

TaxX Roadmap

The Extra Edge in Your Tax Journey

The Practice Track

(You are interested in building up your tax practice)

Setting Up Your Practice
– Turning A Dream to Reality

Suggested
Courses for
this section

Sustaining the Business
– Geared for Growth

Suggested
Courses for
this section

Expansion/ Succession Planning
– The Next Leap

Suggested
Courses for
this section

The Career Track

(You are interested in excelling in your tax career)

The New Tax Professional on the Block.
Tax Leader of Tomorrow.

Suggested
Courses for
this section

You are gaining Momentum.
Gear Up to climb the Corporate Ladder.

Suggested
Courses for
this section

You Have Reached Management Level!
Congratulations!
It Is A Whole New Ballgame Now.

Suggested
Courses for
this section

Hurray, You Have Reached Top Management!
You have arrived.

Suggested
Courses for
this section

1. Setting Up Your Practice - Turning A Dream to Reality

The entrepreneurial in you have triumphed! You are in the midst of setting up your practice. Then what? How do you turn your dream to a reality?

Choose one of the following that is your immediate priority.

I don't know
where to start

I need to
differentiate
myself

I need to spread
the word that I
have started a
practice

Setting Up Your Practice – The Makings of Reality

Putting Thoughts to Pixels and Ink...

a. Which companies do you admire and what aspects do you admire about them?

1.

2.

3.

b. What did you like or not like of your past working experiences?

1.

2.

3.

Setting Up Your Practice – The Makings of Reality

Putting Thoughts to Pixels and Ink...

c. What personal values and working style would like to implement in your practice?

1.

2.

3.

Putting it all together, describe your dream practice in terms of how you would envisage the team working together, interactions with clients, key processes and guidelines you would like to put in place.

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Setting Up Your Practice – Turning A Dream into Reality

Setting The Practice Apart From Others

a. What might be the plus points potential employees would be attracted to join your team?

1.

2.

3.

b. Name some of the clients you like to have and what do know about them?

1.

2.

3.

4.

5.

Setting Up Your Practice – Turning A Dream into Reality

Setting The Practice Apart From Others

c. How do you envisage your interactions to be like with your clients? (e.g. frequency of meetings, types of information/ work that may be communicated, channels of communication etc)

Putting it all together, what three words would you want your clients to use to describe your practice and what are the three words you would describe your practice to potential employees.

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Setting Up Your Practice – Trumpeting Out Loud

Creating Awareness of Your Practice

a. What platforms (online or offline) would you be using to reach out to potential clients?
(e.g. LinkedIn? Emails? Calls? Through friends and contacts)

1.

2.

3.

Setting Up Your Practice – Trumpeting Out Loud

Creating Awareness of Your Practice

b. Below are some of the different marketing channels companies typically use. From (a), what are the top 3 priority marketing tools you need to reach out to potential clients? I need a/ an:

1- or 2- page factsheet

Advertisement on relevant publications, websites or other online platforms

Company brochure

Corporate gift to leave behind when I visit potential clients

Impactful email that would hopefully generate response

Website

Organise an event to share my expertise to potential clients & introduce my practice's services

Facebook presence

LinkedIn presence

Succinct under 30-second introduction of my practice that will impress potential clients(aka elevator pitch)

Others:

Setting Up Your Practice – Trumpeting Out Loud

Creating Awareness of Your Practice

Putting it all together, what are your top 3 to-dos you need to create a presence for your practice:

1.

2.

3.

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2. Sustaining the Business – Geared for Growth

Your practice has successfully lifted off!
Now, you need to stabilise, sustain the business and gear it up for growth.

Choose one of the following that is your immediate priority.

I need to
retain good
staff

I want to build up
my presence with
my clients and be
their trusted
advisor

I need to
bring in
more
business

2. Sustaining the Practice – Building & Retaining A Go-To Team

Building the go-to 'A' team your clients depend on.

a. When you started your practice and had some idea of what the work culture would be like, what did you envisage your staff to be like?

1.

2.

3.

b. What are the positive traits of your current team that you would like to build upon and traits you would like to eradicate or improve upon?

1.

2.

3.

1.

2.

3.

2. Sustaining the Practice – Building & Retaining A Go-To Team

Building the go-to 'A' team your clients depend on.

c. What are your clients' comments on your team?

1.

2.

3.

Putting it all together, pen your thoughts on the top 3 to-dos to harness on the strengths and improve on other areas to retain talent and better serve your clients.

Don't forget to share thoughts with your team too so that all are aligned!

1.

2.

3.

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2. Sustaining the Practice – Be the Go-To for My Clients

Building up my practice's presence in the eyes of clients where they can depend on.

a. What are you doing to keep your client relationships going?

