

## Manager talent standard

### Global Tax and Legal Business Process Solutions

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 Manager level for our Business Process Solutions (BPS) 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 Managers across the organization, regardless of service line. Behavioral anchors for each capability are described below.

Capability	Description	Behavioral anchors
<b>Living Our Purpose</b>	Acts as a role model, embracing and living our purpose and values, and recognizing others for the impact they make	<ul style="list-style-type: none"> <li>• Holds self and others accountable for living our values</li> <li>• Challenges self and others to make an impact that matters for our clients, our colleagues and our communities</li> <li>• Recognizes colleagues and teams for the impact they make, and helps connect their contributions with our broader purpose</li> </ul>
<b>Talent Development</b>	Develops high-performing people and teams through challenging and meaningful opportunities	<ul style="list-style-type: none"> <li>• Looks for challenges and opportunities to grow team members’ expertise and talents – encourages people to stretch their capabilities</li> <li>• Supports team members’ development needs through formal and informal coaching and knowledge sharing</li> <li>• Actively supports the attraction and development of top talent</li> </ul>
<b>Performance Drive</b>	Delivers exceptional client service; maximizes results and drives high performance from people while fostering collaboration across businesses and borders	<ul style="list-style-type: none"> <li>• Sets expectations for the team, aligns their strengths to tasks, and challenges them to raise the bar while providing support</li> <li>• Encourages teams to collaborate within and across businesses and borders, proactively helps make connections</li> <li>• Provides timely feedback to team members to drive high performance</li> </ul>
<b>Influence</b>	Influences clients, teams, and individuals positively, leading by example and establishing confident relationships with increasingly senior people	<ul style="list-style-type: none"> <li>• Builds productive, long-term relationships with clients and colleagues, across a broad network, based on mutual respect</li> <li>• Demonstrates an understanding of others’ needs and interests, and sensitivity to the organizational and political climate</li> <li>• Adapts influencing approach to take account of individual and organizational sensitivities</li> </ul>
<b>Strategic Direction</b>	Understands key objectives for clients and Deloitte, aligns people to objectives and sets priorities and direction	<ul style="list-style-type: none"> <li>• Demonstrates an understanding of Global, Business and Member Firm strategies</li> <li>• Communicates the big picture – drives engagement by connecting the contributions of junior practitioners to broader Deloitte/client objectives</li> </ul>

#### Core Professional and Technical capabilities

Below are the Core Professional and Technical capabilities for BPS Managers:

Capability	Description	Behavioral anchors
<b>Laws and Rules</b>	Applies knowledge of current and proposed/pending legislation, their implications, and understands interaction across the Global Tax and Legal function, specifically with their area of expertise	<ul style="list-style-type: none"> <li>• Understands local/country-specific laws and regulations to determine their implications on clients</li> <li>• Stays abreast of proposed legislation and evaluates proposed legislation</li> <li>• Streamlines existing client processes based on current and proposed legislation and their implications to promote greater efficiency</li> <li>• Reviews proposed and existing client policies to confirm their alignment with current and proposed legislation</li> <li>• Designs and implements strategies that complement client business and operational objectives</li> </ul>

