“Welcome to the team, Erica,” Jeff Orlando, Deloitte Services, LP, said as he took his seat in the small Philadelphia conference room in June 2013. Erica Bank, Deloitte Services LP, was the newest member of a small team of leaders tasked with evaluating and re-thinking Deloitte’s approach to performance management (see Exhibit 1 for a list of key leader bios). Bank, who had been with Deloitte for 13 years but was new in her role, was excited at the challenge represented by the project, but privately admitted a little trepidation.

When I was being recruited into this role, I asked the person recruiting me, “Others have set out to change performance management here before; none of them succeeded. I have a good job. Why should I take this risk?” I remember what he said. He described this scene from an Indiana Jones movie where, on his way to the Holy Grail, Indiana Jones passes the skeletons of explorers who’d gone before him and failed. It was an acknowledgement that what we’re looking to do here is hard. Many people here, and in other organizations around the world, have really tried to rethink how to do performance management, but overall there hasn’t been a lot of progress. But that Holy Grail is out there. I don’t know…somehow it sold me!

Now, Orlando, Bank, and the team, led by then Chief Learning Officer for Leader Development & Performance Ashley Goodall, had to turn their attention to the challenge at hand: figuring out what aspects of Deloitte’s performance management system could be improved—and then actually making the changes. Neither aspect of the challenge would be easy, due in part to Deloitte’s vast complexity, and the myriad of requirements that a performance management system needed to fill for the varying roles and activities reflected in a diversified professional services firm.

Deloitte in 2013

Though Deloitte was known in 2013 as an integrated professional services firm, providing audit; consulting; financial advisory; risk advisory; and tax and related services to clients around the globe, the organization’s long history began in England, in 1845, when 25 year-old William Welch Deloitte opened an accounting office in London. Four years later, in 1849, he became the first person to be appointed as an independent auditor of a public company—the Great Western Railway—a precedent that was eventually codified as a key means of ensuring public trust in the financial reports of publicly traded companies.
In 1893, Deloitte expanded to the U.S., opening an office in New York providing audit services to many U.S. companies. Over the intervening years, the Deloitte organization grew—in scale, in geographic regions served, and in lines of business—both organically, and through mergers with other similar firms. Though colloquially known as Deloitte, the organization’s legal name as of 2013 was an homage to the amalgamated nature of the organization, and to the three namesake founders whose individual visions for an international and integrated set of professional services offerings were most effectively realized when their three namesake firms were joined. Deloitte Touche Tohmatsu Limited (DTTL), a U.K. based private organization, took its name from William Deloitte; George Touche, a contemporary of William Deloitte and another father of the modern accounting industry; and Admiral Nobuzo Tohmatsu, a WWII admiral in the Japanese Imperial Navy who founded one of the largest accounting firms in the world.\footnote{Deloitte's Organizational Structure}

Deloitte in 2013 was organized as an international collection of legally independent, privately owned member firms.\footnote{Deloitte in 2013 was organized as an international collection of legally independent, privately owned member firms.} Member firms were generally limited partnerships. Each of these member firms provided services to a particular geographic region. Deloitte globally was comprised of over 10,000 partners and 200,000 professionals working across their five service lines – Audit; Consulting; Enterprise Risk Services; Financial Advisory; and Tax - and in various internally focused functions (collectively called Enabling Areas) across over 150 countries.\footnote{Because member firms, and the service lines within each member firm, were legally distinct entities, none of which could legally obligate any other to any course of action, the organization relied on a multi-layered leadership structure to ensure a cohesive global direction, consistency in client experiences, and a unified sense of purpose. At the global level, the DTTL Executive team consisted of 26 senior leaders from throughout the global organization, and included a global CEO, Chairman, leaders of each of the five service lines, 10 geographic leaders, a talent leader, a clients and industry leader, and 7 network leaders working across various advisory roles (e.g. general counsel, risk and regulatory, operations). This Executive group served as a representative council, speaking for the perspective and concerns of each business line and geographic region to the broader enterprise, and also acting as a champion of global initiatives within their region or business line. Each member firm separately was managed by its own executive team and board of directors.}

