viable calls from executive recruiters
2. Conflicts with current boss/management
3. My employer’s overall poor performance
4. Hearing about others finding success and landing new executive roles
5. Improved business prospects/career options within my employer’s industry



Percentage of executive recruiters who say companies are increasing salaries, bonuses and counteroffers to retain executive talent



Executives and Companies Creating Their Own Opportunities

Senior management executives and employers have turned the page.

With hard lessons and new insights in hand, they're focused with a renewed sense of optimism on their careers, their businesses and the potential rewards associated with taking new products, services and innovations to an ever more global marketplace.

Executives who have built incredible personal and professional networks are tapping those unique ecosystems to improve their access to decision-makers and inform their own decisions about business and career.

Companies continue to build internal networks to make global organizations

Top Activities That are Helping Executives Advance Their Careers

1. Routinely building network outside company/increasing visibility and participation with industry groups
2. Continuing to expand functional/technical skills and expertise
3. Working "all out" to do my best in current role
4. Actively developing leadership skills
5. Developing and building awareness of my "personal brand"

more intimate, more aligned with customers and more effective, with suppliers, alumni and market influencers all contributing their voices.

The future of business and executive careers is grounded in relationship building, and the genesis for

transformational linkages remains one's own network of peers, friends, former colleagues, industry insiders and referrals from those trusted sources.

For many, what they take from those networks and relationships is only as good as what they put into them. ■

Peer Point-of-View: What Executives Say Will Get Them to the Next Level



"Continue to focus on refining my leadership and communication skills to optimize overall effectiveness."

"Determine where I want to go next and what industry/field holds my interest. Determine what factors matter most to me in my next position and then begin marketing myself to companies that meet those criteria."



"Improve my visibility, both online and through networking and résumé development."

"Think smarter. Work smarter. Have better discernment. Learn how to grow my team to a higher level of excellence quicker."





"Within the company, help CEO recognize the impact of the cultural and performance changes made in my business unit and the impact they would have on a broader scale. If outside current company, improve networking activities and skills."

"Be open to opportunities that may not at first appear to be so. Recognize trends of change in the healthcare industry and be ahead of their implementation by being the 'smartest guy in the room' to effect revenue enhancing policies and procedures."



"Develop and build awareness of my 'personal brand.' I do not do this as well as I should."

"Become more computer-savvy and more skills in all types of social media."



"Willingness to change."

"Pick a path and stay committed. Do what it takes."



"Bring idea to life cross-functionally."

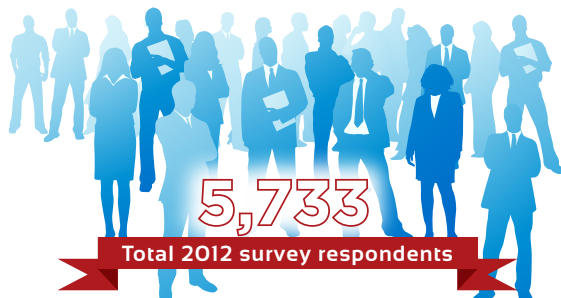
"Enhance skills in global leadership."



About The Report

ExecuNet's 20th annual market intelligence briefing, *2012 Executive Job Market Intelligence Report*, is based on simultaneous surveys of ExecuNet's executive members and the executive search firms and corporate recruiters who regularly engage ExecuNet's candidate sourcing services. In addition, we invited participation from the executive, search firm and corporate human resource communities of strategic partner organizations: Forbes; CMO.com; WOBI, a powerhouse of actionable ideas from people shaping the business world; and Dillistone Systems, publishers of *search-consult*. The surveys, which we have conducted annually for the past 20 years, seek to determine trends and best practices in executive-level career development and candidate search, hiring and retention. For the purpose of this research, executive-level denotes those professionals at the Director/Vice President/C-level and above with annual total compensation (salary plus bonus) of \$150,000 or greater.

- A total of 5,733 participants were surveyed in January 2012: 4,282 executives from North America and an additional 874 executives from outside North America; 539 search firm consultants and corporate human resource and talent acquisition leaders; and 194 search firm consultants from a companion global survey. Those outside North America were predominantly from Argentina, Australia, Belgium, Brazil, Chile, China, France, Germany, India, Ireland, Italy, Mexico, the Netherlands, Russia, Singapore, South Africa, Spain, Sweden, Switzerland and the United Kingdom, among others.
- Seventy-nine percent of the North American executive respondents are male, while 21 percent are female. Overall, their average age is 51, and they report an average annual compensation (salary plus bonus) of \$220,000.
- Of executives surveyed, 22 percent are the President, CEO, COO, Partner or Chairman in their organization; 18 percent identified themselves as other C-level or Senior Vice President; 25 percent are Vice Presidents; and 35 percent are Director level. Fifty-two percent hold advanced educational degrees, of which 35 percent are MBAs; 10 percent have obtained some other Master's degree; 4 percent hold doctorates; and 4 percent have a professional degree such as MD or JD.
- Thirty percent of executive respondents work in organizations where revenues are greater than \$1 billion annually.
- Seventy-one percent of executive respondents are employed, with the balance of 28 percent in or expecting to enter transition soon.
- Of the search firm professionals responding, these recruiters have been in the search industry for an average of 17 years. Of the corporate talent sourcing and acquisition executives responding, 79 percent are in leadership positions (Presidents, C-level executives, Senior Vice Presidents or Vice Presidents, Business Owners), and 14 percent are Directors in their organizations. ■



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CONTENT:

SENIOR CONTRIBUTING EDITOR AND AUTHOR

Joseph Daniel McCool

EDITOR-IN-CHIEF

Robyn Greenspan

ONLINE EDITOR

Will Flammé

SENIOR PRODUCT MANAGER

Laura Magnuson

RESEARCH AND DATA COLLECTION:

MANAGER, REPORTING AND ANALYSIS

Jim Ashman

PRODUCTION MANAGER

Kathy Miller

SENIOR PRODUCER

Sophia Sealy-Jones

PRODUCER

Steve Markus

REPORT DESIGN:

CHIEF CREATIVE OFFICER

Susan DiAmico

CREATIVE DIRECTOR

Nick Brenia

DESIGN

5050Design.com



FOUNDER AND CEO

Dave Opton

PRESIDENT AND CHIEF ECONOMIST

Mark Anderson

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ExecuNet Inc.
295 Westport Avenue
Norwalk, CT 06851
(800) 637-3126 or (203) 750-1030
info@execunet.com
www.execunet.com



295 Westport Avenue | Norwalk, CT | 06851 | www.execunet.com | 800.637.3126

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