

Senior Manager talent standard

Global Tax and Legal Deloitte Private

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 Manager level for our Deloitte Private 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 seven Leadership capabilities that we require from all Senior Managers across the organization, regardless of service line. Behavioral anchors for each capability are described below.

Capability	Description	Behavioral anchors
Living Our Purpose	Acts as a role model and inspires others to embrace and live our purpose and values	<ul style="list-style-type: none"> Leads by example; is a role model in living our values Inspires others to raise the bar and deliver outstanding value to our clients, colleagues and communities Seeks out opportunities to recognize individuals and teams for the impact they make; connects their contributions with our broader purpose
Talent Development	Actively contributes to building the talent pipeline; creates a talent experience that attracts, develops and retains top talent and high performing teams	<ul style="list-style-type: none"> Identifies skills needed for the future, spots and develops high potential talent to meet emerging needs Coaches and mentors managers and other team members to develop and capitalize on their strengths and prepare them for transition to the next level Creates an experience within the teams they lead that attracts and retains top talent
Performance Drive	Creates opportunities to drive impact; anticipates client needs and delivers superior results by leveraging each person's strengths to build high performing teams across businesses and borders	<ul style="list-style-type: none"> Aligns team roles with individual strengths to build and inspire high-performing teams Coaches and empowers team members to stretch their capabilities and ensures they have access to the right resources, within and across businesses and borders, to deliver results Provides timely recognition and feedback, while holding people and teams accountable for results
Influence	Builds deep relationships across a diverse network and uses a flexible influencing style to gain buy-in and drive impact	<ul style="list-style-type: none"> Builds broad and deep relationships, that span organizational boundaries, and include a diverse network of internal and external stakeholders Effectively uses a wide range of influencing tactics, can respond effectively to complex organizational or political climates Anticipates potential conflict based on knowledge of interpersonal and group dynamics; proactively takes steps to prevent or resolve it
Strategic Direction	Translates broader strategy into a compelling team vision and goals; aligns the team and sets priorities to achieve objectives	<ul style="list-style-type: none"> Clearly communicates direction to team(s) in line with overall Global, Business and Member Firm strategies Capable of creating, owning, and articulating a compelling vision and goals for multiple teams, helping people at all levels to understand how the parts fit together into a whole
Competitive Edge	Applies deep knowledge of disruptive trends and competitor activity to drive continuous improvement	<ul style="list-style-type: none"> Actively monitors competitor activity to identify opportunities to improve Deloitte's competitive advantage Drives continuous improvement by identifying and implementing leading practices Leads and contributes to development of innovative methods and tools that increase the impact of our service offerings
Inspirational Leadership	Establishes a strong leadership brand and inspires followership through passion, integrity, and appreciation of others	<ul style="list-style-type: none"> Known for building energy and momentum within and across diverse teams Demonstrates confidence and belief in self and others; inspires followership Serves as a role model for integrity, respect and appreciation of others, including their unique strengths and differences

Core Professional and Technical capabilities

Below are the Core Professional and Technical capabilities for Deloitte Private Senior Managers:

Capability	Description	Behavioral anchors
Tax Laws and Rules	Provides subject matter expertise in current tax legislation, proposed/pending legislation, their implications, and understands interaction across the Global Tax and Legal function	<ul style="list-style-type: none"> • Demonstrates deep knowledge in area of specialization and is recognized as a tax subject matter expert • Leads client projects and solves complex technical/business issues through innovative approaches while providing direction to others • Takes responsibility for accuracy and content of written technical advice, reports, memoranda and other deliverables relevant to tax laws and rules • Applies recent developments and changes relating to relevant tax practices, rules and regulations to the client's business • Anticipates changes in tax laws and provides advice on the implications for clients
Delivery Excellence	Acts as advanced Subject Matter Expert (SME) on the key capabilities required to deliver a high quality service experience to the client	<ul style="list-style-type: none"> • Provides quality service delivery by leveraging the right firm resources assigned to the engagement/project • Acts as a trusted independent advisor by providing objective, practical and relevant ideas, insights, and advice • Takes ultimate responsibility to meet project objectives within established budget and timeline, optimizing project profitability • Assesses risks and identifies market opportunities in client projects based on knowledge of global and local quality control processes and risk procedures • Proactively identifies client needs which can be resolved by other business services provided by Deloitte, partnering with business areas outside of Tax and Legal to deliver solutions
Analytical Thinking and Problem Solving	Makes decisions with confidence based on analysis of available information to drive business success	<ul style="list-style-type: none"> • Converts analytical results into cutting edge and specific business insights and solutions • Recommends new and innovative approaches to analyze data and helps draw meaningful conclusions to solve problems • Leverages data and analysis to build a convincing business case to influence client's adoption of recommendations • Makes effective decisions with incomplete information • Encourages team to apply analytical rigor to solution development • Creates culture where knowledge sharing and learning from experience/best practices is the norm • Establishes alliances with internal and external thought leaders • Facilitates innovative solutions to client problems and drives changes to processes or ways of working based on new trends/recent developments
Technology Tools and Solutions	Demonstrates advanced knowledge of service line or market specific technology solutions	<ul style="list-style-type: none"> • Stays current on emerging technologies, standards, and applications in order to address current/potential business opportunities and client issues • Contributes to Deloitte's perspective and offerings related to emerging technologies within domain area • Assesses and implements new technologies and changes to current technologies if relevant • Assists in developing new and/ or enhancing existing methodologies and approaches • Engages meaningfully with SMEs and clients in informed discussions on relevant, emerging technologies to support choices in investments

