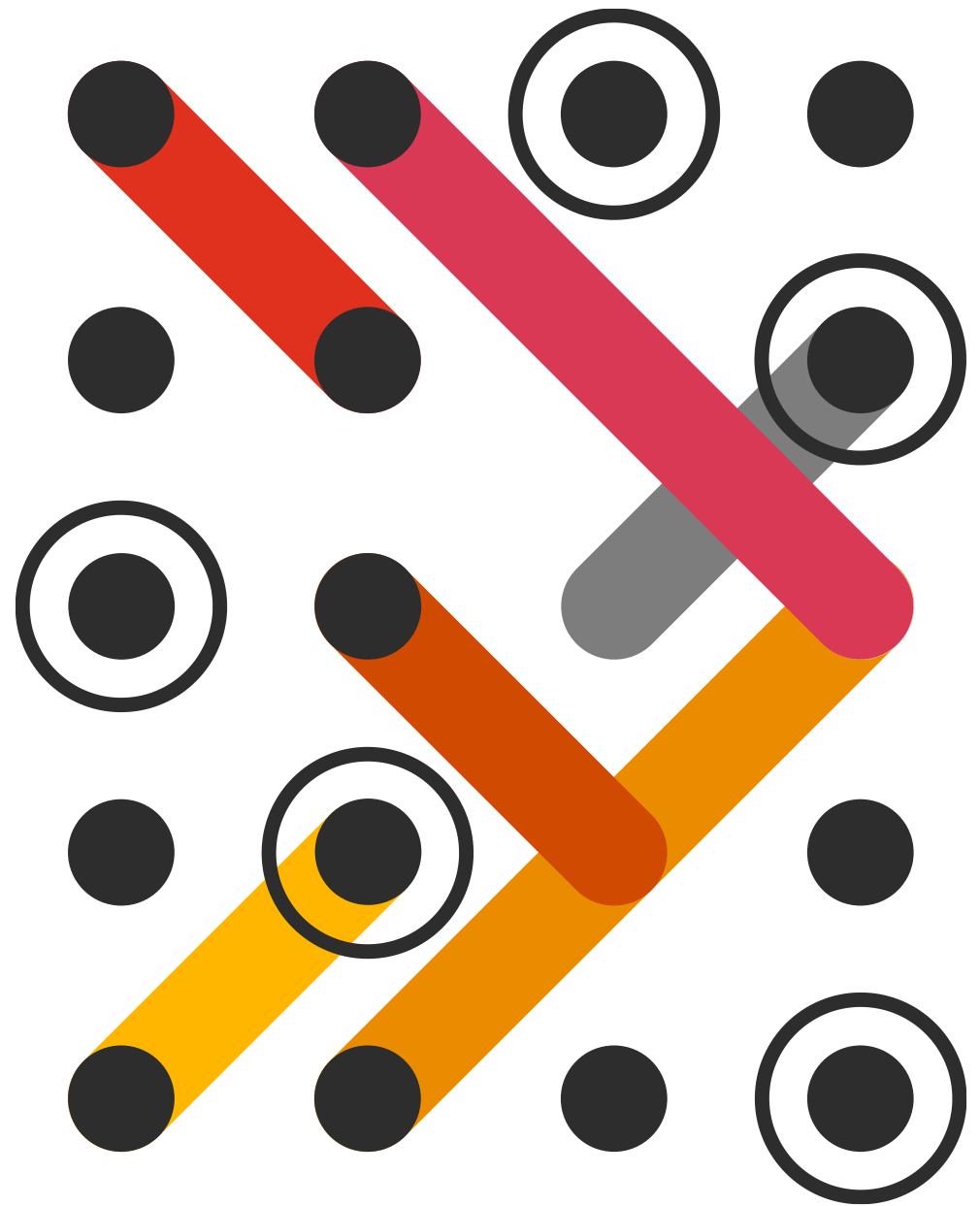
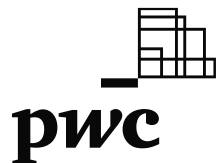
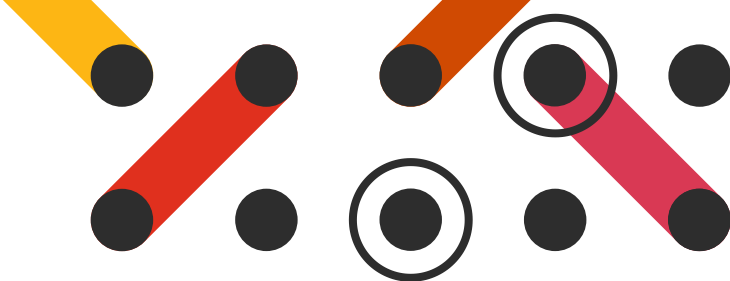