Because member firms, and the service lines within each member firm, were legally distinct entities, none of which could legally obligate any other to any course of action, the organization relied on a multi-layered leadership structure to ensure a cohesive global direction, consistency in client experiences, and a unified sense of purpose. At the global level, the DTTL Executive team consisted of 26 senior leaders from throughout the global organization, and included a global CEO, Chairman, leaders of each of the five service lines, 10 geographic leaders, a talent leader, a clients and industry leader, and 7 network leaders working across various advisory roles (e.g. general counsel, risk and regulatory, operations). This Executive group served as a representative council, speaking for the perspective and concerns of each business line and geographic region to the broader enterprise, and also acting as a champion of global initiatives within their region or business line. Each member firm separately was managed by its own executive team and board of directors.

**Service Lines** Each geographic member firm was separated into six operationally and legally distinct service lines (see Exhibit 2 for a breakdown of people by service line). Five of the service lines corresponded to Deloitte’s key client-facing services. The final service line was referred to internally as Enabling Areas, and was looked at as a comprehensive internal-facing service organization, offering a wide range of administrative, strategic, and support functions.

**Performance Management at Deloitte**

Given Deloitte U.S.’s large employee population, Talent represented a central and critical Enabling Area, encompassing the general talent management strategy and execution; a broad range of human resources functions, including Deloitte University. Performance management was a core function of Talent, and Deloitte considered performance management a critical, and mission critical, process within the organization.
Performance Management was a broadly used term, employed by many organizations to refer to a wide array of practices or systems—including feedback systems, incentive plans, and compensation processes. Mike Preston, Deloitte LLP, Chief Talent Officer (CTO) for the Deloitte U.S. Firms, saw performance management as something more than merely tying employee behavior to the organization’s mission through evaluation, feedback and incentives. In his view, performance management was really the process of developing people—and people development was, at the core, Deloitte’s competitive advantage.

We're in the development business; that's what we do. There’s a large coffee house with a mantra that they’re in the social business; they just happen to serve coffee in their stores. It’s a bit like that for us: development is who we are, it’s what we do. The better we are at developing people, the happier our clients will be and the more success we’re going to have. Performance management, for us, has to be less about evaluating our people, and much more about driving a culture of development. Our strategy is to have a leadership culture focused on the development and well-being of our people.

Dave Rizzo, Deloitte Consulting LLP, a Lead Client Service Principal, and the Chief Talent Officer for Deloitte Consulting in the U.S., expanded on the idea of a development culture.

We are trying to accomplish four things with our performance management program. One is engagement: we can either highly engage, or disengage, people. Second, it should be a way to differentiate performance. Third, it needs to be a mechanism for differentiating the value of individual contributions. And finally, it needs to enable development.

**Deloitte’s Approach to Performance Management in 2013**

Preston’s observation that talent was the key to Deloitte's success didn't represent a fundamental shift in Deloitte's philosophy around talent: in fact, Deloitte leadership had, for many years, acknowledged the importance of Deloitte’s people by investing extensive resources and time in their rigorous performance management process. Orlando pointed to Deloitte’s time investment as evidence of its commitment to developing people, reflecting that, “We’re proud of the fact that we spend 1.8 million hours per year here.”

The 1.8-million-hour investment was the product of a performance management cycle serving as a primary feedback mechanism for all employees across the entire organization, as well as a key determinant in compensation adjustment decisions. The process involved two key roles: team leaders and counselors, and culminated in an extensive end-of-year process.

**Team Leaders** Most professionals, given the project-focused nature of Deloitte’s business, spent their year working on multiple projects, with a variety of different project teams, and for numerous team leaders. As each project came to a close, team leaders were expected to complete a project evaluation (PE) for each team member. These project evaluations were collated and summarized for...

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*a* In the academic literature, performance management is a “continuous process of identifying, measuring and developing performance in organizations by linking each individual’s performance and objectives to the overall organization’s mission and goals”. In short, performance management is a means of aligning individual behavior with organizational goals, and ensuring continued alignment through some sort of recurring or ongoing process of feedback or control. The key components of most performance management systems tend to be evaluative processes (e.g. performance reviews), feedback processes, and incentive systems.
professionals twice a year—at mid-year, and at year-end—and became a key data point in the year-end evaluation process.

