

Senior Staff talent standard

Financial Advisory Financial Crisis – Restructuring 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 Senior Staff level for our Restructuring 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 Senior Staff across the organization, regardless of service line. Behavioral anchors for each capability are described below.

Capability	Description	Behavioral anchors
Living Our Purpose	Identifies and embraces our purpose and values and puts these into practice in their professional life	<ul style="list-style-type: none"> Lives our values and challenges others to do the same Demonstrates personal commitment to raising the bar and making an impact that matters Encourages others to find opportunities for impact; sets the pace for junior staff and peers
Talent Development	Develops self by actively seeking opportunities for growth, shares knowledge and experiences with others, and acts as a strong brand ambassador	<ul style="list-style-type: none"> Shares knowledge and experiences to support the development of peers and junior practitioners Actively seeks challenges and opportunities to build on existing strengths, develop new capabilities and learn from others Acts as a strong brand ambassador, participating in formal and informal activities focused on bringing top talent to Deloitte
Performance Drive	Seeks opportunities to challenge self; teams with others across businesses and borders to deliver and takes accountability for own and team results	<ul style="list-style-type: none"> Draws on own and others' strengths to meet personal and team objectives Collaborates within and across businesses and borders Monitors own results against objectives and seeks feedback to identify ways to improve personal and team performance
Influence	Builds relationships and communicates effectively in order to positively influence peers and other stakeholders	<ul style="list-style-type: none"> Relates effectively to people across all levels, including leaders, peers, and clients Asks insightful and provocative questions to understand the diverse views, interests and expectations of key stakeholders Adjusts communication style based on the audience in order to have maximum impact
Strategic Direction	Understands objectives for clients and Deloitte, aligns own work to objectives and sets personal priorities	<ul style="list-style-type: none"> Understands client and Deloitte objectives and takes personal accountability for aligning own work Communicates broader business objectives and desired outcomes to guide the work of others

Core Professional and Technical capabilities

Below are the Core Professional and Technical capabilities for Restructuring Services Senior Staff:

Capability	Description	Behavioral anchors
Analytical Thinking & Problem Solving	Selects appropriate methods for collecting and analyzing data, and develops informed recommendations to alleviate business concerns	<ul style="list-style-type: none"> Builds sophisticated analytical models to handle large data sets with Excel, Tableau or other relevant specialized tools/programs (e.g. IDeal) that can be interpreted convincingly Applies rigor to all analytical models and enhances a model's ability to serve as decision-making tool Is aware of relevant technology applications for data modelling and analysis and easily learns new applications Maintains a working knowledge of measurement tools, benchmarks, statistics, and metrics needed to quantify and analyze aspects of deal risk Uses simulation techniques for goal setting, forecasting, value stream modelling, among other purposes Is able to think independently to generate recommendations and propose solutions, leveraging junior staff where appropriate

Business & Financial Acumen	Applies finance knowledge to effectively diagnose a crisis situation and/or help stabilize a client's business	<ul style="list-style-type: none"> Understands basic financial concepts and cost/profit drivers for client's business Identifies potential impacts of financial and economic crisis on business and articulates the business case for proposed solutions Uses company's financial information to better understand a client's business and support recommendations Assesses and tracks key performance indicators and perform trend analysis to build sound forecasting
Delivery Excellence	Produces a high quality work product and collaborates with others to deliver a superior client experience	<ul style="list-style-type: none"> Understands how assigned areas of responsibility contribute to engagement objectives and desired outcomes Manages to deadlines to help team stay on track during a transaction, adapting to changing priorities as they arise Develops informed recommendations by combining insights from personal experiences and Deloitte subject matter experts (SMEs) with relevant technologies, methods, and/or tools
Manages Quality & Risk	Manages own work in an ethical manner with a continuous attention to quality and risk rules, and confidentiality	<ul style="list-style-type: none"> Outlines a quality assurance plan, specifying the standards, tools, and techniques to define priorities needed to provide high-quality services Mitigates deviations from required quality standards by establishing internal review cycles and monitoring progress Anticipates potential risks related to managed work/processes and escalates them in a timely fashion to engagement leadership or relevant stakeholders
Modelling	Builds models that are sophisticated, robust, and easily interpreted to inform insights	<ul style="list-style-type: none"> Understands different ways of modeling capital expenditure to different asset classes and any goodwill that arises on acquisition Tests Excel formulas independently to identify mathematical and logic errors during model testing Leverages proprietary frameworks, standards, and guidelines to enhance accuracy, quality, and standardization of financial models Proposes alternative layouts for model inputs and scenarios Articulates examples of transaction synergies and how to incorporate them into a model Interprets model's outputs and monitors key transaction measures against KPIs

Specialized Technical capabilities

Below are the Specialized Technical capabilities for Restructuring Services Senior Staff:

Capability	Description	Behavioral anchors
Financial Restructuring Advisory	Analyzes business financials to improve client's liquidity, credit availability, and shareholder's return	<ul style="list-style-type: none"> Analyzes business financials and operational metrics, and applies industry benchmarks, to highlight possible drivers of performance or underperformance Maintains a high level cash flow model based on regular updates and iterations to help illustrate impact Applies sensitivities on various scenarios so the engagement team can reach informed recommendations
Turnaround & CRO Services	Performs modeling and analysis to support strategic operational and financial improvement initiatives	<ul style="list-style-type: none"> Develops high-quality basic financial models and can confidently apply high-level sensitivity analysis on projections Assists in preparing formal and informal restructuring and liquidation proposals Participates in discussions with senior team members to develop viable operational and capital structure solutions
Contingency Planning & Insolvency Solutions	Applies high-level understanding of various insolvency/bankruptcy processes to draft progress reports, set up internal trading schedules/models, and deal with creditor claims and disputes	<ul style="list-style-type: none"> Coordinates and communicates different options with client's bankruptcy management team Applies knowledge, skills, and tools to adjudicate creditors' claims under guidance of leadership Analyzes impact on, and risk to, essential business functions or information systems to identify acceptable recovery time periods and resource requirements Drafts statutory and stakeholder progress reports on formal insolvencies Develops and maintains trading statements/accounts

**Portfolio Lead
Advisory
Services**

Anticipates emerging threats through the use of market-leading technology to uncover possibilities that others may fail to find

- Engages in portfolio management discussions to fully understand a client's investment needs and construct portfolios to ensure those needs are met
 - Meets with investment analysts and researchers to gain a better understanding of market conditions and domestic and global developments that may impact client's account balances or future investments
 - Monitors asset allocation on a quarterly basis relative to policy and goals; evaluates need to rebalance
 - Creates and delivers presentations that focus on key strategies, tactics, deliverables, and financial projections
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