Building Essential Skills for Tax

Relationship Management



Introductions



Name
External Facilitator

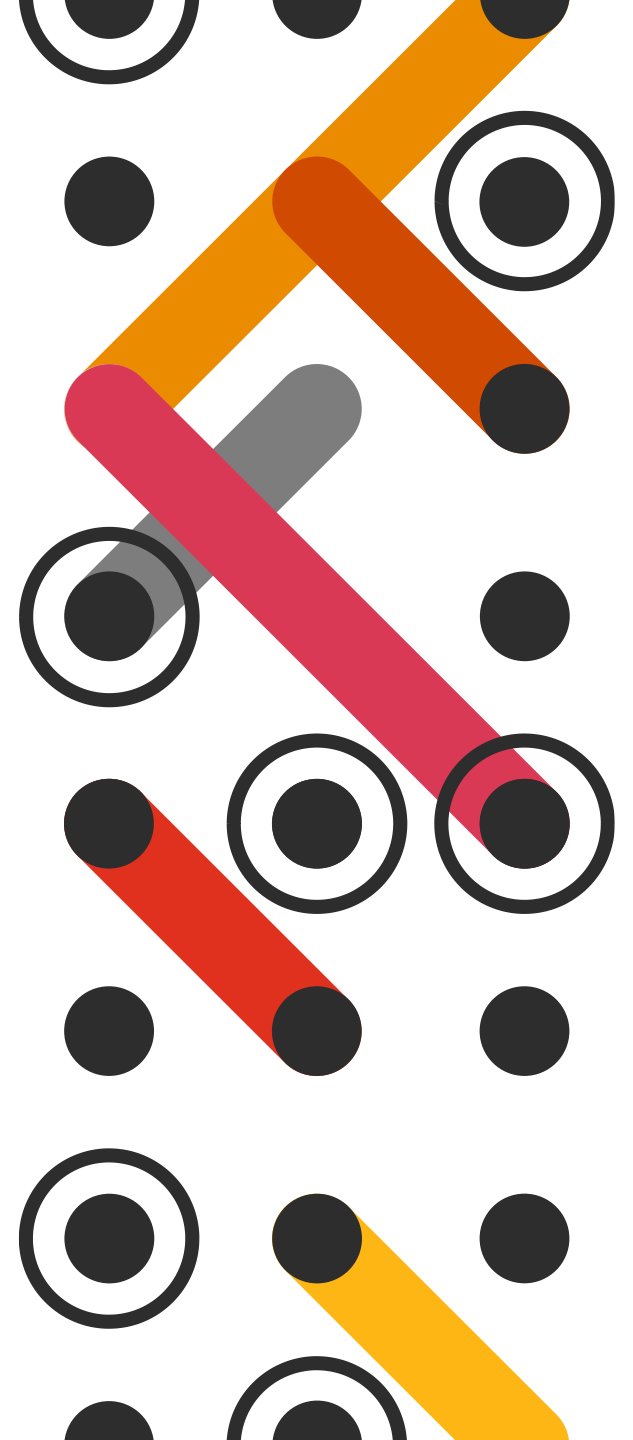


Name, Title, Role
Internal Facilitator

Relationships

As a leader at PwC, why is it important to manage your relationships?

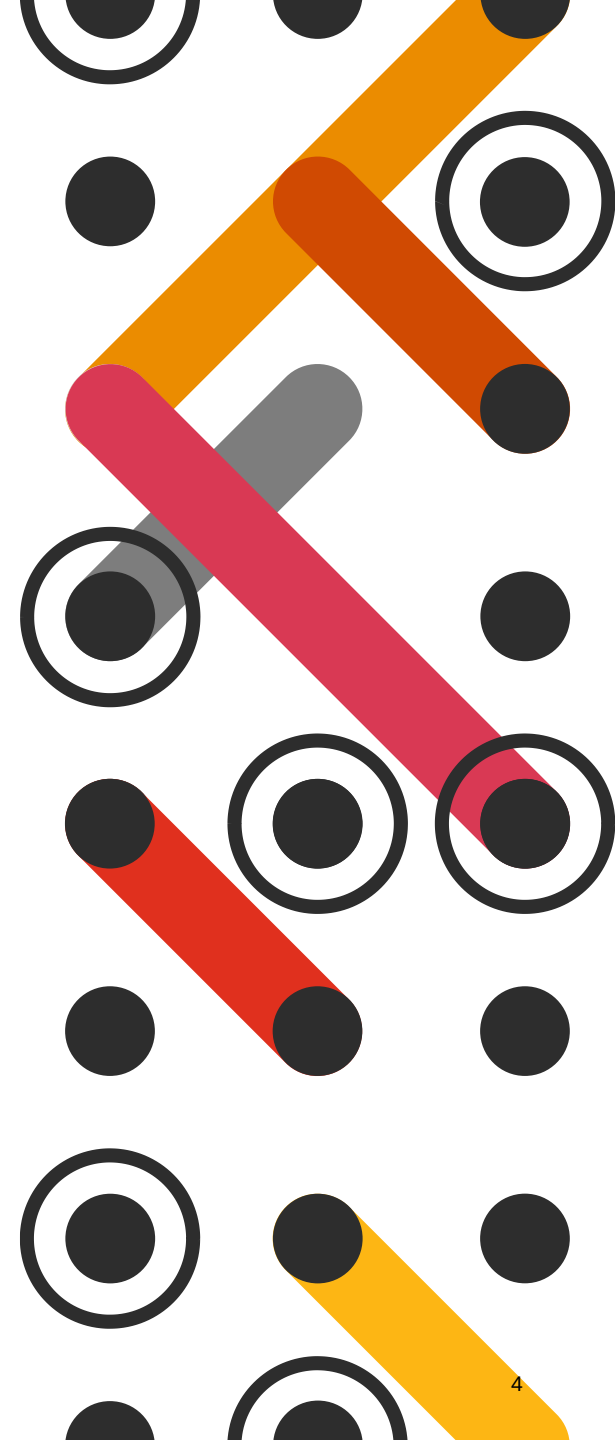
Respond to the question in Poll Everywhere.



Relationship Management Rotation

By the end of this module, you will be able to:

- Recognize the differences between how relationships are managed as a leader rather than a team member.
- Apply strategies to build trust across groups and teams
- Demonstrate how to mentor an associate to complete a specific task.





Managing as a Leader Rather than a Team Member

Chat: Effective leaders

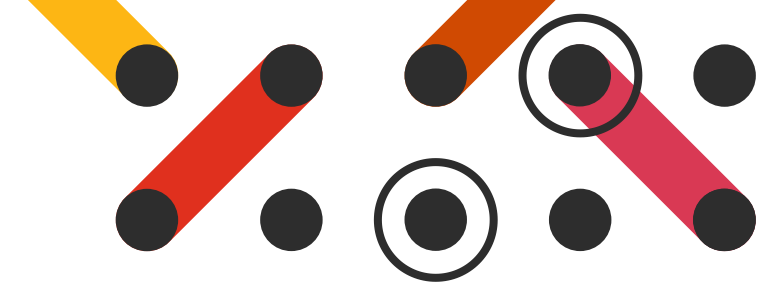
Type your response in chat.