A PE took the form of a typical performance evaluation. Team leaders were expected to assign an overall rating, and to also identify three areas of strength and three areas of development in large free-form text boxes, for the professional. The process was initiated by the team member, who completed the same form as a self-assessment and then routed it to the team leader to consider as an input. Due to the open text format, PEs took some time to complete as the team leader had to complete one for each member of their project team. Because the evaluation forms were collected every six months, as these deadlines approached, project leaders would have to focus their energies on completing the various evaluation forms for their projects over the prior six months. Team Leaders were expected to review completed project evaluations with their Team Members, including the project rating, strengths and development areas, as a forum for providing feedback and planning development.

**Counselors** Each professional in the organization was assigned a Counselor. Counselors were a resource for their counselees, providing career guidance and navigation support, and also served as an agent of the organization.

Counselor was not a job, but rather a role many of the professionals within the organization held for some subset of professionals. The organization was hierarchically structured with eight basic levels. The highest level (level 8) included all partners, principals and managing directors; the lowest level (level 1) included many entry level functions. Each professional in the organization (except for those partners and principals at level 8, who followed a different process) was assigned a counselor from within their service line and member firm. Counselors, as a general rule, occupied a position two levels higher than the focal professional—meaning that many (or most) professionals, from level 4 through level 8, served as a counselor for some number of professionals.

**End of Year Process** The counselor’s role heated up, in earnest, as the end of each fiscal year approached. Before both a mid-year and year-end touchpoint, counselors were expected to collect all of their counselees’ project evaluations. They then would combine those PEs with other performance data, like quantitative metrics and ‘firm contributions’—Deloitte’s term for extra-curricular activities their people engaged in beyond their client work. Finally, they would incorporate qualitative insights that they gathered by speaking with the counselee’s team leader(s) and others and gathering a few key bullet points about the counselee’s performance and progress.

At year-end, they were expected to use all of this information for each counselee to propose an appropriate overall year-end rating—from 1 to 5, with 1 the highest possible rating, and 5 the lowest possible rating—to a broader group of fellow counselors from the same member firm and service line, so that all professionals discussed in the consensus meeting were generally comparable by virtue of their role, service line, and function. Like many organization, ratings followed a suggested distribution, and were relative, not absolute. The highest and lowest ratings were received by a small subset of the population, with the majority of professionals receiving ratings in the middle. The counselors in each consensus meeting discussed each professional, one by one. In effect, a counselor made a rating recommendation for each of their counselees, then calibrated that recommendation with their peer counselors during the end-of-year process. They then represented the organization’s final rating decision to their counselees, explaining the collective view of the leadership team based on that calibration discussion.

Sometimes, these ratings became a component of employees’ professional identity—particularly for those professionals who received 1 ratings. Peter DeMartin, Deloitte Services, LP, a National Compensation Leader for the U.S., recalls “Many people ascribed an intrinsic value to an employee’s
rating. It was almost like that rating number was on your forehead, and it had an influence on whether you were going to be considered for a particular role.*

**Compensation.** But a professional’s rating wasn’t merely an indicator of professional status; it was also one of the performance inputs to the professional’s compensation adjustment from year to year. Those with a 1 rating typically received the largest increase while those with a rating of 2-5 typically received lower adjustments.

**Consensus Meetings.** A significant proportion of the hours spent on performance management were spent in consensus meetings, with counselors meeting to determine their respective counselees’ final ratings. Mike Preston referred to this aspect of the process as "centralized calibration". This calibration was an important function. Monica O’Reilly, Deloitte & Touche, LLP, then Chief Talent Officer for the Deloitte Advisory business in the U.S., emphasized the importance of this calibration function:

> It goes back to compensation. Once you get to that number—the rating—it’s a pretty algorithmic way of looking at things. We have a finite number of dollars to distribute. Some years somebody is going to, as they say in baseball, “knock the cover off the ball” and you want to be able to reward them. But because we only have so much money allocated, if you have too many ones, the high performers’ compensation is diluted; you can’t give them as large a bonus.

