

of all executive
transitions *fail* in
the first 18 months.

The Tax Executive Transition Lab™ at **Deloitte.**

(DESIGNED TO PLACE YOU IN THE OTHER 60%)

“A single day to map the first six months of **your journey.**”

The Tax Executive Transition Lab™ at Deloitte is a one-day experience designed to help newly-appointed executives seamlessly transition and thrive in new roles. The session focuses on the three most important resources managed by a Tax Executive: time, talent, and relationships.

The day is built around proprietary research conducted by Deloitte’s Executive Transition Program around successful executive transitions, resulting in a plan with four work streams to:

- Define and communicate your **priorities**
- Assess and develop a **talent strategy**
- Understand and influence **key stakeholders**
- Develop an **action plan** for your first 180 days



Executive Transitions

Too often, the urgent crowds out the important.

If you're not deliberate, you'll end up sleeping next to your iPhone.

I put trust in someone I should not have — so trust, but verify.

Make sure you begin to unpack the old issues and spend time with your internal customers talking about what's working and what's not working. Like all things, it's always a two-way street.

The business rarely sees tax as a business partner.

You have to take some people out fast, and make at least a few changes in the first three to six months. You need to make sure it's your team and that your people are aligned with you.

Studying Executive Transitions

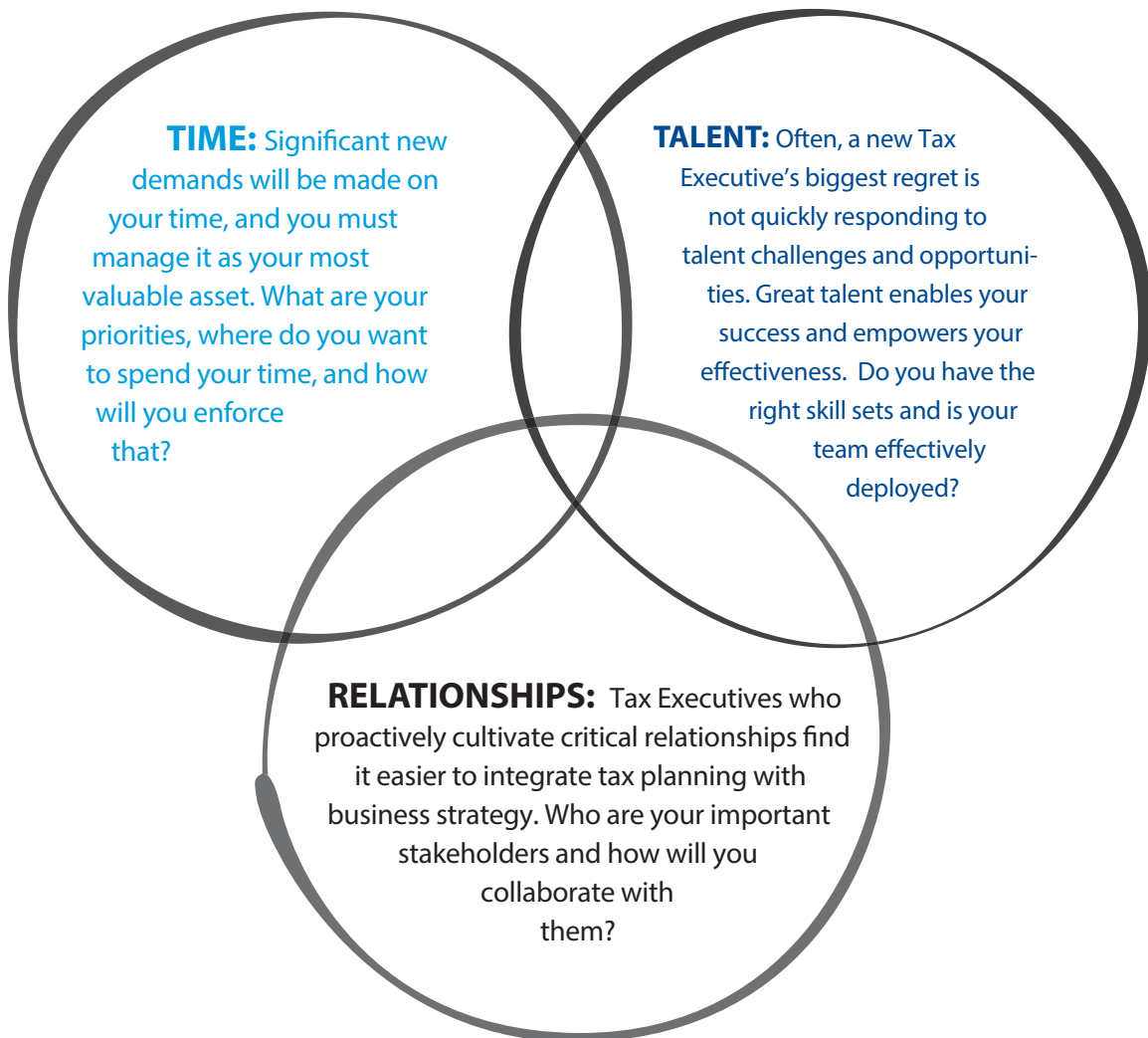
Deloitte's Executive Transition Program conducted research with more than 100 recently-appointed tax/finance executives from companies with over \$500 billion in combined revenues. Our research uncovered hidden insights about why transitions succeed and why they potentially fail. Tax Executive Transition Lab™ capitalizes on those insights.