What behaviors do you observe from leaders you admire?

What you do want to be known for as a leader?



Qualities of an effective leader



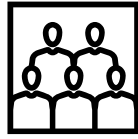
Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.



Decision making



Adaptability



Team relationships



Communication



Motivation



Integrity



Accountability



Proactiveness

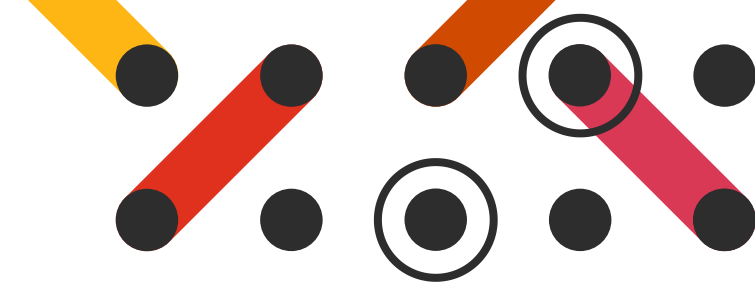


Empathy



Empowerment

Qualities of an effective leader

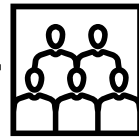


Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.

Leaders inspire and motivate their team members to achieve their best performance. They provide recognition and rewards for accomplishments, offer support and encouragement, and create a positive and motivating work environment. They also set high standards and challenge their team members to reach their full potential.



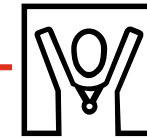
Adaptability



Team relationships



Communication



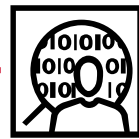
Motivation



Integrity



Accountability



Proactiveness

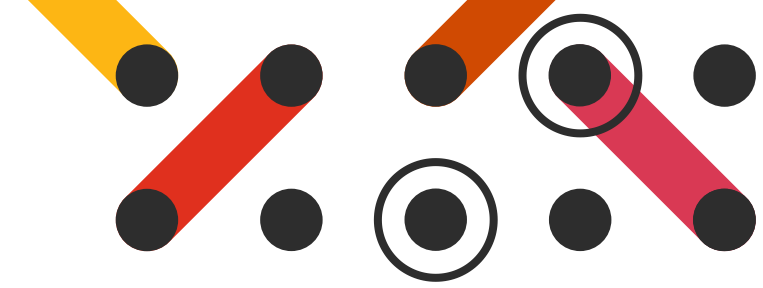


Empathy



Empowerment

Qualities of an effective leader

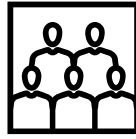


Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.



Decision making

Effective leaders are adaptable and flexible in the face of change and uncertainty. They are open to new ideas and perspectives, and they encourage their team members to embrace change and learn from challenges. They are resilient and able to navigate through obstacles and setbacks.



Team relationships



Communication



Motivation



Integrity



Accountability



Proactiveness

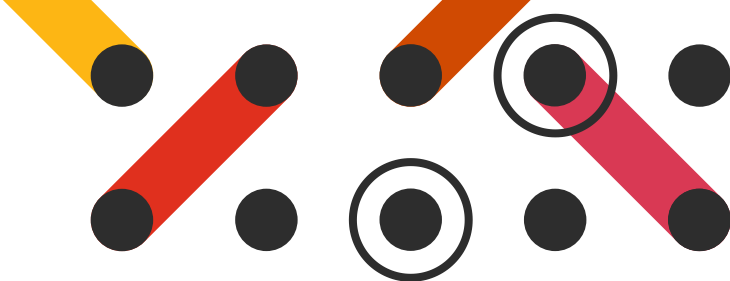


Empathy



Empowerment

Qualities of an effective leader



Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.



Decision making



Adaptability

When collaborating with teams across different locations and segments, it is important to be mindful of their preferences, including work schedules, communication preferences, work style, and feedback. It is crucial to understand and respect the cultural differences within the team.



Communication



Motivation



Integrity



Accountability



Proactiveness

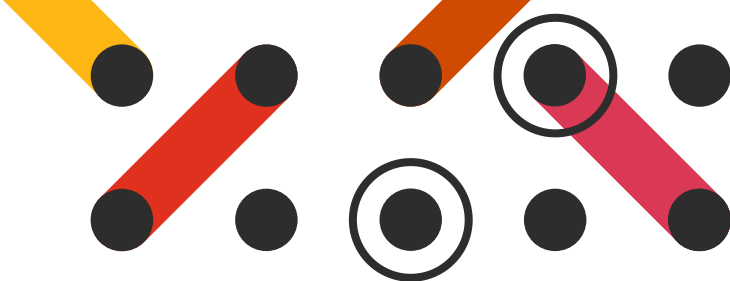


Empathy



Empowerment

Qualities of an effective leader



Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.



Decision making



Adaptability



Team relationships

Effective leaders are skilled communicators who can clearly articulate their vision, goals, and expectations to their team members. They actively listen to others, provide feedback, and encourage open and honest communication.



Motivation



Integrity



Accountability



Proactiveness

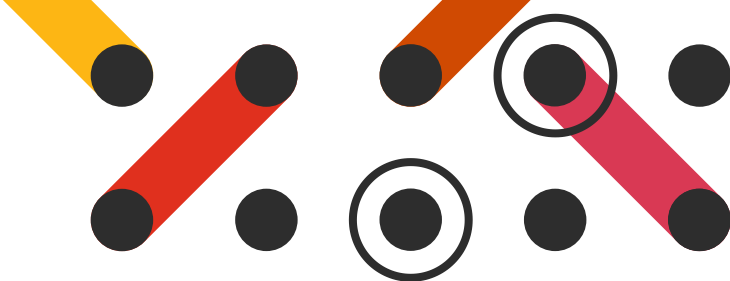


Empathy



Empowerment

Qualities of an effective leader



Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.



