

Deloitte's Kickstart Facilitates Exploration, Discovery, Critical Thinking for New Tax Hires

Deloitte

Best New Hire Onboarding Program

November 2020



Company Background

Deloitte.

Company-at-a-Glance	Deloitte
Headquarters	New York, NY
Year Founded	1845
Revenue	\$21.9 billion
Employees	106,000
Global Scale	US
Customers/Output, etc. (Key customers and services offered)	Deloitte provides industry-leading audit, consulting, tax and advisory services to many of the world's most admired brands, including nearly 90% of the Fortune 500 and more than 5,000 private and middle-market companies. Deloitte's people work across the industry sectors that drive and shape today's marketplace — delivering measurable and lasting results that help reinforce public trust in its capital markets, inspire clients to see challenges as opportunities to transform and thrive, and help lead the way toward a stronger economy and a healthy society. Deloitte is part of the largest global professional services network, serving clients in the markets that are most important to them. Now celebrating 175 years of service, Deloitte's network of member firms spans more than 150 countries and territories.
Industry	Professional Services
Website	https://www2.deloitte.com/us/en.html

Budget and Timeframe

Overall budget	\$300,000 (January – July 2019)
Number of (HR, Learning, Talent) employees involved with the implementation?	Four (10%-40% of time per person)
Number of Operations or Subject Matter Expert employees involved with the implementation?	10 (this included leadership stakeholders; less than 10% of time per person)
Number of contractors involved with implementation	Six for approximately six months
Timeframe to implement	Six months (from concept through implementation)
Start date of the program	July 2019

Business Conditions and Business Needs

Deloitte Tax onboards more than 1,000 new campus hires annually (students just graduating from a college or university) in the US, a figure that is growing exponentially each year. Deloitte Tax's research shows that tax campus hires fall into one of three categories:

- Those with basic accounting or taxation degrees who have completed summer internships and have had some exposure to Deloitte Tax
- Those with accounting and taxation degrees but no prior experience with Deloitte
- Those with advanced degrees and/or non-traditional degrees (e.g., law, technology, data sciences)

While more than 80% of these new hires arrive on the job well-versed in accounting and taxation topics, most have limited understanding of how professional service organizations work with clients and need additional skill development in areas such as communications, teaming, time management and prioritization. In addition, the start dates of these hires can often impact when they attend a program. To set new hires off on the right foot, all Deloitte new hires attend a standard new hire training session (called "DLaunch") in their first two days with the company. Tax new hires also attend an additional day of onsite new hire training (called "Activate") to acclimate to essential Deloitte Tax processes and practices. However, the timeframe to attend a third, more in-depth, function-specific new hire training varies depending on when the tax professionals were hired.

In the Tax function, some new hires attend the Tax-specific new-hire program within the first few weeks after their start date, while others might have been on the job with Deloitte Tax for three to five months and have completed a tax “busy season” before they are able to attend Tax-specific new hire training. Because of this difference in training timeframe, and because of new hires’ diversity in education, experience and exposures, there is often a clear design challenge for the Tax onboarding experience — around coordinating a seamless new-hire experience between all programs; in planning the technical and professional content that participants need to receive and when; and around when and how to train participants on the Tax tools and technology they will be expected to use on the job.

Before 2019, the Tax campus hire onboarding program was a “one-size-fits-all” design that did not account for these differences in learners’ experience, technical readiness or service line-specific needs. It was also very staff-heavy, requiring extensive resources to engage with and support the program. Additionally, data from the US Deloitte tax function demonstrated a clear need to develop the intellectual curiosity of tax professionals, which was not being done by the current program. More than just skilled tax professionals, Deloitte Tax needed to develop “Pre-Eminent Tax Advisors” — curious, proactive, and responsive team members with a mindset to deliver exceptional client service through understanding the bigger picture of the client’s business, the broader industry and the full range of solutions that Deloitte can provide.

To meet these needs, in late-2018, Deloitte Tax Talent Development embarked on an effort to redesign the existing campus hire Tax onboarding program. The result is Kickstart, a blended in-person program that combines function-specific technical training, cross-functional elective courses, professional development sessions and a multi-day immersive simulation that facilitates exploration, discovery and critical thinking across all areas of the Tax business.

Overview

Kickstart is a 4.5-day immersive onsite learning experience designed for tax new campus hires within the first six months of their Deloitte employment. The program follows seamlessly from the content taught in Activate, and accelerates the transition into their new role as a Tax consultant and sets them on the path to developing their intellectual curiosity and a holistic approach to client needs.

