



SOCIETY OF ACTUARIES

Article from:

The Stepping Stone

April 2001 – Issue No. 6

Quality Measures - December 2000

In the Office and on the Floor - Similarities Between Refereeing and Consulting

by Nickolas J. Ortner, ASA, MAAA

One of my avocations is refereeing basketball, and I currently referee varsity high school basketball games in the greater Milwaukee area. While thinking about my experiences on the basketball floor, I've noticed a number of similarities between that world and the consulting world.



include sprinting around the office on occasion!).

Other examples could include returning phone calls immediately or meeting timelines or deadlines ahead of schedule (if possible). You may also score a slam-dunk by simply copying a pertinent arti-

cle you read and forwarding it on to the client.

First Impressions Matter

Coaches form opinions from the minute referees walk onto the floor. Coaches make immediate judgments from the moment they see and meet me, even before the game starts. Coaches question:

- Is the referee in good physical shape?
- Does the referee look professional? Are his shoes shined, his uniform clean and pressed?
- What is his attitude and demeanor? Does he want to be here?

Clients and prospective clients form comparable immediate judgments, based on similar questions:

- What are the consultant's qualifications and credentials?
- How does the consultant present him/herself?
- Does the consultant listen and seem really interested in helping me?
- Is the request for proposal (RFP) clearly presented, on time and in line with any specific directions?

A good first impression (whether in person, on the phone, or on paper) can go a long way toward establishing immediate credibility with a client or prospective client.

Hustle is Important

From the opening tip of a basketball game, nothing bothers a coach more than a referee who fails to hustle. Rule knowledge and application are certainly important, but not hustling up and down the floor is simply inexcusable and weighs heavily in coaches' minds.

As a consultant, "hustle" means doing everything you reasonably can to answer important questions or complete projects as diligently as possible (which may

The Importance of Ongoing Communication and Rapport

During the course of a game, there are certain instances where a coach or player requires the referee's feedback. Coaches may need clarification on why a particular call was (or wasn't) made, or players may ask for the referee to pay attention to something happening on the floor. Good referees maintain a rapport with coaches and players to maintain credibility and to promptly address issues that may arise.

Managing client relationships and maintaining satisfied clients is often dependent on having that same rapport. At times, clients simply need someone to listen to their issues. Other times, clients want their consultant to be available to answer emerging questions and to resolve issues promptly and effectively.

Sell the Tough Call

At times during a game, a referee has to make a tough call that some people are not going to like. In order to demonstrate confidence in that call and to minimize any potential criticism, that call must be made with a stronger-than-usual whistle and confident accompanying signal. In other words, the referee must "sell the call" in order to help convince others that the call made was the right one.

Clients may ask tough questions, occasionally demanding answers they do not necessarily want to hear. If faced with such questions, the consultant must also

"sell the call." Answer the question asked directly and clearly, using as strong a language as necessary. Support that answer with reasoned thought and relevant analysis and exhibits to minimize the resistance and criticism that may result from the answer provided.

Trust Your Partner(s)

One basketball referee is not enough to properly cover the entire floor; two-person or three-person crews (depending on the level of play) are assigned to all high school basketball games. A referee must take care of his own responsibilities while trusting that his partners will take care of theirs.

The consultant must, to some extent, trust his or her partners in a project. In the office, various responsibilities must be entrusted and/or delegated to others. When working with clients, you may need to rely on their data, information, and/or expertise for certain project responsibilities.

Some People are Never Satisfied

Despite my best efforts as a basketball referee, certain coaches, players, and fans simply will not accept my rulings or respect the job I do. While I work just as hard in the face of resistance, recognizing this "fact of life" allows me to move ahead with the game and gives me the peace of mind of knowing I am doing my best.

Despite our best efforts, there will be certain clients, like some coaches, players, and fans, for whom we can never seem to do or know enough. Keep in mind it is only one project or one client. Maintain your perspective and never take it personally. If anything, use such a situation as a learning experience and move ahead from there.

Nickolas J. Ortner, ASA, MAAA, is an Associate Actuary at Milliman & Robertson, Inc. in Brookfield, WI. He can be reached at nick.ortner@milliman.com.