Decision making



Adaptability



Team relationships



Communication

Leaders inspire and motivate their team members to achieve their best performance. They provide recognition and rewards for accomplishments, offer support and encouragement, and create a positive and motivating work environment. They also set high standards and challenge their team members to reach their full potential.



Integrity



Accountability



Proactiveness

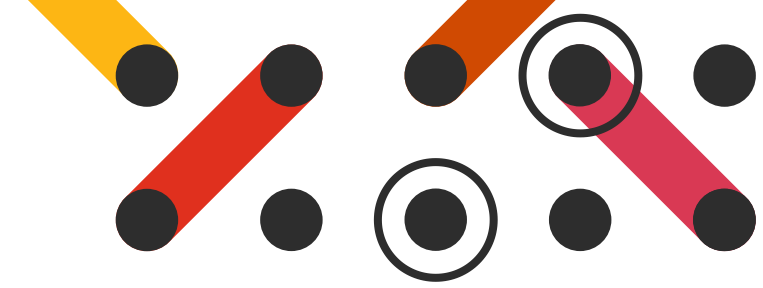


Empathy



Empowerment

Qualities of an effective leader



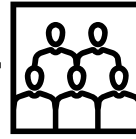
Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.



Decision making



Adaptability



Team relationships



Communication

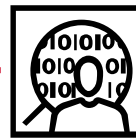


Motivation

Leaders demonstrate integrity by acting ethically and consistently with their values. They are honest, transparent, and trustworthy in their interactions with others. They lead by example and inspire trust and respect from their team members.



Accountability



Proactiveness

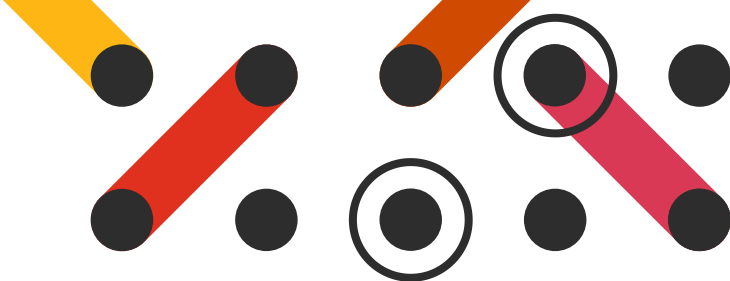


Empathy



Empowerment

Qualities of an effective leader



Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.



Decision making



Adaptability



Team relationships



Communication



Motivation



Integrity

Leaders hold themselves and their team members accountable for their actions and outcomes. They set clear expectations, establish performance metrics, and provide regular feedback and coaching. They also take responsibility for their own mistakes and learn from them.



Proactiveness

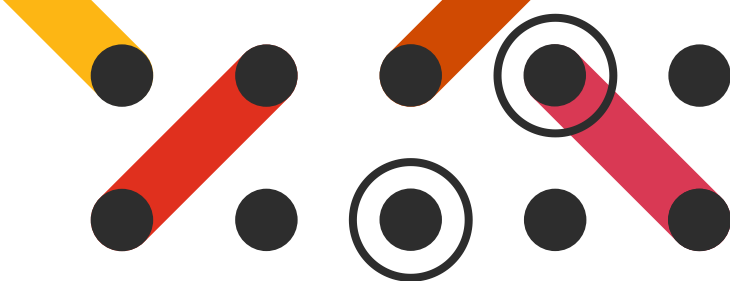


Empathy



Empowerment

Qualities of an effective leader



Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.



Decision making



Adaptability



Team relationships



Communication



Motivation



Integrity



Accountability

Proactive leadership refers to taking initiative and being forward-thinking in guiding and influencing a team or organization. It involves anticipating challenges, identifying opportunities, and taking action to address them before they become problems.

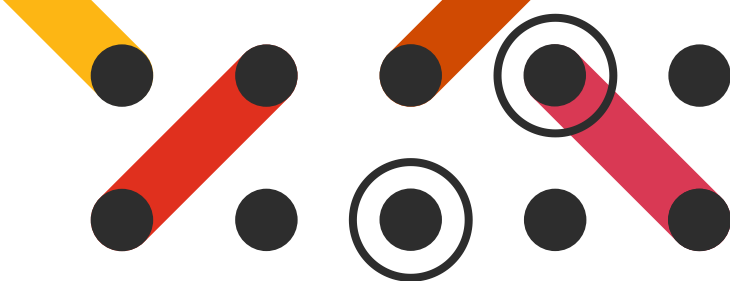


Empathy



Empowerment

Qualities of an effective leader



Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.



Decision making



Adaptability



Team relationships



Communication



Motivation



Integrity



Accountability



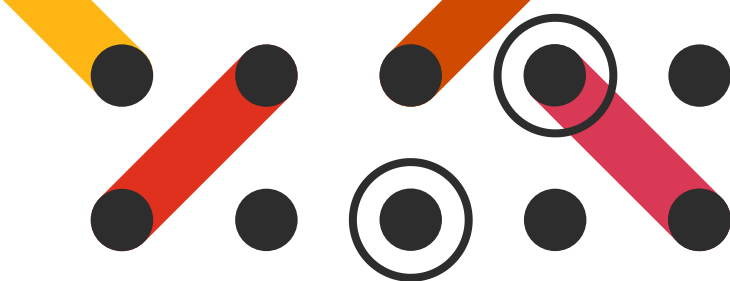
Proactiveness

Good leadership indeed involves empathy. Empathy is the ability to understand and share the feelings, perspectives, and experiences of others. When leaders demonstrate empathy, they can connect with their team members on a deeper level, build trust, and create a positive and supportive work environment. To provide empathy you can involve understanding and supporting individual needs, being an active listener, building trust and supporting personal and professional growth.



Empowerment

Qualities of an effective leader



Good leadership behaviors are important as they inspire and motivate others, build trust and credibility, enable effective decision-making, develop talent, and create a positive work culture.



