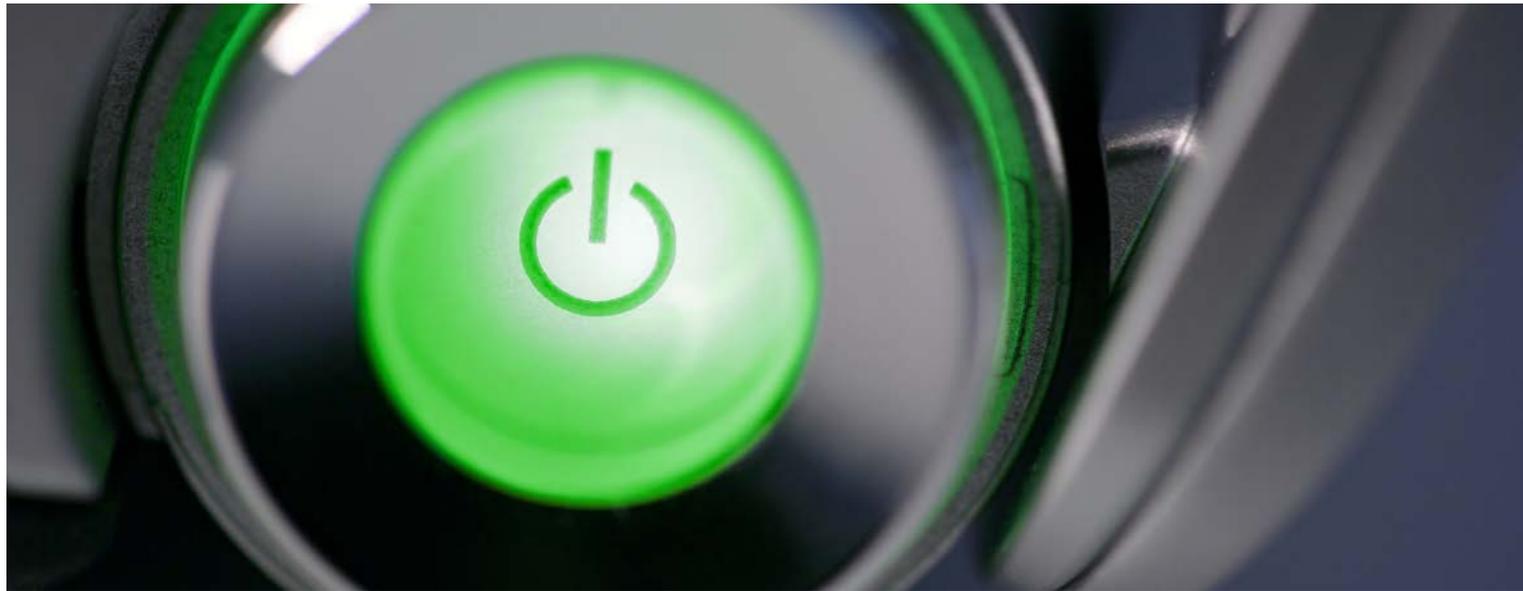


Outlook, strategy, and acquisitions

Redefining leadership



 Deloitte named a global leader in Operating Model Strategy & Organization Design Consulting by Kennedy

Source: Kennedy Consulting Research & Advisory; Operating Model Strategy & Organizational Design Consulting; Kennedy Consulting Research & Advisory estimates. © 2014 Kennedy Information, LLC. Reproduced under license

HOME

EXECUTIVE MESSAGE

Global CEO & Chairman letter

Global locations

Aspiration and values

Outlook, strategy, and acquisitions

GLOBAL LEADER FOR CLIENTS

DISRUPTION: LEADING THE PACK

LEADING TOGETHER

LEADING WITH INTEGRITY

There is no better time to improve than when you're already a respected and trusted leader. Building on our leading capabilities, trusted reputation, multidisciplinary services, and national and international reach, the Deloitte network continually improves how the professional services industry serves clients and the public interest, setting the pace for others to follow.

