

Senior Staff talent standard

Global Tax and Legal R&D Government Incentives

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 R&D Government Incentives 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 R&D Government Incentives Senior Staff:

Capability	Description	Behavioral anchors
Tax Laws and Rules	Provides initial recommendations of current tax legislation across the Global Tax and Legal function to Manager level practitioners	<ul style="list-style-type: none"> Applies knowledge and skills of relevant practices and processes (or relevant tax rules and regulations) in area of specialization to client problems Presents findings and recommends and implements advice relevant to tax independently and consults others as needed Reviews written technical advice, reports, memoranda and/or other deliverables relevant to tax laws and rules in terms of adequacy of research conducted and appropriateness and accuracy of conclusions Assesses the business impact of recent developments and changes relating to area of tax specialization for his/her clients

Delivery Excellence	Demonstrates advanced knowledge of the key capabilities required to deliver a high quality service experience to the client	<ul style="list-style-type: none"> • Proactively manages client issues and expectations • Gains the confidence of the client by demonstrating in client interactions an understanding of their business • Monitors execution of own work to ensure adherence with quality standards, serving as an example to Junior Staff (where applicable) • Identifies potential areas of risk and discusses those issues with management • Recognizes when a client need can be addressed by one of our Tax and Legal services or products after considering applicable Deloitte policies and professional rules (e.g. independence requirements) • Plans and organizes business development efforts under the direction of others
Analytical Thinking and Problem Solving	Selects appropriate methods for collecting and analyzing data, and develops informed recommendations that shape or support the client's business strategy	<ul style="list-style-type: none"> • Conducts hypothesis testing to clarify the problem and its root causes • Interprets and synthesizes data, exercises professional skepticism to challenge data, and identifies meaningful insights to develop recommendations that most effectively support a client's business objectives • Maintains knowledge in the use of data, service line innovation, benchmarks, and business metrics to make critical decisions • Provides a vision for deliverables, develops and validates team's analysis and recommendations in context of broader project • Teaches others how to use available knowledge networks and develops network of internal and external contacts within the organization to facilitate sharing/retrieving of information • Understands that competitive advantage is continuous innovation and uses experience and proven methodologies to assist in the development of solutions
Technology Tools and Solutions	Articulates how technology enables the business and communicates this effectively to clients while ensuring appropriate technologies and methodologies are used on projects	<ul style="list-style-type: none"> • Ensures team has sufficient knowledge of technology/methodologies to complete client projects effectively by sharing best practices and tools with junior practitioners • Articulates how technology enables business processes and is able to communicate its value clearly to clients • Can speak comfortably about technology tools with clients • Articulates how technology enables business processes and is able to communicate its value clearly to clients • Translates client needs into detailed requirements

Service Line Technical capabilities

Below are the Service Line Technical capabilities for R&D Government Incentives Senior Staff:

Capability	Description	Behavioral anchors
Technical Knowledge of R&D and Government Incentive Related Rules	Prepares complex technical descriptions or legislative interpretations of R&D and Government Incentive (GI) supporting documentation, planning or structuring, and defense in case of tax audit	<ul style="list-style-type: none"> • Applies local formal application processes and local cost/expenditure calculations methods linked to R&D and GI incentive programs when providing recommendations • Identifies industry specific R&D and GI provisions/practices and adapts analysis accordingly • Keeps abreast of technical developments in the client's sector/industry or legislative changes to provide thorough recommendations • Identifies risk areas and escalates to project leadership • Identifies and understands technical eligibility and completes technical descriptions for submission in R&D applications
Application of Available Technology and Methodology	Promotes the use of Deloitte technologies to achieve efficiencies in the client's products and services	<ul style="list-style-type: none"> • Collaborates with the project team to develop a cohesive cost and documentation collection methodology and identifies the appropriate technology to implement the prescribed methodology • Leverages best practices and templates to effectively implement the project methodology • Applies local methodologies, policies, tools, and techniques into the Incentives Insight Framework (on global or regional engagements where this is being used) • Recommends methodology and tool updates to enhance their efficiency and effectiveness

Identification of Incentives Opportunities for R&D and Government Incentives Projects	Prepares, guides preparation, and conducts initial reviews of questionnaires and data requests related to R&D and GI incentive opportunities	<ul style="list-style-type: none"> • Explains the rationale for collecting specific data • Obtains and summarizes information accurately • Suggests potential application of R&D and GI incentive opportunities • Prepares for and leads client interviews by learning about the client's business, industry and recent news and participates in interviews by asking meaningful factual and functional questions
Management of Incentives/ Funding Engagements	Drafts thorough near client-ready applications for R&D and GI incentives and cost/expenditure calculations	<ul style="list-style-type: none"> • Manages against due dates and distribution lists for delivery • Ensures claim is filled to request the payment of grants or incentives and tracks progress • Recommends appropriate cost/expenditure calculation methods and offers guidance of and developments to junior team members • Carries out written and oral direct negotiations