Decision making



Adaptability



Team relationships



Communication



Motivation



Integrity



Accountability



Proactiveness



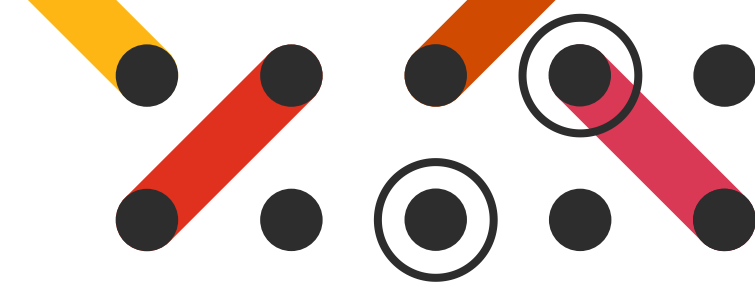
Empathy

Good leaders empower their team members by delegating tasks and responsibilities, providing them with the necessary resources and support, and trusting them to make decisions and take ownership of their work. They create a positive and inclusive work environment that encourages collaboration and innovation.



Building trust with your team

Define trust



"Most people know trust when they see it, but have no idea why trust exists, where it does, or what happened when trust is lost."



Charles H. Green and Andrea P. Howe

The Trusted Advisor Fieldbook: A Comprehensive Toolkit for Leading with Trust.
John Wiley & Sons, Inc,
2012



Chat: How can you build trust?



How can you build trust?

Think about some ideas on how you can build trust on a team.



Building rapport



What does rapport have to do with communication?

Rapport is a natural dance of language, posture, and movement between people who are bonding.

Cultural differences can often create obstacles in the efforts of building rapport and with effective communication.

Learn about the other person's interests, beliefs and values. Deep rapport develops when you understand each other's feelings and ideas.



The Rapport Pyramid

Personal Disclosure:

"Outside of work, I've started teaching netball to kids in the evenings, which has given me a really different perspective on leadership."

Feeling Sharing:

"I'm actually quite excited about these changes; of course, they bring challenges, but it's rewarding to see the positive impact, especially on our clients."

Opinion Sharing:

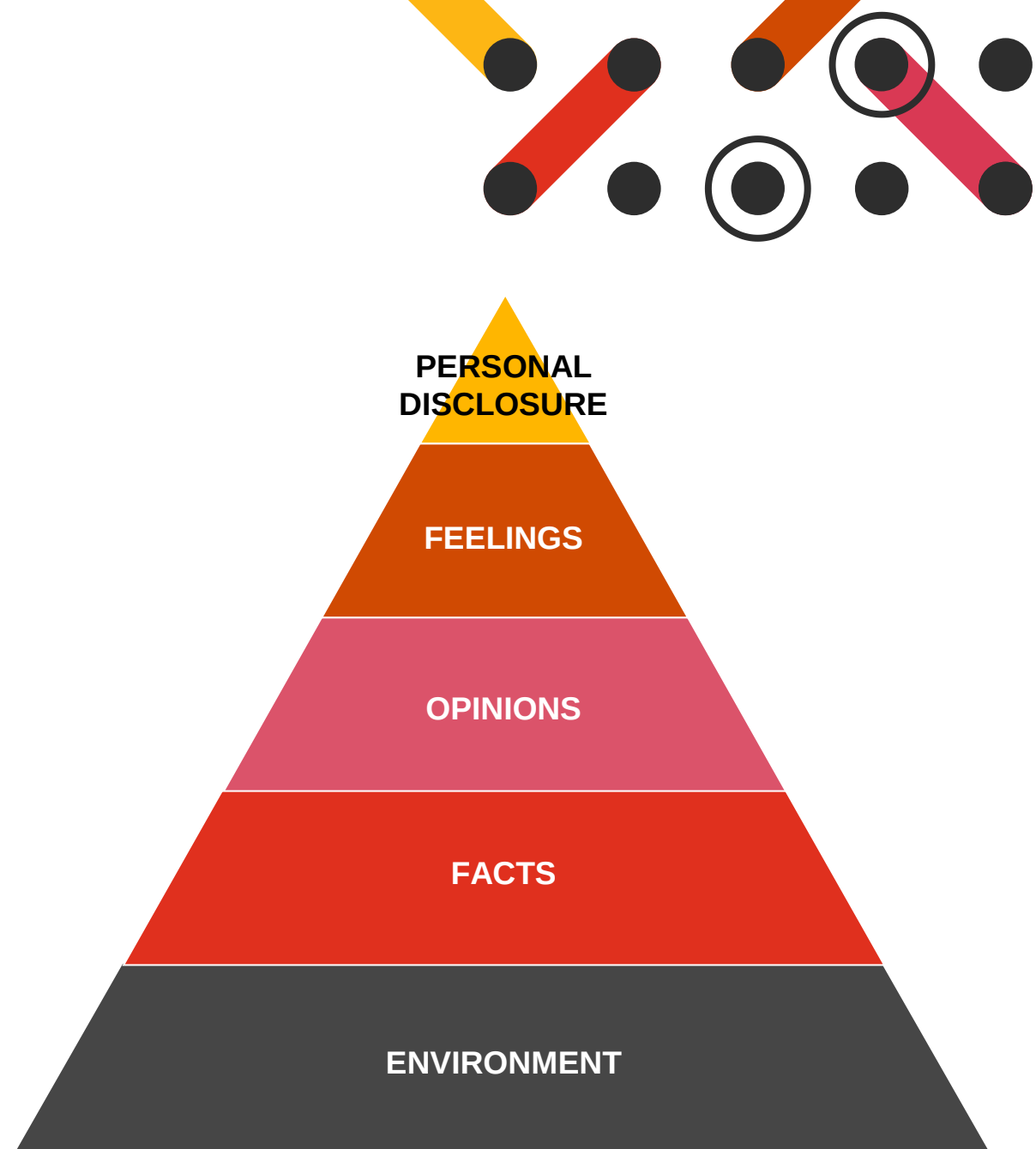
"I've noticed that integrating technology in our workflow has made a big difference. How do you feel about the digital transformations happening at PwC?"

