



SOCIETY OF ACTUARIES

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What Would You Do?

Responses to “The Center of Power”

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In February’s issue of *The Stepping Stone*, I posed the question “*What would you do?*” to the product situation below. Here are your responses, and the real-life conclusion of the situation. I have lightly edited the responses for clarity and space. Send your own ideas for situations to pose in upcoming issues to SteppingStone@JHACareers.com.

THE CENTER OF POWER

Gilbert has really enjoyed his tenure at Competitive Life, building up an actuarial department. Competitive has recently completed a change of ownership, from a local parent to one in another state. While the prior owner operated in completely different lines, the new owner has a great deal of experience in many of Competitive’s product lines, particularly those with which Gilbert is most involved, Gilbert would like to tap into that expertise. He also feels that even though Competitive has always been treated as an autonomous entity, the real center of power is the new home office, and for his own career growth it is important that he get well-connected there.

Gilbert has made a point of getting to know people who have come down to visit from the home office, and would like to visit there himself. However, his boss (the chief actuary), the CEO and other senior officers want to continue to run Competitive Life very independently, are very concerned about letting “the elephant get his nose in the tent.” Initiatives that are “pushed down” from the home office are suspect. So far, any suggestion Gilbert has made to visit the home office has been rebuffed by his boss, whose attitude is “Who would want to go there?”

WHAT WOULD YOU DO?

Several respondents agreed that Gilbert was wise to think about connecting to the home office:

“I agree with Gilbert’s view that he has much to gain from contact with the new parent, both from just having the contacts, and professionally due to their experience and resources in his area.

“In the short term, he should be able to find ways to contact colleagues at the new parent for technical issues and resources without threatening his boss. With a little more work, he may find a way on to a bigger project at the new parent. After a bit more time, I expect that the new parent will be more involved with Competitive, so the CEO and other officers will find their autonomy harder to keep (and may be retiring).”

“I would have another conversation with my boss, and be prepared to outline the business reasons for my home office visit, as well as my desire to gain the additional product knowledge. I would point out how this sort of a visit and gaining knowledge could be beneficial to the business. I would set the tone of the meeting to be direct, that I was clearly asking to make the visit, versus just throwing it out as a suggestion. If my meeting were unsuccessful, I would find other ways to network with people in the home office. There are many other ways to connect with people besides visiting the office in person.”

Some respondents advocated patience:

“Gilbert needs to practice patience. The case said that they recently completed a change of ownership. It takes time for trust to build. The others are probably respecting current management as a way of building trust, even if they have longer term plans in place. Building relationships where he can, being patient, respecting the layers of management above him—this should all pay off in the long term.”

“I’d tread very carefully. It’s rarely a good idea to go over your boss’s head. I’d continue to build strong relationships with the people who come from the home office. Then, I’d run my business ideas through those people and let them know about my expertise and interest. If they like my ideas, they may go back and pitch them to the right people at the home office. If things go well there, perhaps I’d get an official invite from the home office to visit them or to work on projects that fit my expertise and interest.”

“I would see going through my boss to get a home office visit is a dead-end. However, in the age of LinkedIn, email, etc., I would still try to network and stay in touch with the people I have met at the home office. Sharing ideas, asking questions, etc., would keep my name out there in case an opportunity arose. I also would likely keep an eye out for any job opportunities that may be appealing at the home office if I felt that really was the place I wanted to be. If that’s not in the cards, perhaps one final mention to the boss that if an opportunity should arise where someone needs to go to the home office, I would like to be considered.”

One felt Gilbert needed to put less emphasis on his own career:

“Gilbert needs to change focus. Rather than concentrating on his own ambitions, he might do well to focus more on the interests of Competitive and its new owner. Rather than pushing for a visit to the new parent office, emphasize the benefits of open communication with people there.

“With respect to the elephant:

1. The elephant now owns the tent and will want information about what’s happening inside.
2. If Competitive doesn’t take a lead in fostering open communication, they can expect the elephant to come sniffing.

“Avoiding communication with the parent might save some hassles in the near term, but likely at the expense of bigger hassles further down the road, after the parent realizes how secretive Competitive is behaving.”