<b>Delivery Excellence</b>	Demonstrates subject matter specialty and ability to share knowledge in one or more service lines within the Global Tax and Legal function	<ul style="list-style-type: none"> <li>• Develops a network of internal and external contacts within the organization to facilitate sharing/retrieving of information; encourages others to make organizational knowledge more productive</li> <li>• Guides team in applying service line-specific, Global Tax and Legal, and firm-wide agreed standard methodologies, policies, procedures, and tools</li> <li>• Recommends updates of methodologies and tools to enhance their efficiency and effectiveness</li> <li>• Develops relationships with others who have knowledge in areas outside of main area(s) of expertise in order to bring the full breadth of Deloitte services to the client</li> <li>• Understands that competitive advantage is continuous innovation</li> </ul>
<b>Analytical Thinking and Problem Solving</b>	Enables fact-based decision making by using appropriate research techniques and analytical skills	<ul style="list-style-type: none"> <li>• Defines the scope of research activities; ensuring data and documents from client/competent authority/regulators is comprehensive and supports the research focus</li> <li>• Selects and recommends the appropriate resources to address research questions and enable targeted research; guides staff on finding appropriate resources</li> <li>• Analyzes and reviews data and uses team’s analysis to spot inconsistencies, discrepancies, and omissions in data</li> <li>• Drafts complex, well-structured communications in accordance with standard policies and procedures</li> <li>• Effectively organizes and presents complex issues, results, and recommendations to project team and clients</li> </ul>
<b>Technology Tools and Solutions</b>	Improves work efficiency, effectiveness, and client service by using common technology tools	<ul style="list-style-type: none"> <li>• Uses a wide array of technology solutions and recommends the best tools and features to decrease time spent locating and capturing information (e.g. use of standard work papers for efficient data entry)</li> <li>• Uses and recommends appropriate tools to communicate and collaborate with others and actively participates in/leads virtual sessions</li> <li>• Uses advanced software application functions and tools to produce and review high quality deliverables in a timely manner and guides others to do so</li> <li>• Leverages technology products and services to drive efficiency and resolve client issues quickly</li> <li>• Drives adoption of client focused technology tools across service line/practice</li> <li>• Spots emerging industry specific technology trends and recommends how clients can prepare for these changes</li> </ul>

### Service Line Technical capabilities

Below are the Service Line Technical capabilities for BPS Managers:

Capability	Description	Behavioral anchors
<b>Finance &amp; Accounting</b>	Drives targeted and sustainable finance and accounting solutions that reduce compliance risk, overcome operational inefficiencies, and reinforce business intelligence	<ul style="list-style-type: none"> <li>• Oversees planning and development of finance and accounting solutions to ensure alignment with client's needs</li> <li>• Commits to professional competence by discussing with the engagement team and the client's management team, technical and operational approaches to the finance and accounting solutions</li> <li>• Effectively applies local and international accounting rules and principles to solve complex finance and accounting issues</li> <li>• Owns the design of client’s fiscal and duty-related reports, identifies key issues/risks, and proposes appropriate mitigating solutions</li> <li>• Has a demonstrable understanding of the BPS methodologies, processes and tools</li> <li>• Ensures use of the technology platforms</li> <li>• Holds a vast knowledge of all functionalities of the specific software and ensures application thereof. Identifies the need for customization of software according to client's business specifications</li> <li>• Responds promptly to compliance requests by deadlines</li> <li>• Has demonstrable understanding of the accounting standards, relevant laws and regulations (including specific local laws and regulations)</li> </ul>
<b>Payroll</b>	Guides teams through the design and implementation of payroll solutions that increase compliance and optimize organizational efficiency	<ul style="list-style-type: none"> <li>• Effectively plans and manages implementation of strategic payroll solutions by combining a keen understanding of client's business strategy, regulatory landscape, and payroll-related priorities</li> <li>• Advises clients on complex payroll-related rules and regulations by combining technical knowledge with a strong understanding of the client's business</li> </ul>

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**Technology**

Designs and optimizes a client's Technology solution (e.g. ERP, RPA, Analytics) to support business objectives

- Stays current on emerging technologies and applications and helps clients clarify priorities. Develops technology strategies and supporting processes to drive business value
  - Oversees team in assessing current state technology project processes and tools, defining requirements, and implementing and testing the infrastructure to align with industry requirements, strategic business goals, and existing operations
  - Ensures client needs are incorporated into the end solution and risks/issues are addressed in a timely manner
  - Anticipates risks and implications of various technology decisions and advises clients accordingly
  - Successfully conducts multiple technology implementations over the years
  - Validates working schedules and budgets
  - Provides a working methodology that guaranties the fulfilment of goals and deadlines
  - Executes the Quality Plan to reduce the project risks, validating the deliverables quality and ensuring the approval procedures.
  - Ensures that the resources assigned to the project are appropriate and sufficient
  - Communicates and assists in change management
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