The goals of the blended learning solution include:

- Expanding practitioners’ technical acumen as well as their critical thinking, consultative, presentation and core business skills.

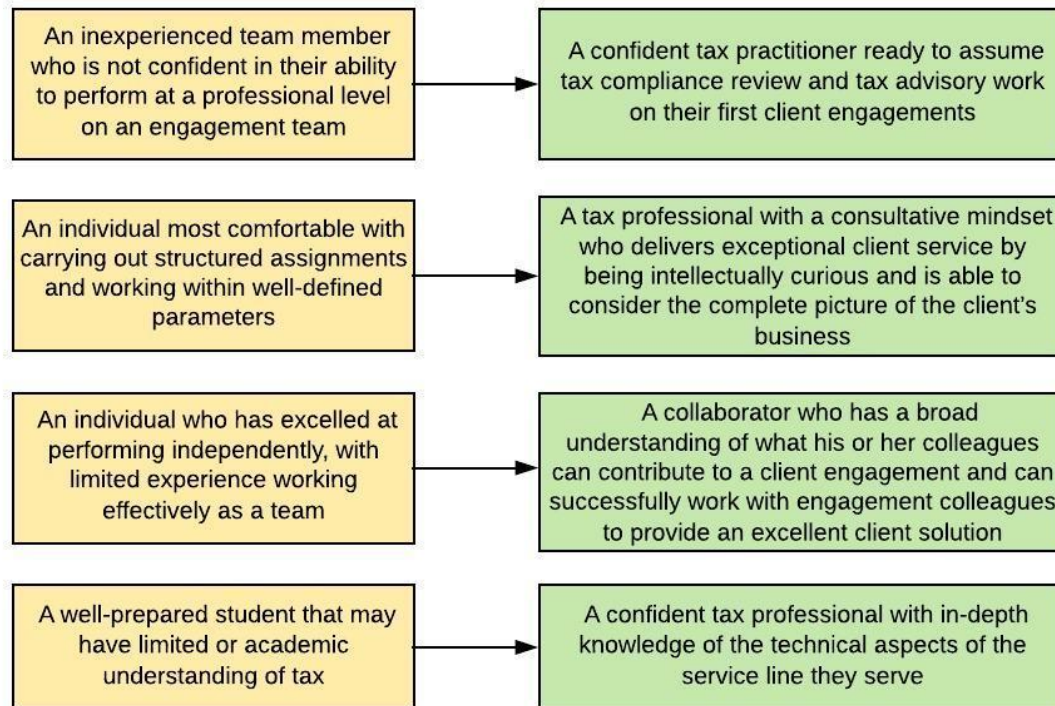
- Developing practitioners' professional curiosity and inquisitiveness.
- Developing practitioners' cross-functional awareness of all aspects of Deloitte Tax's business and fostering networking with contacts in other service lines.
- Exposure to key Professional Development concepts and processes, and completion of the first steps in each practitioner's development journey.

Design and Delivery

Upon beginning their employment with Deloitte, new campus hires spend their first two days in onsite training (called "DLaunch") to acclimate to the larger Deloitte organization, its structure, culture and essential technology and productivity tools. In Tax, new campus hires also receive an additional day and a half of onsite Tax-specific introductory training, called "Activate." Following this initial two-step launch, Tax campus hires will staff into their local office, and/or directly onto a client engagement. At some point after that, they attend Deloitte University for the immersive Kickstart onboarding program. This may occur the following week or up to five months later.

Building on the core concepts taught in DLaunch and Activate, Kickstart is designed to take learners to the next level of onboarding — to move beyond the simple "how to do" and instead teach them "how to be" at Deloitte. Research conducted on the prior version of this program indicated that campus hires come into Deloitte with certain overall mindsets — broader than simply behaviors or knowledge base (in yellow below) —that can be expanded upon and shifted toward a more success-oriented mental model (in green):

Figure 1: Changing Mindsets



Source: Deloitte

Kickstart was developed to bridge this mindset gap. After completing the program, participants are able to:

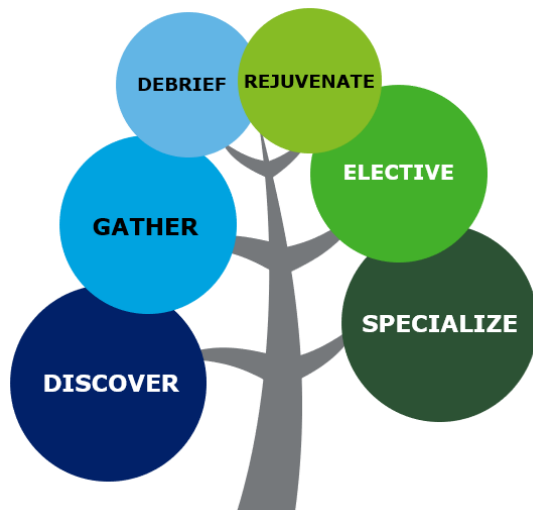
- Exercise intellectual curiosity by gaining knowledge of the client's business inside and outside the tax work.
- Demonstrate technical competence as a tax professional on engagement teams while ensuring compliance with quality and risk
- Use root cause analysis to solve problems effectively.
- Employ appropriate written and oral communication skills with the team and the client.
- Apply appropriate project and time management skills to deliver client work on time and on budget.
- Utilize internal and external tools and resources to deliver value to Deloitte's clients
- Own their Deloitte career by understanding and managing expectations for their success

Successful completion of the program will help shift participants' skills, behaviors *and* mindset, and will push them forward from "well-prepared student but inexperienced and

unconfident professional” to “confident, intellectually curious tax practitioner with the core skills to serve their clients and the resources to develop further.”

Knowing that the Kickstart program must adapt to accommodate the audience’s diverse education, experience and exposure profiles, the Deloitte Tax Talent Development team designed the program as a blended approach, structuring each day with a combination of six key program elements focused on developing intellectually curious Tax professionals:

Figure 2: Six Key Program Elements



Source: Deloitte

Gather

Each day begins with “Gather,” which sets the context and lays the foundation for the day’s programming. Participants come together and kickstart their curiosity, consider their own preparedness for what lies ahead, set their personal focus and review the topics they will explore more deeply. They are also exposed to the key concept of Business Chemistry, which teaches a simple yet powerful way to identify meaningful differences among working styles and apply that knowledge to become a more effective professional.

Discover

“Discover” is the Simulation component, wherein participants from various business areas within Tax come together to explore two concurrent and interrelated client scenarios. This Simulation runs throughout the entire 4.5-day program and includes team and individual research sessions, real-life client communication analysis, interruptions and work prioritization discussions, several role-plays of real-life meetings with real-time feedback from a seasoned Deloitte Tax professional. It culminates in a team presentation to a facilitator playing the role of a managing partner or principal. Through the Simulation, new hires not only learn how to serve clients and work effectively on engagement teams,

but more importantly they learn how to use their own intellectual curiosity to take their client service to the next level. This includes real-life practice in how to be curious about client needs and opportunities to add value to client engagements, how to develop issue-spotting skills and cross-functional collaboration opportunities, how to use root cause analysis to effectively solve problems, how to use Business Chemistry to effectively tailor written and oral communications with clients and team members at all levels and how to utilize project and time management skills to deliver their best work. Additionally, the professional development session helps new hires to kickstart their careers by exposing learners to key strategies and tools that allow them to own their career and manage their expectations for success.

Rejuvenate

“Rejuvenate” includes Lunch, Networking and Fitness/Well-Being sessions. In the prior program, participants reported that they had difficulty stepping out of their comfort zone to meet new people and regretted the opportunities they had lost to do that. Thus, the new Kickstart program was designed to provide structured activities at social events and in the classroom so that participants can exercise their curiosity to meet new people both within and outside of their service lines. Additionally, because well-being is such an important concept at Deloitte, program designers incorporated time for physical and mental health at intervals throughout each day, both inside and outside of the classroom.

Specialize

“Specialize” is the Service Line training component, during which participants separate into their business area within Tax to explore technical topics specific to that area of the business. Each session contains interactive activities and engaging graphic presentations designed to stimulate multiple learning modalities and promote retention of technical concepts. Participants also reflect on the client situations they encountered in the Discover segment of the program and use their curiosity to determine how specialized knowledge in their area of the business could address specific client issues.

Elective

Each delivery of Kickstart offers approximately 12 different Elective sessions, deep-dive technical courses on a variety of cross-service line topics. Participants choose their own electives, which encourages them to be curious about other areas of the Tax practice and to develop a high-level understanding of the breadth of services Deloitte Tax can offer to address client needs.

Debrief

Each day ends with a Debrief, a short session to review and reflect on the key learning from the day, to reconnect with peers who may have had other learning experiences through the day and to share key takeaways and real-world application ideas.

Combining these six elements each day allows participants to use their own curiosity in multiple ways to learn the keys to a successful career at Deloitte. They practice both technical and soft skills; learn about and network with other Tax service lines; explore key Deloitte systems, tools, and expectations for professional life; explore how to take the next steps in their own development; practice problem-solving and thinking outside the box to better serve clients; and, most importantly, they learn how to use their own intellectual curiosity to take their client service to the next level.