Fact Sharing:

"I've been working with the tax advisory team on some cross-border projects, which has been a really fascinating experience."

Environmental Commenting:

"It's quite a turnout today, isn't it? It's great to see so many faces from different departments."



Trust equation

A model to help improve Trustworthiness

Where:

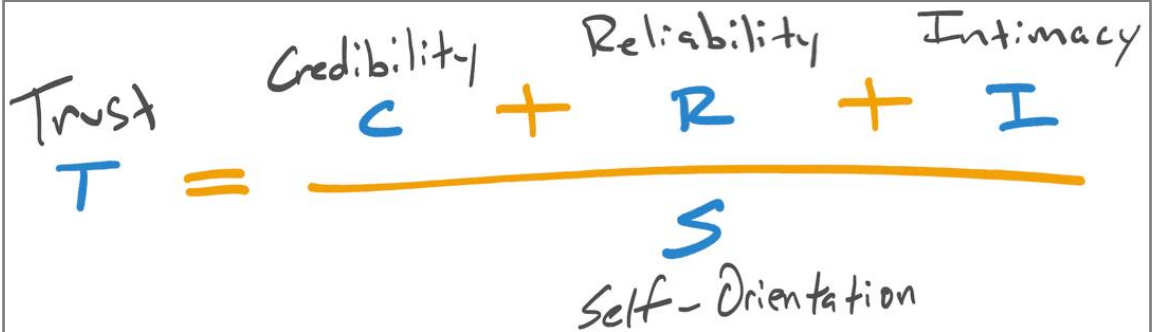
T = Trustworthiness

C = Credibility

R = Reliability

I = Intimacy (Empathy + Transparency)

S = Self-Orientation



A hand-drawn diagram of the Trust Equation. On the left, the word 'Trust' is written in blue, with a blue 'T' below it. This is followed by an equals sign. To the right of the equals sign is a horizontal line. Above the line, the words 'Credibility', 'Reliability', and 'Intimacy' are written in blue. Below the line, the word 'Self-Orientation' is written in blue. The letters 'C', 'R', and 'I' are written in blue below 'Credibility', 'Reliability', and 'Intimacy' respectively. The letter 'S' is written in blue below 'Self-Orientation'. Plus signs are placed between 'Credibility' and 'Reliability', and between 'Reliability' and 'Intimacy'.

$$\text{Trust } T = \frac{\text{Credibility } C + \text{Reliability } R + \text{Intimacy } I}{\text{Self-Orientation } S}$$

Variables	Realm	Example
Credibility	Words	I can trust what he says about...
Reliability	Actions	I can trust her to do...
Intimacy	Emotions	I can feel comfortable discussing...
Self-orientation	Motives	I can trust his motives



Why are these elements important to build on a team?

Maister, David H., Charles H. Green, and Robert M. Galford. The Trusted Advisor. Free Press, 2000 edition.

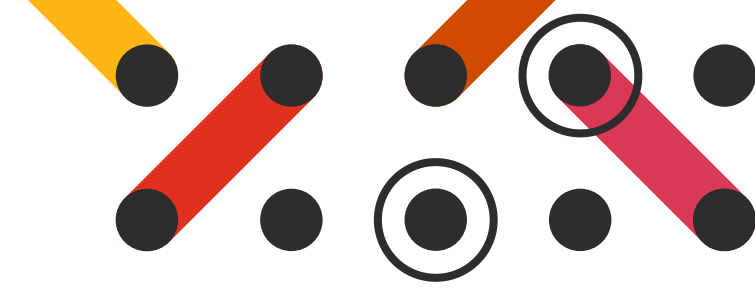
For more information on becoming a trusted advisor, please visit <https://trustedadvisor.com/>.

Breakout Group Roles

- **Group leader**
 - Keeps everyone on task and focused on the activity.
- **Scribe/notetaker**
 - Takes notes of group ideas and is the point person for typing in PwC Live, Zoom, etc.
- **Researcher**
 - Leads any Google or PwC resource search.
- **Timekeeper**
 - Keep team informed about how much time is left in the activity.
- **Presenter**
 - Present materials from their laptop to display for the group.



ACTIVITY: Case Study



Case Study 1: Managing Up with Diverse Working Styles

Scenario: You're leading a project with team members spread across different continents with varying working styles. Your immediate supervisor prefers detailed weekly email updates, but with the fast pace of the project, significant developments occur mid-week that could affect project outcomes.

Task: Develop a strategy to manage your engagement leader's expectations while adapting to the dynamic nature of the project. How do you ensure you're providing timely updates without overwhelming them with information? Consider the principles of managing up and the trust equation in your approach.

Case Study 2: Building Trust in a Cross-Segment Virtual Team

Scenario: A member of your virtual team has missed the last two deadlines, causing delays in the project timeline. This team member is from a different segment of the company and is new to the group. You've noticed the rest of the team's morale is beginning to wane.

Task: Create an action plan to address the missed deadlines, rebuild team morale, and establish trust. Your plan should include leveraging the rapport pyramid to re-engage this team member and ensure that future communications improve the team's overall trust and effectiveness.

DEBRIEF: Case Study 1

Case Study 1: Managing Up with Diverse Working Styles

Scenario: You're leading a project with team members spread across different continents with varying working styles. Your immediate supervisor prefers detailed weekly email updates, but with the fast pace of the project, significant developments occur mid-week that could affect project outcomes.

Task: Develop a strategy to manage your supervisor's expectations while adapting to the dynamic nature of the project. How do you ensure you're providing timely updates without overwhelming them with information? Consider the principles of managing up and the trust equation in your approach.



DEBRIEF: Case Study 2

Case Study 2: Building Trust in a Cross-Segment Virtual Team

Scenario: A member of your virtual team has missed the last two deadlines, causing delays in the project timeline. This team member is from a different segment of the company and is new to the group. You've noticed the rest of the team's morale is beginning to wane.