The rating was about more than just compensation and professional identity. Orlando described the central role ratings played in the business:

> The ratings were an important input, not only as a means of determining compensation. It was the beginning point of an entire back-end process. We had 70 different processes for which ratings was an input. Whether we paid for you to get an MBA; whether you got a promotion; what projects you were staffed on all used the ratings as an input.

Bank elaborated on the criticality of the rating in parts of the business:

> Let’s say I’m a practice leader, I’m responsible for 400, or maybe even 1,000 people. I haven’t met all 1,000 of those people, let alone worked with them in a way that I’m familiar with their work. I can’t rely on the fact that I see their work every day to make my decisions. Ratings become an important input to many of the decisions I make.

The ratings and consensus meetings helped to create a more standardized means of comparing professionals whose roles and daily activities were very different. A “1” carried a common meaning across the entire organization, as did a “2” – “5” and helped professionals gain a sense of a person’s overall contribution and performance without having to understand the various nuances and complexities of that person’s role (see **Exhibits 3** and **4** for sample role descriptions from the Tax and Consulting service lines).

**Feedback.** The counselor’s work didn’t end with the consensus meeting. They were also responsible for “closing the loop”—for having a conversation with each counselee to inform that professional of their rating for the year and a summary of related performance insights. This conversation was a feedback opportunity—a method of prompting a valuable developmental discussion. The counselor came to the meeting prepared with the content of the consensus meeting, and had the ability to provide their counselee with important insights that the professional could incorporate into their personal development plan for the subsequent year.
Time to Reinvent Performance Management?

There was no overarching global directive motivating the small team’s focus on performance management, just an increasing sense that at least some aspects of the performance management process needed to meet the more real-time needs of the businesses, and sponsorship from then Chief Talent Officer Jennifer Steinmann, Deloitte LLP. Orlando and Bank pointed to four indicators that, together, motivated their focus on evolving performance management at Deloitte.

Leadership Feedback

On an ongoing basis, Deloitte surveys its partners, principals and managing directors to gather a general sense of how things are going within Deloitte. The insights from these surveys help firm leaders understand what’s working well, any areas of concern, and ideas to improve the strategy and operations of the firm. Orlando recalls the increasing sense, via these types of feedback mechanisms, that performance management needed a closer look:

For three or four years in a row, performance management was highlighted as an opportunity. People thought we could get more value out of the process given all the time and energy that was put in. How can we make it more nimble, real-time and individualized and just plain simpler? Tweaks were made over time. But none of these were really paradigm shifting.

The Millward Brown Study

A few years earlier, Deloitte had hired Millward Brown, an international brand consulting and marketing firm, to help Deloitte better understand their clients’ perception of Deloitte’s brand and services. Orlando described how the findings were instrumental in shaping the organization's perspective of their brand value:

One of the big takeaways was that Deloitte has great people, and does high quality work, but when you look at us against our competitors, much of what we do is at risk for commoditization. The experience our clients were having working with us was similar to the experience they had with many of our other major competitors. This was a watershed moment for us: we realized that we weren’t as special as we’d talked ourselves into believing. That led to a number of things, including diversifying our service offerings and products we bring to market. But it, indirectly, also planted the seed of the idea that our opportunity to differentiate—to really create a premium-valued experience for our clients—rested in our ability to develop our people.

This growing recognition of the risk of professional services commoditization was, in part, the driver for Preston’s view that the first purpose of the organization should be developing the people who compose it. If Deloitte could be better than any of their competitors at growing and expanding talent, they reasoned, that difference would inevitably shine through in the client experience.

Deloitte University

In 2011 Deloitte U.S. opened its first Deloitte University (DU) campus outside of Dallas, TX. The $300 million-dollar learning facility was a first step in responding to the realization that talent was Deloitte’s path to differentiation. The DU campus was a physical manifestation of the organization’s commitment to investing in people, and in ensuring that the professionals who made up Deloitte had a wide range of formal and structured developmental opportunities. The developmental programs
offered at DU were wide-ranging, and the campus was broadly considered a success. But DU’s success also served to reinforce the need for Deloitte to do more. The DU experience served as a springboard for leaders in the Talent organization to think more expansively about how the organization developed talent. This broader look at talent development ultimately inspired a study, within Deloitte, of high-performing teams.