AN EXECUTIVE'S CURRENCY

Time, Talent & Relationships

From juggling unexpected demands to shaping the right team, three issues emerged in our research as clear drivers of success (or failure) in every transition:



A PLACE BUILT TO ENSURE YOUR SUCCESS

The **Tax Executive Transition Lab™** at Deloitte.

The Tax Executive Transition Lab™ is a confidential environment where you can brainstorm issues, address questions and evaluate priorities that will impact your transition. The Lab includes a series of modules that have been validated with other successful leaders. In the Lab, you will analyze time, talent, and relationships, and identify critical success factors in each area.

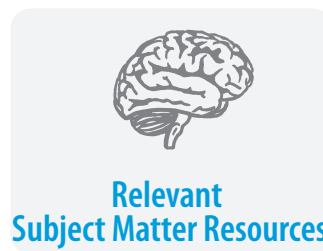
{THE LAB FORMULA}



Frameworks built on empirical data, research, focused knowledge, and cumulative learnings from 1,000+ Lab sessions.



Exercises based on behavioral research, team dynamics, and conversations with your stakeholders.



Diverse perspectives from specialists selected for their knowledge of your challenges, industry and environment.



Business practitioners experienced in collaborative problem solving and consensus building.



A laboratory environment that facilitates interaction, creativity, and collaborative brainstorming.



BREAKTHROUGH

High-impact ideas, focused team, actionable plan.

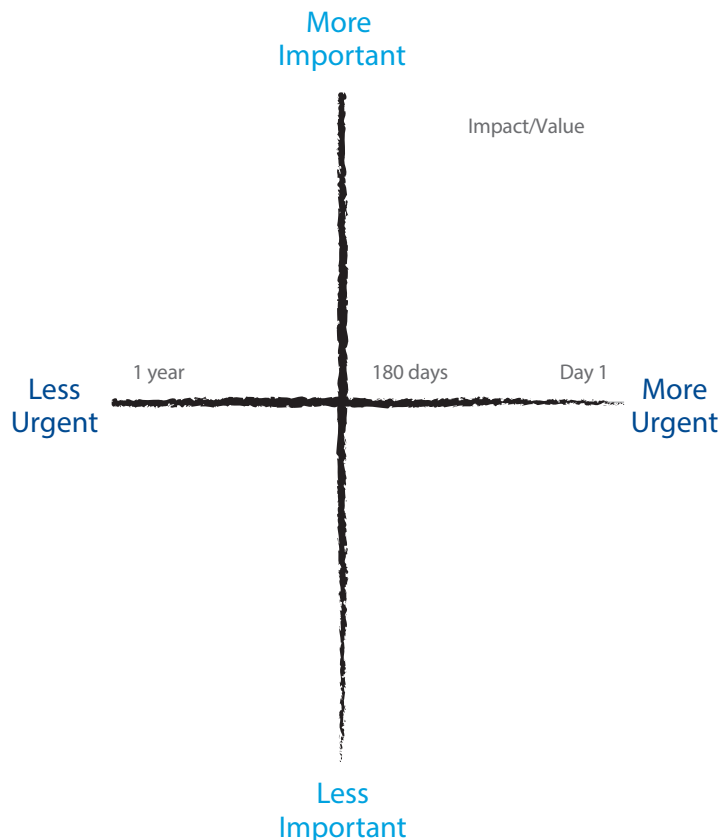
Start With Your Aspirations

1

What do you want to be known for?