Task: Create an action plan to address the missed deadlines, rebuild team morale, and establish trust. Your plan should include leveraging the rapport pyramid to re-engage this team member and ensure that future communications improve the team's overall trust and effectiveness.





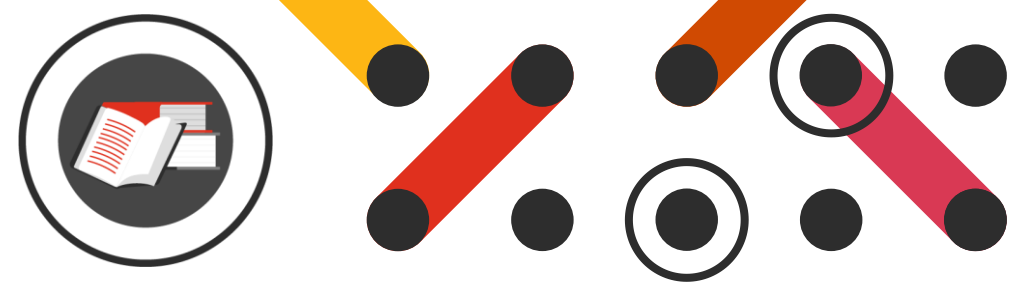
THE SUBTLE ART OF MENTORING

Effective vs Ineffective Mentoring

- How were your mentorship experiences?
- What was effective or ineffective?



Mentoring



Mentoring is about sharing your own path as a blueprint for someone else's journey.

As a mentor, you provide advice, share experiences, and serve as a role model.

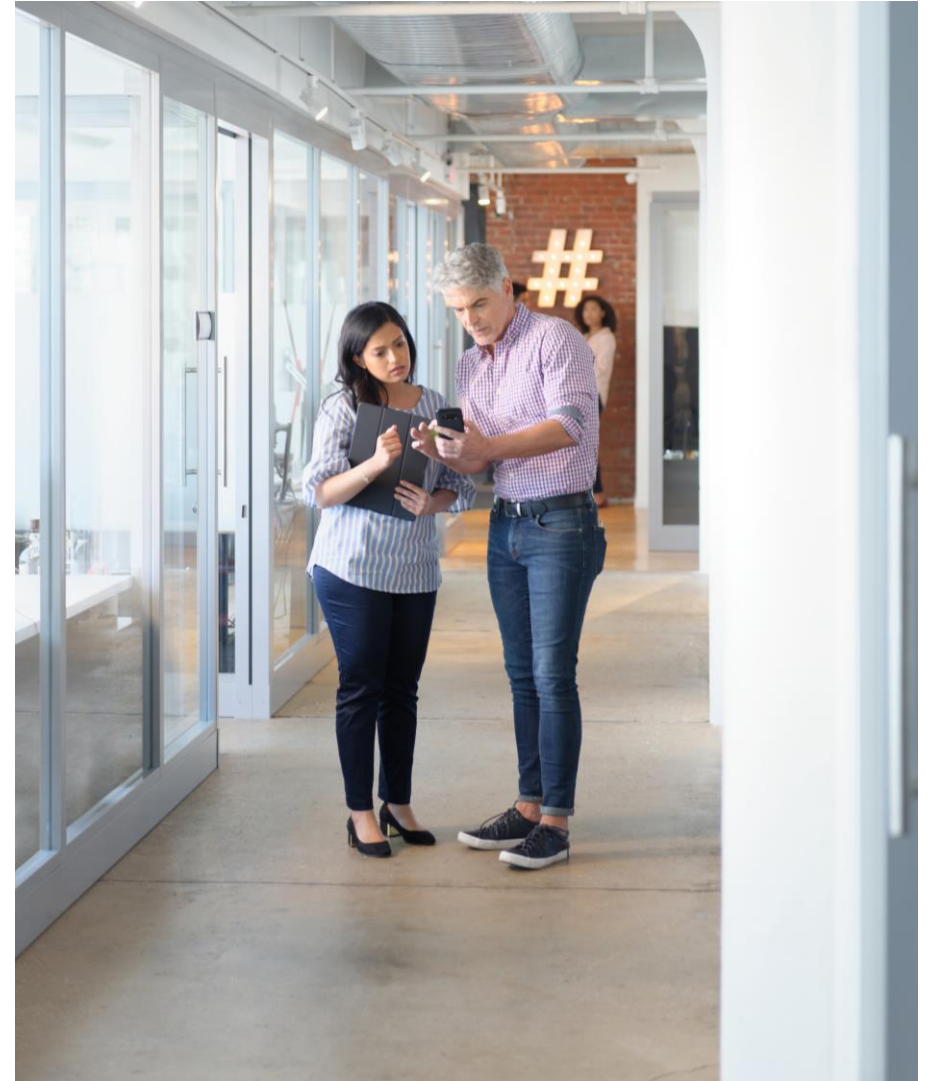
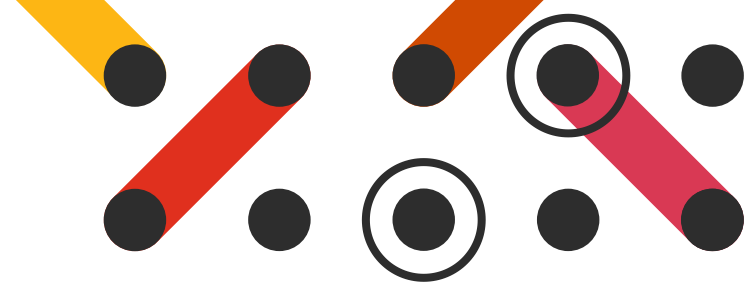
It's a personal relationship, focused on the overall development of the mentee in their career and personal growth.

What are the qualities of an effective mentor?



What are the qualities of an effective mentor?

Answer the question in Poll Everywhere.