Deloitte's strategy—across our global network—is rooted in true leadership. Driven by clients, industries, markets, and businesses, it critically assesses and disrupts every part of our network, when necessary, to adapt to the changing environment in which we work, including:

- Increasing geopolitical changes that are reshaping the global marketplace; a shifting balance of power, a more integrated Asia, growing political unrest, and limits on wage arbitrage are creating new challenges for businesses.
- Escalating economic volatility and uncertainty, causing financial instability in some parts of the world and forcing many companies to restructure finances and governments to alter spending.
- Rapidly shifting technology paradigms where data proliferation, reliance on open innovation, and the use of data analytics are exploding, while cyber security threats worsen.
- Regulatory changes, including the potential for a markedly different global regulatory landscape to emerge at the end of a protracted period of change across several markets.

- Fluid geographic challenges presented by the expanding scope of multinationals, increased demands in emerging markets, and growing cross-border needs.

By repeatedly forging new ground, Deloitte continues to stay ahead of the considerable disruption facing clients, our people, and the societies in which we operate.

Underpinning our long-term strategy is a continued commitment to provide clients with the highest quality services through Deloitte's multidisciplinary model, delivering innovative solutions from strategy to implementation.

Deloitte member firms remain sharply focused on their distinctive abilities to address the specific needs of their clients through their distinctive skills, deep industry knowledge, and strategic investments—while bolstering trust in the marketplace and delivering value to society.

Strategic acquisitions

Deloitte actively seeks acquisitions that contribute value over size. Deloitte member firms made more than 20 acquisitions in key capability areas and geographies across the network during FY2014, helping the organization add new competencies, grow market share, diversify risk, and augment member firm client service offerings and global delivery. Key acquisitions included:

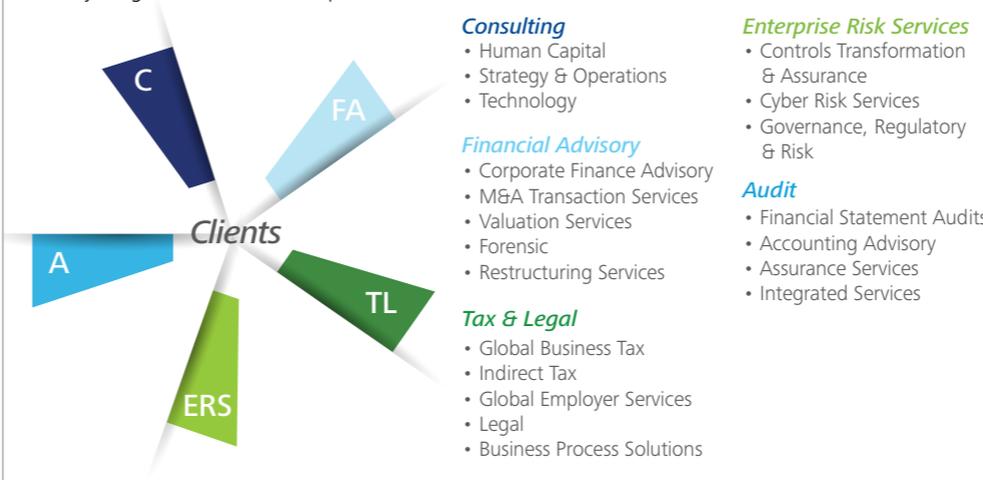
- Platon Group, a technology consulting firm in Denmark that provides information management, business intelligence, and analytics services.

ORGANIZATIONAL STRUCTURE

Solving complex problems is our passion. We've built our world-class businesses to affect change that matters, and to deliver transformational impact for clients and the communities in which we work.

Our operating model allows our businesses to work better together and enables sustained enhancement and innovations to client services and cross-border delivery, and talent development and deployment.

Our multidisciplinary portfolio empowers Deloitte professionals to deliver deep business capability and industry insights across a broad spectrum of services.



- Urgentis Digital Crisis Solutions, a Canadian cyber security specialist.
- McColl Partners, a U.S. provider of middle-market investment banking services.
- Banyan Branch, a U.S. social media and digital agency.

- NXG Business Solutions, Quattro Innovation Group, and Digicon, three Australian technology companies that enhance Deloitte Australia's capabilities in SAP enterprise performance management, cloud computing, and Web content management consulting.

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HOME

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FOR CLIENTS

DISRUPTION: LEADING
THE PACK

LEADING TOGETHER

LEADING WITH INTEGRITY

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