Engagement

Overall, the Kickstart program has been phenomenally successful in engaging new employees and getting them efficiently acclimated to Deloitte Tax.

Change Management Strategy

From the start, the Kickstart program was prioritized as a vital component of Deloitte's larger Tax 360 development experience. Deloitte Tax leadership are strong advocates of this program and its central drive to develop the curiosity mindset through all levels of the Tax professional development process.

Deloitte's Tax Talent Development engaged a steering committee of leaders representing all service lines from the business to validate the design and delivery plans for Kickstart. The process began in late-2018, with a full quantitative and qualitative data-collection initiative for the former Tax campus new-hire onboarding program. During the redesign process, key program design principles were socialized upward through the Tax stakeholders, to ensure the engagement and buy-in of Tax leadership. When the program was pilot-tested in July 2019, these leaders then became the program's Learning Champions, ensuring the support and engagement of the larger Tax organization.

After the pilot, the team launched an evaluation survey to capture feedback and data from pilot participants and faculty, and conducted a debrief with service line leaders and the Learning Champions. This data then was analyzed and incorporated into the program's rollout for future deliveries.

Challenges

With each delivery of the Kickstart program, the Tax Talent Development Project Leader collects robust faculty and participant evaluation data. The team continues to work with

each tax office's Learning Champion to drive adoption, recruit faculty, and fine-tune program content and delivery. As expected, several challenges still remain for the Tax Talent Development team to address:

- **Engagement** — Ensuring Deloitte's Partner/Principal/Managing Director Group Leaders are encouraging their new campus hires to prioritize attendance at Kickstart. This can be challenging for practitioners who may have already completed a "busy season" before attending Kickstart.
- **Staffing** — Even though this program redesign has significantly reduced the number of faculty needed to teach the Tax new hire campus onboarding program, each delivery still requires a significant number of senior-level Tax professionals to serve as facilitators, role players and panelists. Because the program is a week-long onsite engagement, it can be challenging to source faculty able to set aside their regular client responsibilities for a full week so they can commit to delivering the best possible onboarding experience for Deloitte's new hires. Again, the Tax Talent Development team leans on the support and sponsorship of each Tax office's Learning Champions to help source quality and committed faculty for the Kickstart program.
- **Diverse Hires** — As Deloitte Tax hires a more diverse pool of professionals (including STEM majors with no prior knowledge of accounting and taxation) to serve the needs of clients, the program is expected to evolve and change further.

Measurable Benefits

The success of the Kickstart onboarding program was measured in several dimensions, including:

- Comparing the results to the goals set at the inception of the project
- Analyzing learner survey results
- Receiving feedback from stakeholders, including key Tax leaders, program Deans and faculty

Calculating Cost- and Time-savings

In close collaboration with Deloitte Tax practitioners, Tax Talent Development not only achieved, but exceeded the target success measures across each dimension.

Project Goal Results

The table below breaks down the initial goals of the program redesign, and the success measurement for each.

Figure 3: Success Measurement

Goal	Success Measurement
1. Program structure, design and content is flexible enough to accommodate a wide diversity in participant education, experience, and exposures	The blended-learning solution allows participants from diverse education and experience levels to benefit from a wide variety of training modalities, content levels and content topics woven together into each day of the training. In addition, the overall program design is flexible enough to be adapted to an interactive virtual classroom format at low/ no additional cost.
2. A cost-effective and less faculty-intensive learning experience	Faculty needs have been reduced by 20% per delivery, resulting in overall faculty and travel cost savings of 8%-10% per year. Additionally, time spent in developing content has been reduced by 30% each year after the initial delivery, as the subject matter specialists can review and update rather than develop new content for each delivery.
3. Integrate the Curiosity Mindset to develop Pre-Eminent Tax Advisors	The redesigned simulation fosters critical thinking and a broader lens with regard to client engagements. This has resulted in Tax professionals who are more curious, proactive, and responsive team members with a mindset to deliver exceptional client service through understanding the bigger picture of the client’s business, the broader industry, and the full range of services that Deloitte can provide.

Source: Deloitte

Survey Results

Learners appreciated having both practical and real-life application to reinforce learning. They also appreciated that every activity — including the “energizers” — related to the Kickstart content. And that Kickstart focused on activities relevant to their current level and to the levels to which they aspire: “tell me what I need to do to succeed as an employee.” And they greatly appreciated having opportunities to network (in the classroom and outside) and to form relationships with professionals in other service lines whom they might not ordinarily meet.