GROW

Goal

- Random questions won't help anyone get to the answer!
- Know what you want to teach or share and why.
- Try to have an initial perspective on the goal and use that to guide your questions.

Reality

- Ask mentee to tell you about how they perceive the current situation.
- Ask open-ended questions:
 - What is going on?
 - What do you think that is happening?
 - What do you want to have happen?

ptions
pportunities
bstacles
...to close the gap

- Ask open-ended questions will encourage your mentee to challenge their own thinking
- Think about questions you can ask to help clarify any points or misunderstandings.

Way Forward

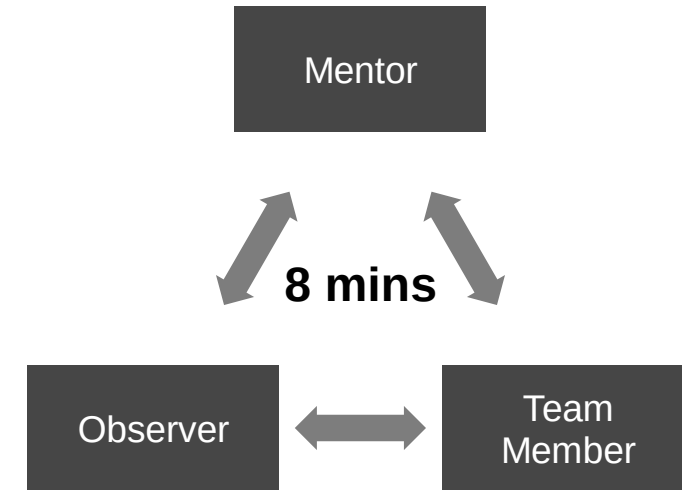
- Before you leave the conversation, make sure you verify understanding and confirm next steps.

Breakout Activity: Real Life Mentoring

Scenario

Sarah, the project leader, noticed that Sanjeev, her new associate, was having some struggles with keeping up with the tracker for their project's tasks. Despite this, Sarah saw great potential in Sanjeev and wanted to help him succeed. She decided to take on the role of a mentor and guide Sanjeev through his challenges.

One day, Sarah sent a chat to Sanjeev and asked if they could have a chat. Sanjeev, feeling a bit nervous, called her on Teams.



1. The **mentor** will guide the team member through the issue, using open-ended questions to foster understanding and self-guidance.
2. The **team member** will respond to the coach-mentor's guidance, articulating their thoughts and proposed actions.
3. The **observers** will provide feedback on the interaction, focusing on how effectively the coach-mentor facilitated the conversation, without giving direct advice or solutions.

Large Group Debrief



Reflection questions

- What was it like to lead/mentor your teammate?
- How can you use these skills on your team?



Skills Playbook

Write one sentence for each strength, weakness, opportunity, and threat related to the knowledge you have acquired and your own self-analysis about the relationship management rotation.

Questions to consider as a tax professional:

1. What strengths do I possess in my relationships on my team?
2. What weaknesses do I possess in my relationships on my team?
3. What opportunities do I have to grow my relationships on my team?
4. What threats possibly challenge my relationships on my team?

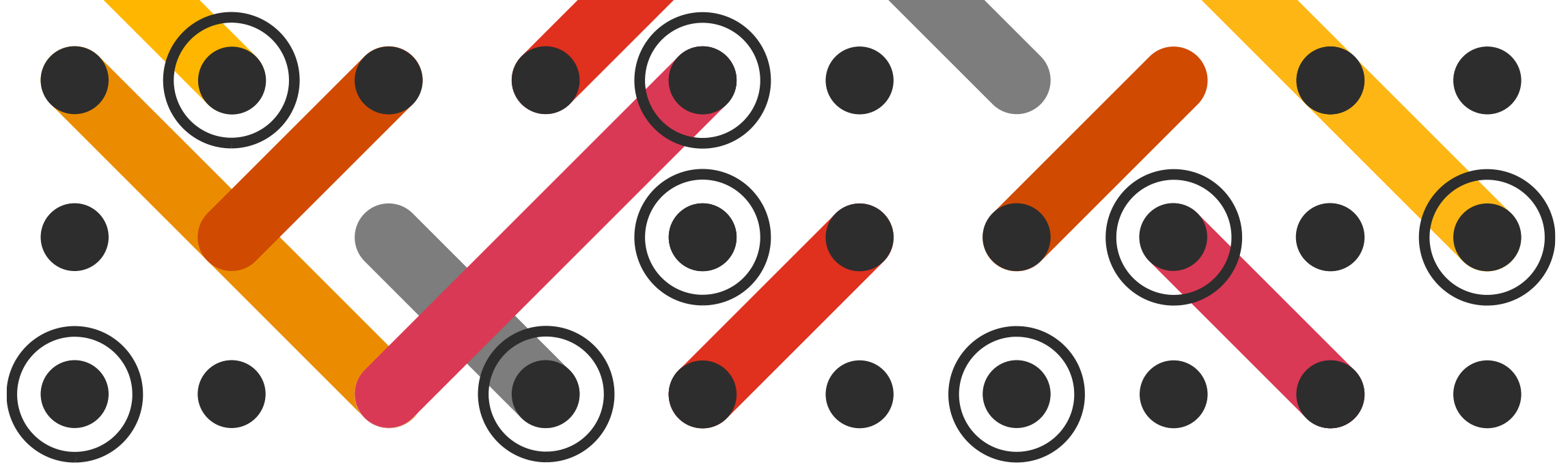
Skills Playbook



Resources

- [Bringing Teaming to Life](#)
- [Leading and Motivating People with Different Personalities Leading Remote Projects and Virtual Teams](#)
- [4 Ways to Manage Deadlines on Cross-Cultural Teams](#)
- [How to Build Trust on your Cross-Cultural Team](#)
- [Working on a Cross-Functional Team](#)





Thank you

WBS Code 80162270001

© 2024 PwC. All rights reserved. PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see www.pwc.com/structure for further details.