Another gave a potential roadmap for Gilbert to follow:

“Gilbert is wise to think more globally than his own company, because new perspective is always valuable, especially after working in the same company for several years. Meeting in person is nice, but not essential with current technology—he still can build relationships via phone calls or video conference with his peers in the home office, to review actuarial work and generally present Competitive favorably. Gilbert could frame these meetings to the Competitive leadership as ‘understanding the home office’s expectations,’

‘making sure they have confidence in us,’ and ‘gathering intelligence on how things work,’ which is certainly accurate and beneficial to Competitive too.

“Gilbert should remain very professional and business-focused in these conversations, so that he can’t be accused of going around his current bosses, focusing on showing that Competitive is successful, while also being open to ideas from the home office. Gilbert also could make plans for in-person conversations with home office colleagues at professional events such as Society of Actuaries (SOA) meetings.

“The home office likely will welcome having Gilbert’s better understanding of Competitive Life’s history and culture, to help them work with Competitive more successfully. Over time, either senior leaders will gain comfort with each other, or changes will occur. Building those relationships will help Gilbert if changes are made in reporting structure, since he has proven his value, and more generally for building his professional network for future career development.”

Another suggested strategies to make a visit a reality, and other options to consider:

“Gilbert may want to further investigate upcoming conferences or training sessions in the vicinity of the home office, such as an SOA conference, local actuarial club meeting, external vendor symposium, or a human resources-related developmental class

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he could attend. He could then stop by the home office since he is in such close proximity. Gilbert’s boss may be more understanding of Gilbert visiting the home office if there are additional reasons for Gilbert to be in town.

“If that is not feasible, and Gilbert’s manager continues to not be supportive of visits to the home office, Gilbert could become better known there by reaching out to individuals via phone, conference calls, or videoconference. As technology has progressed significantly, there are many ways that Gilbert could further develop his relationships without being physically present in the home office. Particularly as Gilbert is involved in the same product lines as the home office, it would make sense for him to reach out to other actuaries and co-workers to expand his network and discuss business-related topics.

“Depending on the direction of Gilbert’s future at Competitive, it could even make sense for Gilbert to consider rotations or employment opportunities in the home office. Gilbert may want to leave the satellite office and transition to a new role in the home office—particularly if the expertise associated with the product line that Gilbert works with resides there.”

Finally, this respondent closely examined the psychology of the situation:

“The chief actuary and senior executives are exhibiting a classic case of positional leadership. They seem to be more concerned about what they know, the power they hold, and not giving an inch away. Thus, every home office initiative sounds like it is ‘pushed down’ and is suspect. There’s also a sense of ‘the way we have always done it’ mentality. The idea of ‘maintaining autonomy’ is just the cover-up.

“Gilbert is behaving like a leader should: looking to always learn and expose himself to different perspectives. There doesn’t seem to be any intention to become the golden child, take over the company, or disrupt the autonomy of Competitive Life.

“First, I would recognize the Law of the Lid: leadership ability determines a person’s level of effectiveness. I have to accept that the senior

executive mentality and leadership style are going to be a barrier to my personal growth. I also have to recognize the same folks can directly affect my job situation.

“Second, I must implement the Law of Connection: leaders touch a heart before they ask for a hand.

“Instead of selling the request as an opportunity for me, I would first find out the root cause for the resistance to my home office visit, and I would also figure out how each of the senior executives keeps score. I would then be able to craft a request that appeals to each person’s way of thinking, their passions, and what they can gain from me visiting the home office.

“Third, if this approach doesn’t work, it’s very likely that I would look for other ways to connect with these folks at the home office in order to learn from their practices or look for a different role at the home office altogether.

“People join companies but they leave people. Learners always find a way to keep learning, and sometimes that means changing the people we work with.”

Thanks to everyone who contributed!

WHAT REALLY HAPPENED?

Gilbert worked on getting to know a number of people in the home office, making sure to always be seen as helpful. Before long, he found out about an interesting cross-functional initiative that lacked any representation by Competitive, and proposed to his boss and the CEO that he take that on. While they weren’t overly excited about the initiative, they were under pressure to show more support to home office ventures, and agreed that his representation would be politically helpful. Gilbert enjoyed the project, was able to travel to the home office for quarterly meetings, and extend those for other meetings each time. Before long, he had a number of strong connections there, and found other ways to get more involved with the home office.

A few years later, Competitive Life was merged into the parent and largely shut down. Gilbert was one of only two or three people in the company offered a role at the parent. ●