The table below breaks down the initial reactions from the learners. Results from the old program (October 2018) are compared with July 2019 results, which was the first delivery of the new Kickstart program.

Figure 4:

Learner Feedback Category	Favorable Percentage Oct 2018	Favorable Percentage July 2019	Percent -age Change	Definition
Satisfaction	86%	89%	+3%	Rate the effectiveness of the overall training and materials including the structure and delivery
Learning	86%	88%	+2%	Determine the increase in knowledge, skillset, and/or performance as a result of completing the program
Utility	84%	88%	+5%	Degree to which the participants will apply learning to client work in the immediate or near future
Performance	85%	92%	+9%	Degree to which the program will improve learners' performance and productivity
Recommend-ation	88%	91%	+4%	Would recommend training to peers/colleagues

Source: Deloitte

Stakeholder Feedback

In general, stakeholder groups were also pleased with Kickstart's results. In the past, they felt the program had significant overlap with other new-hire training, such as DLaunch or Activate. However, Kickstart now delivers all new content tailored to each learner's level of experience and specific area of the business. Stakeholders also highly value the Service Line Training included in the program. Additionally, they report that new hires approach

clients with a more curious, consultative, problem-solving approach after completing the Kickstart program.

Figure 5: Cost-Savings and Time-Savings

Measure	Results
Cost-Savings	<ul style="list-style-type: none"> The learning solution has yielded development cost-savings of 40% for subsequent year after initial delivery Faculty needs have reduced by 30% per delivery as certain facilitator roles have been eliminated from the program
Time-Savings	<ul style="list-style-type: none"> Time-savings of 50% has been realized each subsequent year after initial delivery, as the subject matter specialists are able to review and update rather than develop new content for each delivery.

Source: Deloitte

Overall

Key Findings

Overall, the redesigned Kickstart campus new hire program has been overwhelmingly positive for both the new employees and the business. Key program impacts include:

- Enabling Tax new hires to develop a curiosity mindset at the consultant level, which will carry through to each subsequent level of their development
- Delivering a learner-centered, experiential focus that enables exploration, discovery, reflection and critical thinking across and within all areas of the Tax business
- Creating a nimble design that will be easy to adapt and change at low/no cost based on legislative updates or changes to delivery format (e.g., live classroom to virtual)
- Reducing the additional resources needed onsite to support program execution (program support, additional role-players)
- Linking to post-program education, experiences, and exposures to support ongoing development both at the service line level and on-demand

Additionally, participants reported that they will use the connections made during this training to assist with their future client engagements. The following is a sample of many participant comments from the program evaluation:

- *“Overall, the connections and relationships created through this experience is something that many of us dearly treasure; especially, when considering how we*

work together across different offices. I think it has given me more confidence to reach out and ask for help when I am dealing with an unknown or not very familiar work topic.”

Exposure to other Tax practices and cross-service line technical content was also a frequent topic of comment in participant evaluations:

- *“I thought it was a great intro to the many tax topics people will face within their careers at Deloitte.”*
- *“It was great to have a refresher on many topics (I graduated about nine months ago and some topics are a little fuzzy). The instructors gave great insight which will assist me throughout my career with Deloitte. It's great to have coworkers from various locations and service lines to network and share experiences with.”*

Lessons Learned

A few lessons learned after the initial two deliveries of this blended-learning solution, will be addressed before the next delivery:

- The timing of certain units and activities within the agenda will need to be slightly adjusted.
- Feedback indicated that some of the Tax technical tools covered in the simulation could be helpful on the job earlier. It may be more appropriate to convert this information into pre-work for the program.

What's Next

The redesigned Kickstart campus new hire program will continue to educate new Deloitte Tax practitioners as it provides multiple benefits including cost-effectiveness, scalability, flexibility, and a fun and engaging way to deliver technical and professional concepts. To prepare for future deliveries of this program, the development process will focus on the following areas:

- Continue to hone the technical training levels/topics vs. the audience levels invited to the program and also review and update content as required based on legislative updates and changes to the US Tax code.
- Adapt the live program to a virtual delivery format using virtual classroom platforms like Zoom and Centra as well as mobile learning applications (that deliver interactive, bite-sized knowledge to learners) to meet learning needs of new hires given the current travel restrictions due to COVID-19.
- Provide opportunities for structured networking both in the live and virtual formats. Forming relationships with and learning from practitioners in other

service lines has consistently been one of the most valuable results of this onsite training program, and many learners have expressed that they would engage even more if the program offered additional structured networking events.

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