1.

2.

3.

b. What are other practices doing to keep their client relationships strong?

1.

2.

3.

2. Sustaining the Practice – Be the Go-To for My Clients

Building up my practice's presence in the eyes of clients where they can depend on.

c. What would it take for your clients to see you as their trusted advisor? What do you think they want or would like from you/your team?

1.

1.

2.

2.

3.

3.

Putting it all together, pen your thoughts on the top 3 to-dos to enhance your client relationships (e.g. specific personal skills to develop upon, enhance or change existing channels, modes and frequency of communication, specific actions or skills you might want your team to reflect in their interactions with clients etc.)

1.

2.

3.

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2. Sustaining the Practice – Be the Go-To for my clients

Building up my practice's portfolio of clientele.

a. What is the profile of your current clients? Are you particularly strong in any area of focus? (e.g. tax type, industry, etc.)

bi. Where (e.g. sectors, types of business) do you see demand is?

1.

2.

3.

bii. Where do you think you can meet potential clients?

1.

2.

3.

2. Sustaining the Practice – Be the Go-To for my clients

Building up my practice's portfolio of clientele.

ci. Are there any personal development areas you feel you need to improve on to build up your practice's portfolio of clientele?

1.

2.

3.

4.

5.

cii. Looking at the marketing tools you are currently using, do you think any change is needed?

1.

2.

3.

4.

5.

2. Sustaining the Practice – Be the Go-To for my clients

Building up my practice's portfolio of clientele.

Putting it all together, what are the top 3 to-dos to build up your practice's portfolio of clientele?

1.

2.

3.

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3. Expansion/Succession Planning – The Next Leap

It has not been easy but what a journey it has been! Congratulations! Now, it is time to think of the next leap.

Choose one of the following that is your immediate priority.

I want to transform my business and position it for accelerated growth

I want to start looking at succession planning

3. Expansion/Succession Planning – The Leap Ahead

Positioning my leap ahead.

a. Taking stock of the current portfolio of clients, these are the aspects I am proud of and aspects I wish were not as such:

b. Taking stock of my current team(including myself), these are our strengths & weakness:

Strengths:

Weaknesses:

3. Expansion/Succession Planning – The Leap Ahead

Positioning my leap ahead.

ci. Taking stock of my current practice management, the key processes & initiatives that have worked well & area(s) that could be improved upon are:

1.

1.

2.

2.

3.

3.

3. Expansion/Succession Planning – The Leap Ahead

Positioning my leap ahead.

cii. Taking stock of my current marketing activities and modes of communication with my clients and team, channels that have worked well and channels that were not as effective are:

1.

2.

3.

3. Expansion/Succession Planning – The Leap Ahead

Positioning my leap ahead.

Putting it all together, what are the top 3 to-dos to make that leap forward?

1.

2.

3.

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3. Expansion/Succession Planning – The Leap Ahead

The Big Leap into the Next Era.

a. What is working well in your practice that you feel must continue to exist?

b. What are the areas of expertise and/ or traits you feel the team or your successor should possess amidst the evolving business and tax landscapes for the practice to thrive for many years to come:

3. Expansion/Succession Planning – The Leap Ahead

The Big Leap into the Next Era.

ci. I would like to see my team developing their skills in these areas to be poised for the next era:

1.

1.

2.

2.

3.

3.

3. Expansion/Succession Planning – The Leap Ahead

The Big Leap into the Next Era.

cii. These are the marketing activities the practice may consider for tapping into for the next era:

1.

1.

2.

2.

3.

3.

3. Expansion/Succession Planning – The Leap Ahead

The Big Leap into the Next Era.

Putting it all together, what are the top 5 to-dos for succession planning to be a smooth and effective one?

1.

2.

3.

4.

5.

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1. The New Tax Professional on the Block. The Tax Leader of Tomorrow.

You support your reporting officer and/or tax team in delivering high quality tax services.

In a consultancy setup: You undertake tax assignments such as preparing tax computation schedules and various statutory filings in a timely manner. You work closely with the tax team and collaborate with others such as the advisory or audit teams to innovate and identify value-adding opportunities to the client. You also contribute to the tax engagement by assisting in resolving queries on tax issues from clients or the tax authority. You may also contribute by researching and drafting possible recommendations on local, regional and/or international tax matters.

In a commercial setup: You undertake tax assignments such as preparing tax computation or assisting in the liaison between internal stakeholders and external tax agents in the preparation tax computation, preparing tax schedules and various statutory filings in a timely manner as well as assisting in resolving inquiries from the tax authority. You may also be involved in cross-functional and/or cross-border teams to assist and/or research on tax-related issues, which may include one or more tax types, such as corporate, individual, and goods and services tax.