**High-Performing Teams Study**

Bank described the way that the organization’s investment in an educational campus gave way to a more focused, and data-driven, look at what leads to high levels of performance across the organization:

> Deloitte University was a huge investment on the part of our U.S. partners and principals. They basically reached into their pockets and said, “Hey, we believe in development so much that we’re going to build this home for you.” In the Talent organization, we felt this pressure—that they were also saying: “We’ve just built you this home. Now go do something differentiating with it, and with everything you do.” It caused us to take a step back to make sure our entire Talent Development strategy was fit for the future. This prompted an initial study looking at high-performing teams within the organization, and trying to figure out what sort of day-to-day environment—not just training, but actual experiences at work—lead to high performance. We learned there are three predictors of high performance at Deloitte. One is clarity of expectations. The second is a sense of connection to purpose. The third, though—the single biggest predictor of high-performance—was the opportunity to play to your strengths\(^b\). So the question for us was, "if these three conditions contribute to high performance, is our performance management process facilitating each of these three things?" (see **Exhibit 5** for summary findings from the internal High-Performing Teams study)

The team engaged Marcus Buckingham, the global researcher and author on talent, as an advisor on the internal study, which was a replication of an earlier global study conducted by Gallup across industries and continents that had similar findings.

**Moving Forward**

As Orlando, Bank and their small team settled into the conference room, the first question they faced was, in what way(s) could the performance management process evolve? What changes might better enable the organization to develop talent and engage professionals even more than it already did? How might the performance management process be restructured so as to better serve the general mandate that talent development was central to Deloitte’s competitive advantage? Carolyn O’Boyle, Deloitte Services, LP, Talent Strategy & Innovation Leader, summarized the challenge.

> The key question was ‘how do we increase the focus on development, while still preserving our ability to make business decisions about our people?’ And how do we do that in a way that motivates our people?

But they also faced the equally important question of how to affect such a wide-reaching change to a process so deep-seated and fundamental to Deloitte’s way of doing things. If change was necessary—and they were convinced that, at some level, it was—how to enact that change within Deloitte?

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\(^b\) Deloitte viewed a strength as “something you’re excited to do, something that energizes you, and when you do it, you achieve that feeling of being ‘in the zone.' You are strengthened.”
Exhibit 1   Key leader bios, ca. 2013

**Erica Bank**

Erica Bank graduated from the University of Pennsylvania with a dual major in Psychology and Near Eastern Studies. She joined Deloitte in 2000 as a Human Capital consultant where she spent 10 years working with clients on Talent Management solutions before moving into Deloitte’s national Leader Development & Performance team. Here she was a key member of the RPM team from its inception. Erica now serves the Deloitte U.S. Firms as Performance Leader where she’s responsible for ongoing experimentation, innovation, analytics and optimization of the RPM model, and strategies to enhance Team Leader & Coach effectiveness.

**Leslie Knowlton**

Leslie Knowlton received a BBA in Accounting from Baylor University and a JD from South Texas College of Law. She began her career as an auditor with Deloitte in 1989, before leaving to become controller of a multi-national drilling contractor where she managed all accounting and finance areas. Prior to re-joining Deloitte in 2001, Leslie practiced corporate finance and securities law at a major law firm in Houston. In addition to her client service work, Leslie also leads U.S. Talent Development for Deloitte. Under her direction, learning and development at Deloitte are aligned with the organization’s business priorities and designed to anticipate the evolving needs of clients and professionals operating in today’s rapidly changing marketplace.