Service Line Technical capabilities

Below are the Service Line Technical capabilities for Deloitte Private Senior Managers:

Capability	Description	Behavioral anchors
Acquisition and Application of Deloitte Private Technical Knowledge	Provides innovative ideas and solutions to clients based on extensive knowledge of current tax legislation, 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"> Provides recommendations of local/country-specific individual and corporate tax laws and regulations to understand their implications on clients; provides innovative ideas and solutions for clients based on extensive knowledge of tax regimes and marketplace conditions International Tax: Provides recommendations of complex tax special regimes in connection with international tax through relevant marketplace knowledge, recognition for technical eminence, leadership of local solutions as part of global or local client service team and through identification and mitigations of risks Estate Planning: Provides recommendations of complex tax special regimes in connection with estate tax as well as relevant marketplace knowledge, is recognized for technical eminence, provides innovative ideas and solutions to the client, and leads local solutions as part of a global or local client service team to quickly identify and mitigate risks Immigration Regimes: Leverages immigration experts to help provide recommendations with respect to immigration law and rules as well as their tax implications; is recognized for technical eminence, and leads local solutions as part of global or local client service team and quickly identifies and mitigates risks Family Wealth & Succession Planning: Provides recommendations with respect to family wealth regulatory environment, successions, transmissions of assets and trusts and foundations Industry and Markets: Identifies potential planning opportunities with respect to specific industry provisions and practices, acquires in-depth knowledge in one or more industries or market sectors, and targets leading business owners or companies in industry
Compliance	Leads and manages efficiency of tax compliance work and proactively identifies requisite changes	<ul style="list-style-type: none"> Leads solutions as part of global or local client service team and quickly identifies and mitigates risks Identifies tax planning opportunities during the tax compliance process and holds relevant client conversations Discloses client's data as part of the compliance process Provides advice to clients on compensation or other corporate planning processes that integrate the owner with the company
Application of Available Technology and Methodology	Optimizes the use and implementation of available Technologies and Methodologies specific to Deloitte Private	<ul style="list-style-type: none"> Leads development and selection of tools and technology specific to Deloitte Private to enhance the organization efficiency and effectiveness Provides direction and coaches team on how to apply global and local methodologies and tools Leads in development of new and/or modifying existing technologies and methodologies Develops tools and templates for Deloitte Private engagements Seeks new client opportunities based on available resources and research tools and communicates these to engagement teams and clients Leads in the preparation of budget for projects, coordination of projects with other service lines or services and management of budget in line with global or local methodology and policy
Relationship Management	Develops extensive network and high reputation, internally and externally, to drive new client acquisition and maintain current client relationships	<ul style="list-style-type: none"> Provides subject matter expertise when explaining to a client the rationale for collecting data along with knowledge of the client's activities, assets, or operations Leads discussions with team and client on best tax opportunities and potential structuring based on data gathered from client Leads client interviews by asking meaningful, focused questions; follows up as needed Leads others through the drafting of a proposal and scope of services and acts as highest level of expertise in this domain Determines how to use appropriate qualifications and credentials to support an offer to a new client and is able to determine an adapted level fee when entering into a new client relationship

**Effective
Management
of Deloitte
Private
Engagements**

Assesses and solves most complex and difficult tax planning advice to high net worth clients concerning protecting and growing their present assets, retirement planning, and legal/estate planning

- Uses judgement in assessing risk with client engagements and/or market opportunities, applying global and local quality processes and risk procedures
 - Identifies new potential opportunities that may be linked to the delivery of work to a client
 - Sets up framework for a team on a given engagement, including general deadlines, budget, and scope of work
 - Provides recommendations with respect to the setup and management of a family office including family governance and family constitution needs
 - Liaises with authorities in favor of the mitigation strategy agreed with the client
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