Choose one of the following issues that best relates to your situation which you are interested in resolving.

I can't cope!
There is too much
work!

I wish I can
communicate
better with my
colleagues and/
or clients.

I have a difficult
client to support.

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2. You are starting to gain momentum. Gear up to climb the corporate ladder.

You support your reporting officer in managing simple tax engagements and delivering high quality tax services. You contribute to the achievement of quality tax work through the development and use of tax technical skills and business knowledge to resolve work issues effectively.

In a consultancy setup: You plan, perform and review straightforward tax compliance work. You work on tax deliverables and ensure the timely completion of tax work. You work closely with clients and nurtures on-going relationships with them. You assist in preparing tax returns for larger and/or complex entities, managing all tax compliance, preparing transfer pricing documentation, resolving queries on tax issues from clients or the tax authority and possibly tax dispute resolution.

In a commercial setup: You are involved in compliance on tax reporting, implementation of tax policies and the adherence of internal tax controls. You prepare tax returns, including data collation and analysis, manage all tax compliance work, monitor tax payment and refunds, prepare transfer pricing documentation, prepare tax reports, and assist in resolving inquiries from the tax authority and tax dispute resolution.

Choose one of the following that you are interested in enhancing yourself on.

I need the team
to work more
effectively.

I want to
sharpen my
communication
skills.

I want to hone
my leadership
skills

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3. You have reached management level! Congratulations!

It is a whole new ballgame now.

You provide operational management support and is the go-to person for a portfolio of top tier clients to deliver high quality tax services. Within an organisation, you provide leadership to your tax team to deliver high quality tax services for internal stakeholders and manages tax projects within his portfolio. You also drive the performance and development of team capabilities through active coaching and mentoring to achieve effective and efficient team performance.

In a consultancy setup: You review and provide key technical expertise and operational leadership to ensure the performance and quality of all tax work. You value-add to the organisation by developing tax solutions and are involved in a broad range of projects to achieve tax efficiency, as well as foster a culture of learning and professionalism within the team.

You develop and maintain long-term client relationships and value-add to the organisation by proactively identifying new business development opportunities and are responsible for the development and marketing of new products and service offerings. You ensure operational and financial excellence by determining and monitoring the budget, timeliness and resources for the tax projects in your portfolio. Beyond overseeing the operation of various tax teams to ensure deliverables within the allotted budget and timeline, you may also manage cross-functional and cross-border projects.

In a commercial setup: You are a go-to operational person on all tax matters for the business units, external tax agents and the tax authority. You value-add to the organisation by proactively deepening your technical knowledge and keeping abreast of tax regulations to ensure all tax obligations of entities/regions under your portfolio are met.

You also provide key technical expertise and leadership to ensure that the tax function provides high quality tax deliverables and that your team operates in line with the organisation's overall tax strategy. He may also be involved in local or international projects such as developing a regional tax framework or proposing updated tax governance and controls.

Choose one of the following that you can best relate to.

I am a new manager!

I need to manage the team & myself more effectively.

I need to be better at business development

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4. Hurray, you have reached top management! You have arrived.

You are a strategic leader who steers the tax line of business or organisation to achieve excellence in the local, regional and/or international arena. You formulate technical or strategic directions to drive change and harness the potential from change.

In a consultancy setup: You provide the vision and overarching leadership to develop and strengthen organisational tax capabilities. You are responsible for the overall tax engagement and its performance. He champions the development of the team against business goals and objectives.

You also manage a portfolio of top tier clients and are the advisory lead in all local, regional and international tax planning and structuring which may include transfer pricing, and mergers and acquisition matters. You manage a team of professionals, work with other partners on tax engagements and proactively keep abreast of tax regulations. You drive the development of innovative ideas to extend client services, provide support to ensure timely completion of tax projects, address client concerns for immediate resolution, and maintain up-to date knowledge about company standards, policies and regulations.

In a commercial setup: You are responsible for the overall tax function of the organisation and its performance within your jurisdiction. You provide strategic tax leadership to develop and strengthen the organisation's tax position and proactively keeps abreast of tax regulations.

You lead a team of tax professionals to make strategic tax decisions for the organisation such as developing and overseeing the implementation of tax strategy and managing its government incentives and filings. You also ensure that the organisation meets all its tax obligations, operates in line with the organisation's global tax strategies and may represent and advocate for the company in its tax matters with the tax authorities. Internally, you provide strategic tax guidance pertaining to new business developments.

Choose one of the following that best describes your immediate priority.

I need to
develop more
win-win
communication
skills

I need to hone
my business
development
skills.

I need to gear
up my team for
greater things.

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