

Junior Staff talent standard

Financial Advisory

Mergers & Acquisitions – M&A Transaction Services

Building a *globally uniform level of quality and capability* in our core services so that our clients experience a *consistent, exceptional Deloitte* is critical to become the undisputed leader in professional services. The following standard defines the capabilities required at the Junior Staff level for our M&A Transaction Services service line.

Leadership capabilities

We expect practitioners at all levels to embrace and live our purpose by challenging themselves to identify issues that are most important for our clients, our people, and for society and *make an impact that matters*. There are five Leadership capabilities that we require from all Junior Staff across the organization, regardless of service line. Behavioral anchors for each capability are described below.

Capability	Description	Behavioral anchors
Living Our Purpose	Builds own understanding of our purpose and values; explores opportunities for impact	<ul style="list-style-type: none"> Behaves in accordance with Deloitte values Consistently challenges self to deliver outstanding quality and value Recognizes and explores opportunities for personal impact on clients and for colleagues and communities
Talent Development	Demonstrates strong commitment to personal learning and development; acts as a brand ambassador to help attract top talent	<ul style="list-style-type: none"> Solicits feedback to build understanding of own strengths and areas for development Actively participates in key learning and development opportunities for his/her level Acts as a brand ambassador with peers and colleagues to support attraction of top talent
Performance Drive	Understands expectations and demonstrates personal accountability for keeping performance on track	<ul style="list-style-type: none"> Ensures he/she is clear on expectations and asks clarifying questions when needed Is aware of own strengths and uses them effectively to deliver high quality results Assumes personal responsibility for achieving results and supports the team by taking on additional responsibilities when needed
Influence	Actively focuses on developing effective communication and relationship-building skills	<ul style="list-style-type: none"> Engages with others to build relationships and develop a network Demonstrates ability to understand the underlying interests and expectations of others Respects and responds with sensitivity to the concerns and viewpoints of others
Strategic Direction	Understands how their daily work contributes to the priorities of the team and the business	<ul style="list-style-type: none"> Understands objectives and desired outcomes for assigned areas of responsibility and sets personal goals accordingly Seeks to understand how specific areas of responsibility contribute to broader business objectives and outcomes

Core Professional and Technical capabilities

Below are the Core Professional and Technical capabilities for M&A Transaction Services Junior Staff:

Capability	Description	Behavioral anchors
Analytical Thinking & Problem Solving	Collects, assimilates, and analyzes relevant data, using standard tools and data visualizations to help surface insights	<ul style="list-style-type: none"> Recognizes the appropriate analytical techniques for the data set and problem at-hand Contributes to the creation of analytical models and effectively uses visualization technologies (e.g. Tableau) to help team present sophisticated analyses and information in a logical manner Identifies key drivers of a defined, straightforward problem; defines the problem by what it is and what it is not Demonstrates intellectual curiosity towards technology, data, and analytics

Delivery Excellence	Manages own work against the project plan to ensure a superior client experience	<ul style="list-style-type: none"> • Completes assigned work on time, and according to specifications and quality standards • Understands role in ensuring engagement profitability • Asks clarifying questions to engagement management to reduce ambiguity • Tracks progress against work plan and identifies potential issues while remaining focused on identified priorities • Builds a working list of people, references, and tools needed to get work done
Financial Acumen	Gathers and interprets financial information to help strengthen proposed recommendations	<ul style="list-style-type: none"> • Evaluates organization's performance, financial state, and effectiveness of use of working capital and creditworthiness • Assists with the preparation of financial analysis schedules • Prepares and analyzes client's financial performance using sensitivity analysis and other standard techniques
Manages Risk & Upholds Confidentiality	Complies with quality standards, risk rules, and confidentiality guidelines to deliver results	<ul style="list-style-type: none"> • Applies Deloitte's risk policies and confidentiality procedures throughout the engagement • Appropriately applies prescribed quality checks to assigned work and documents work performed • Anticipates potential risks related to managed work/processes and escalates them in a timely fashion to engagement leadership or relevant stakeholders

Specialized Technical capabilities

Below are the Specialized Technical capabilities for M&A Transaction Services Junior Staff:

Capability	Description	Behavioral anchors
Identifies the Right Deal (Transaction Readiness)	Helps teams compile early stage diligence findings to support potential transactions	<ul style="list-style-type: none"> • Supports team in conducting a comprehensive pre-bid diligence effort by researching target's products, markets, competitors, customers, and financial performance to prepare for anticipated deal – ensures analysis is supported by robust data • Assists engagement team in assessing target valuations and deal structuring by presenting preliminary diligence
Executes the Deal Successfully	Understands the mechanics of various financial analyses performed in a diligence engagement and organizes information accordingly	<ul style="list-style-type: none"> • Supports client and confidentiality requirements by organizing and maintaining due diligence filing systems, file correspondence, and other related records on behalf of the engagement team (e.g., data room, preparing data book) • Interprets information memoranda, business plans, and publicly available information on the target business to identify financial red flags and areas for further diligence
Delivers the Promised Returns	Gathers data to allow team to effectively evaluate potential and realized synergies to support post-integration/divestiture efforts	<ul style="list-style-type: none"> • Learns the engagement flow and how the PMO drives engagement performance • Develops an understanding of how synergies are identified, analyzed, and captured, and the basic timelines of a transaction closing • Helps team meet relevant SEC or other regulatory body reporting requirements by gathering, analyzing, and preparing requisite financial information