



## Tax Executive Transition Lab™ Plan Your Success

The role of the Tax Executive continues to evolve under the global tax reset, especially with tax reform. Tax Executives are being called upon to do more with less while facing increased expectations from their stakeholders. They are focused on maximizing their impact as a strategic business partner while continuing to oversee the day to day operations of the Tax function. To help newly appointed Tax Executives, and those with prior experiences, make efficient and effective transitions, we created the Tax Executive Transition Lab™ experience.

### Studying Executive Transitions

Deloitte's Executive Transition Program conducted extensive research and uncovered insights into what makes executive transitions successful, as well as the common pitfalls.

The three critical elements that emerged as clear drivers of success in every transition are time, talent and relationships. Deloitte's Tax Executive Transition Lab™ capitalizes on those insights.

### Tax Executive Transition Lab™ Overview

The Transition Lab is a one-day experience designed to help new Tax Executives hit the ground running and develop a plan to accelerate success.

The plan is built around what have been found to be the critical work streams:

- Define and communicate your **priorities**
- Assess and develop a **talent strategy**
- Understand and influence **key stakeholders**
- Develop an **action plan** to execute priorities

**TIME:** Significant new demands will be made on your time, and you must treat it like your most valuable asset. What are your priorities, where do you want to spend your time, and how will you enforce that?

**TALENT:** Often, a new Tax Executive's biggest regret is not quickly responding to talent challenges and opportunities. Great talent enables your success and empowers your effectiveness. Do you have the right skill sets and is your team effectively deployed?

**RELATIONSHIPS:** Tax Executives who proactively cultivate critical relationships find it easier to integrate tax planning with business strategy. Who are your important stakeholders, and how will you collaborate with them?

## A Place Built to Facilitate Your Success

The Lab is a confidential environment where you can brainstorm issues, address questions and evaluate priorities that will impact your transition. In the Lab, you will explore time, talent, and relationships, and identify critical success factors in each area.



### Research-Based Content

Frameworks built on empirical data, research, focused expertise, and cumulative learnings from 1,500+ Lab sessions



### Immersive Methods & Exercises

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



### Relevant Subject Matter Resources

Diverse perspectives from specialists selected because they know your challenge, industry or business



### Highly-Trained Facilitators

Business practitioners specializing in intervention, disruption, alignment, and consensus building



### Custom-Designed Environment

Movable panels, flexible furniture, and an intimate space built to spark conversation



### BREAKTHROUGH

Breakthrough ideas, aligned team, defined next steps

## Planning Ahead

### What Tax Executives can expect to explore in the Lab:

- **Transition experiences** — critical moments and organizational context
- **Hopes, fears, and legacies** — mapped to what is known about their stakeholders' agendas
- **Evaluate** — evaluate your organization's current capability of core Tax competencies
- **Priorities** — use Deloitte's Four Faces framework to assess how to deploy your time for significant impact, and identify priorities and classify the urgency and importance of each
- **Confidence** — assess the preparedness of the Tax function to execute top priorities and ways to increase confidence in outcomes
- **Talent** — examine capabilities and bandwidth of direct reports as well as the scope and efficacy of reporting relationships
- **Relationships** — focus on the strengths of specific relationships and influence strategies important to a Tax Executive's ability to achieve priorities
- **180-day plan** — create an action plan with specific milestones to pursue priorities



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