**Carolyn O’Boyle**

Carolyn O’Boyle is a Managing Director in Deloitte’s Talent organization, serving as the Chief Operating Officer and the leader of the Talent Strategy & Innovation team. As leader for the TS&I team, Carolyn is focused on driving innovative talent solutions to continually enhance Deloitte’s talent value proposition to its 80,000+ professionals, including a refresh of Deloitte’s talent strategy, operating model, talent models, an open talent platform and a reinvented perspective on performance management. Carolyn holds a BA from Bowdoin College and an MBA from the MIT Sloan School of Management.

**Jeff Orlando**

Jeff graduated from Susquehanna University with a dual major in Psychology and French, and from Columbia University where he earned a M.A. in Organizational Psychology. Jeff began his career serving clients in the pharma and entertainment sectors, and joined Deloitte in 2007 to help build the organization’s executive development and talent management capability. Jeff served as project lead for the RPM project, beginning in July 2013. In 2016, Jeff became Chief Learning Officer, Leader Development & Performance which included responsibility for developing leaders and driving organizational performance. Jeff was promoted to Managing Director in 2017.

**Mike Preston**

Mike Preston graduated from the University of Southern California before starting his career with Arthur Andersen in 1979 serving the firm’s Tax clients. Since joining Deloitte in 2002, he’s held a number of leadership positions, including the Chief Talent Officer of Deloitte’s U.S. Tax practice, where he began the RPM journey with the firm’s first pilot group, and serving on the Board of Directors for Deloitte Tax LLP. He assumed the role of Chief Talent Officer of the Deloitte U.S Firms in 2015 where it was his responsibility to create a leadership culture focused on the development and well-being of all Deloitte U.S. employees.
Exhibit 1 (continued)

Dave Rizzo

David Rizzo received his BA from St. Michaels College and his Master’s degree from Cornell University’s School of Industrial & Labor Relations. He worked for DaimlerChrysler in its Advanced Degree Development Program for Human Resources Professionals, and then joined Deloitte as a Human Capital consultant, serving Fortune 100 clients in the consumer products, industrial products, and life sciences industries. He assumed the role of Chief Talent Officer for Deloitte Consulting LLP in 2015 where he was responsible for Consulting’s talent strategy, talent acquisition, compensation and benefits, learning and development, alumni relations and inclusion.

Heidi Soltis-Berner

Heidi Soltis-Berner holds a B.S. in Accounting and Management Information Systems from St. Louis University. Over more than two decades at Deloitte her experience spanned the full talent lifecycle, from intern to client service professional to Talent Managing Director. She served as Lead Talent Director for Deloitte Tax U.S, and then assumed the role of Evolving Workforce Talent Leader and Managing Director of Deloitte University in 2015, where in addition to co-leading the implementation of RPM across the U.S. member firms, she built high-performing talent networks including helping Deloitte address opportunities in the open talent economy, and prepared the next generation of distinctively Deloitte leaders.

Source: Company documents.
### Exhibit 2  Deloitte Global, key figures and metrics by region and service line (2013)

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<th>Revenue (US$, bn)</th>
<th>FY 2013</th>
<th>FY 2012</th>
<th>FY 2011</th>
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<td>$31.3</td>
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<tr>
<td><strong>By Service Line</strong></td>
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<tr>
<td>Audit and Enterprise Risk Services</td>
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<td>$13.0</td>
<td>$12.3</td>
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<td>Financial Advisory</td>
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<td>$2.3</td>
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<td>$5.6</td>
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<tr>
<td><strong>By Region</strong></td>
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<tr>
<td>Americas</td>
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<td>Europe/Middle East/Africa</td>
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<td>Asia Pacific</td>
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<td><strong>By Level</strong></td>
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<td>% of Women</td>
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<tr>
<td>Overall</td>
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<td>45%</td>
<td>44%</td>
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<tr>
<td>Among Partners, Principals &amp; Directors</td>
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<td>19%</td>
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<td>45%</td>
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<td>Among new partner, principal &amp; director admissions</td>
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<td><strong>Turnover Rate</strong></td>
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<tr>
<td>Overall</td>
<td>19%</td>
<td>20%</td>
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<td><strong>Turnover Rate by Region</strong></td>
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</tr>
<tr>
<td>Americas</td>
<td>19%</td>
<td>18%</td>
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<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td><strong>New Hires</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total new hires</td>
<td>51,405</td>
<td>52,440</td>
<td>49,152</td>
</tr>
<tr>
<td>Total new hire rate</td>
<td>25%</td>
<td>27%</td>
<td>27%</td>
</tr>
</tbody>
</table>