We begin the day by exploring a plan for how you will positively influence the future of your organization. We will examine your hopes, fears, and the legacy you aspire to. We will also share the perspectives of your stakeholders gathered from pre-Lab interviews. The rest of the day will be focused on transforming your vision into reality.

Too often, the urgent crowds out the important, and the higher value priorities get overshadowed. Effective Tax leadership requires a long-term vision that takes into account the current business strategy. It starts by aligning your vision with the company's objectives. Decisions can then be made around the priorities that will advance the larger vision, the vision for which you will be known.



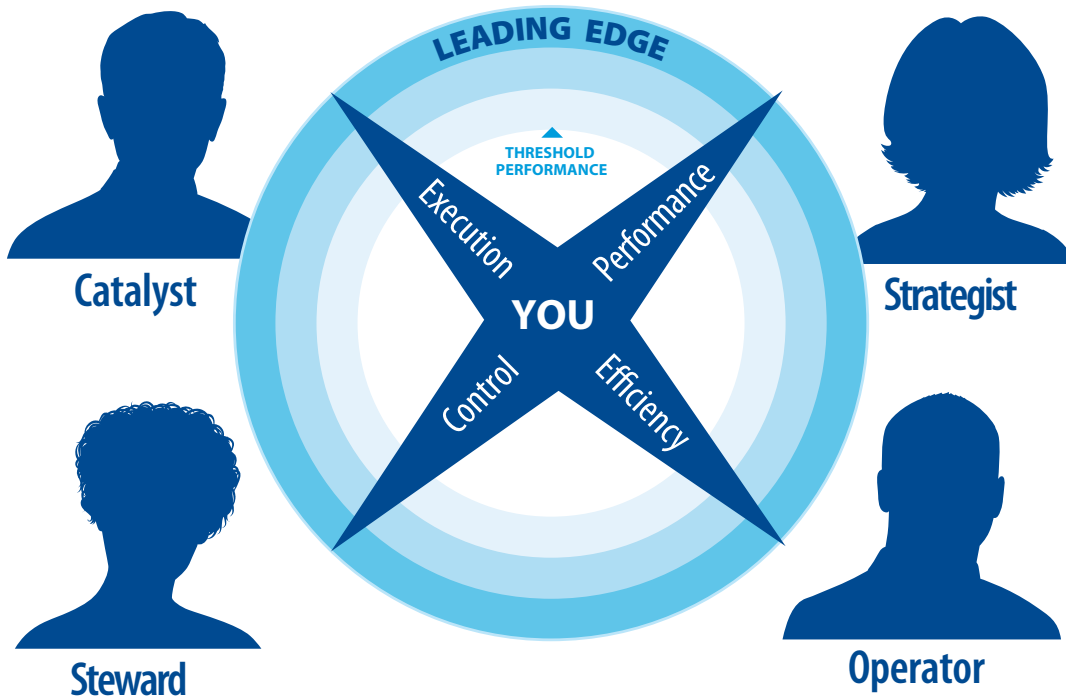
Consider Where You Spend Time

The Four Faces of the Tax Executive

As a newly-appointed Tax Executive, there will be endless demands on your time. Successful tax leaders determine early on how to balance their time and energy across four critical roles.

Catalyze behaviors to execute strategic and financial objectives.

Provide tax leadership for vital strategic business direction and long term strategies that impact performance.



