

New Owner Candidate Self-Assessment

CANDIDATE INSTRUCTIONS

- Download a copy of this recommendation form to your personal files, include your name in the file name: *New Owner_Self Assessment_ **LAST NAME_FIRST NAME**.pdf*
- Complete the form in its entirety and review it with your sponsor.
- By July 15**, upload this file to the secure new owner selection document upload app that's accessible from [the new owner selection process site](#).

Candidate Name:		Date:	
Line of Business:		Region:	
Industry and/or technical specialization:		Location:	
Starting year with firm: (for candidates from merged firms, provide start date with merged firm)		Year promoted to senior manager or director:	
Years in profession:		Active CPA in Principal Place of Business?	

Directions: Complete the questions by providing specific examples of your strengths and contributions to the practice in each of the six categories corresponding to the applicable [New Owner Sketch](#). **Conciseness counts. Limit responses to 500 words each.**

1. SUMMARY STATEMENT: Provide a brief, compelling statement describing how you, as an owner, will drive firm strategy and make a difference (locally, regionally, nationally and/or internationally) to the future of RSM.

2. RSM EXPERIENCE - CLIENT. Actively serves clients as a first-choice advisor by providing timely, responsive services that exceed expectations.

2a) Provide two recent examples illustrating how you have actively demonstrated the [our firm values](#) and the [first-choice advisor characteristics \(5 C's\)](#) in an effort to support the firm in its vision of being the first-choice advisor to middle-market leaders globally.

2b) Provide an example of a time you realized your approach to working with a client wasn't ideal. Which of the 5 C's did you demonstrate to rectify the situation?

3. QUALITY & EXPERTISE. Manages risk and delivers services that consistently meet standards of stakeholders (clients, firm, reviewers, regulators, engagement leads and team).

3a) Your quality will be thoroughly vetted by the National Office of Risk Management (NORM) and your sponsor/regional LOB leader will provide commentary, which may be reviewed by regulatory bodies. If you have noteworthy information to add regarding your quality, please do so here.

3b) Where have you developed prominence in response to shifting marketplace demands? How have you stretched your expertise beyond your line of business?

3c) How have you leveraged all facets of your expertise, in combination with your critical thinking skills, to: a) assist clients and b) contribute to others within the firm (e.g., launch/proposal teams, taskforces, rotations, training, thought leadership, etc.)?

4. RSM EXPERIENCE - TALENT. Delivers the RSM experience by attracting, developing & retaining team members. Builds collaborative, innovative client service teams to regardless of location, LOB, or industry in an inclusive, purpose-driven, performance-focused and values-based manner in alignment with our vision and strategy.

RECRUITING (AND RE-RECRUITING)

4a) What has been your greatest contribution to recruiting and/or retaining high-potential talent in the last year or two? How have you supported other teams in building their talent pipelines?

DEVELOPING AND REWARDING TALENT

4b) Provide two recent examples illustrating how you have actively demonstrated the 5 C's in an effort to coach and/or develop talent (with reference to specific individuals) both within and outside your immediate team/reporting structure.

CULTURE, DIVERSITY & INCLUSION

4c) What have you done to reduce barriers and improve representation in the hiring, development and promotion of a diverse workforce?

4d) *Provide an example of a time you made a difference or learned something valuable about yourself via one of our Employee Network Groups (ENGs).*

ENTERPRISE LEADERSHIP

4e) In what ways have you been collaborative and contributed to enterprise efforts across the firm?

4f) *Share an example of enterprise leadership where a decision you made or action you took benefited the firm, even if it did not directly benefit you or your team?*

4g) Drawing from your experience leading others (in a team, the firm, the profession, or the community), describe a situation you encountered that ended up teaching you something noteworthy about yourself.

5. FINANCIAL EXCELLENCE. Delivers client services that ensure sustainable profitable results as a Relationship / Functional / Project Lead OR Practice Leader

5a) *Provide an example of how you plan and manage your engagements/projects for profitability.*

6. GROWTH. Demonstrates ability to grow business by initiating or participating as a team member in a meaningful way on new business to strategically-aligned existing and new clients

6a) Provide examples of specific growth behaviors, actions and methodologies you have demonstrated to build RSM promoters, attract new clients, extend service opportunities and build marketplace recognition.

7. OTHER INPUT

Provide any additional input that you think is relevant to your candidacy.