Exhibit 3  Sample job posting for a level 3 professional in the Tax service line

Name: Sample Professional  Business: Tax

Title: Tax Senior
Home Office: Seattle, WA
Tenure: 2.5 years

General Role Description

• Prepare tax documents for clients and provide tax advising services for those clients when they undertake significant initiatives with potential tax implications
• Work with 4-6 key clients concurrently. Client relationships are long-term and recurring
• Manage teams of first and second year consultants assigned to each client (2-5 per client)
• Responsible for preparing and filing tax documents on behalf of clients
• Advise clients on tax implications associated with significant transactions, acquisitions or expansions
• Most work conducted from Seattle home office

Exemplar Day Activities

• Day begins with email: respond to client queries; provide updates to managers
• Meet with staff member on client tax project: work through analysis for tax documents. Help staff member begin to construct “work papers” — detailed documents consolidating all financial information necessary to ultimately complete tax documents
• Client call: go over outstanding items on client’s project, seeking additional information on some items, and clarification on others
• Review “work papers” just completed by a staff member, identifying items needing clarification or further review by client
• Client call: discuss details for proposed expansion in order to conduct analysis and prepare proposal for presentation to the client
• Prepare report for client, outlining tax consequences of various prospective expansion schedules and financing alternatives
• Review completed tax return prior to finalizing and sending to client for final review

Source: Interview with Louis Shin.
Exhibit 4  Sample role description for a level 3 professional in the Consulting service line

Name: Marin Heiskell  Business: Consulting
Title: Senior Consultant, Transformation and Talent group, Human Capital
Home Office: Chicago, IL

General Role Description

- Lead a work stream for human capital projects. Most projects are in the realm of change management
- Work with a single client at a time. Most client engagements are less than six months in duration
- Spend Monday through Thursday of each week at the client site
- Responsible for developing and implementing human capital strategy when organizations are engaged in major change initiatives—such as mergers, acquisitions or product launches
- Includes all aspects of ensuring employees are aligned and engaged around the relevant change. This involves:
  - Understanding the nature of the change
  - Analyzing needs through interviews and other methods
  - Creating a business case for, and proposing paths forward to the client
  - Implementing change initiatives
- Manage a project team, usually including one analyst and one consultant

Exemplar Day Activities

- Day begins with a check-in with project manager to confirm priorities and deliverables for the week
- Check-in with primary client contact: provide status update, identify any changes, and confirm deliverables
- Client meeting: interviews with employees to understand schedule, scope and details of upcoming change in their department.
- Finalize hiring and development strategy in support of product launch
- Meet with analyst: outline department details and schedule from client interview, and discuss key details in service of generating full training plan for employees affected by product launch
- Client meeting: present key findings from series of internal interviews, including proposed recommendations for trainings and new hire needs. Client provides additional feedback, and proposes key changes to hiring plans based on anticipated market needs.
- Complete spreadsheet detailing hiring and implementation analysis and email to client

Source: Interview with Marin Heiskell.
Exhibit 5  Deloitte’s business case for strengths: evidence from the High-Performing Teams study

Deloitte’s Business Case for Strengths

DELOITTE surveyed
60 high-performing teams
1,954 control participants
87% response rate

Asked six questions based on research of both high-performing teams and control groups:
1. I can describe my strengths in detail.
2. The people on my team know where they can rely on me the most.
3. I have the chance to use my strengths at work every day.
4. I know what is expected of me at work.
5. My coworkers are committed to doing quality work.
6. The mission of our firm inspires me.

Successfully replicated the Gallup research finding that high-performing teams answered with a statistically significant difference in self-reported engagement from the control group.

Engagement Levels: High-performing vs. random control group

Source: Company documents, copyright © Deloitte Development LLC. All rights reserved.
Endnotes


4 “About Deloitte: Learn about our global network of member firms.”