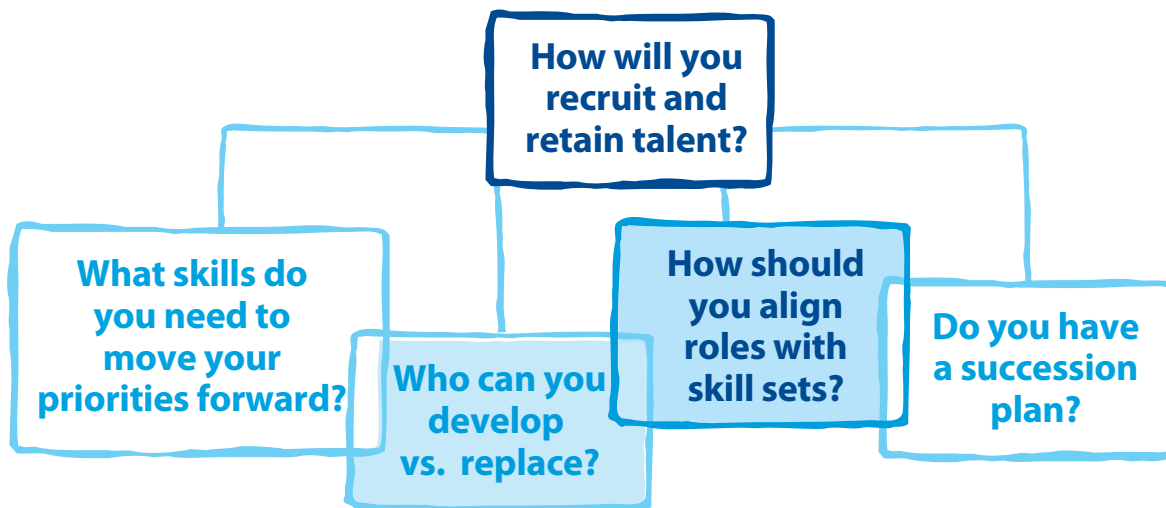
Protect and preserve the critical assets of the organization and accurately report on financial position and operations.

Balance capabilities, talent, costs and service levels to efficiently fulfill the tax function's core responsibilities.

CURRENT% (time allocation) **vs.** **FUTURE%** (time allocation)

Assess Team & Talent Issues

Most transition successes are founded on a leader's ability to effectively utilize talent. Identifying team members who will advance your priorities is critical and should occur in an unbiased environment. In this module, you will objectively analyze skills of your available talent and help create an appropriate deployment strategy. Talent enablers and road blocks will also be identified by you in this session.



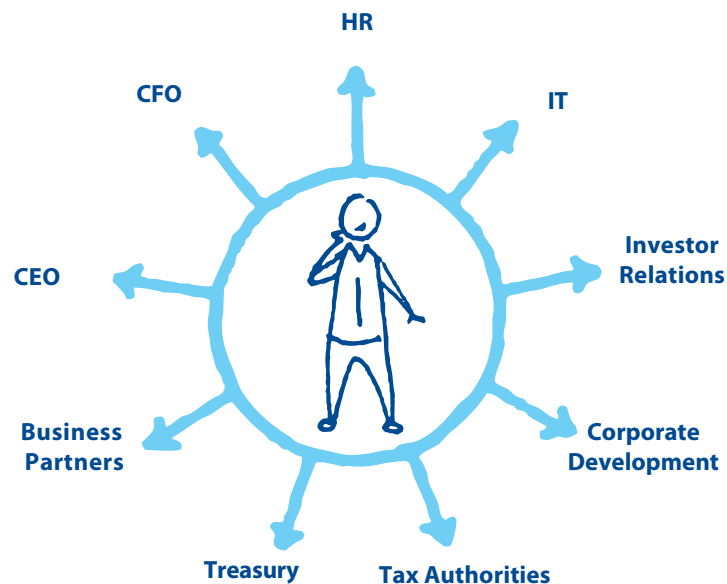
- High confidence
- Med confidence
- Low confidence

Assess confidence in each team member's ability to execute your vision.

Examine Relationships & Influence

4

Understanding critical relationships and how to influence effectively is a leadership necessity. You will identify the relationships that matter for the major issues you will be facing and determine the appropriate level of interaction.



In this module, you will :

- Evaluate which stakeholders are critical to each of your priorities
- Brainstorm what strategies can be used to successfully influence them
- Understand differences in communication styles, and learn to adapt your communications to the personalities of various stakeholders



Moving from intent to action requires a plan.

Your day-long session in the Lab culminates in the creation of a 180-day plan, customized to your top priorities and based on the identified action items related to talent and relationships that are required to achieve those priorities.

The plan is populated with relevant organizational milestones including issues that require immediate attention, as well as longer-term priorities that are critical to the success of the organization and your legacy as a Tax Executive.

Get started on your personal transition plan.

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