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Go Beyond Your to-dos: Create a “to-who” List

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Many of us write down a to-do list to plan our day at work and to manage our projects, but we often don't give that same attention or time to connect with our co-workers, friends or even family. Creating a to-who list instead can give us the motivation, and hold us accountable, to fill this void.

WHAT IS A TO-WHO LIST?

A to-who list contains the names of people you want to connect with. It can be a colleague with whom you haven't touched based in a long time, a mentor you've been meaning to call, a friend who can give you that much-needed emotional boost, or a family member you haven't visited for a while. Keynote speaker and author Gary Bradt presented this useful technique at an Actuarial Community Town Hall at Prudential this spring. In a recent article on the *Forbes* website, Bradt explained this concept:

Use a “ToWho” [sic] list to build your change network. ... It is a tool akin to the to-do list. But rather than a list of daily activities, the ToWho list is a list of all the people you want to stay in contact with. ... Successful leaders review and add to their ToWho list regularly, and encourage others to do the same. Reaching out to somebody on one's list is a great way to sustain the relationships that will sustain one most, both personally and professionally, whenever change hits.¹

THE TO-WHO CHALLENGE

For some of us, myself included, networking can be a challenge. I can tell you that in my experience, it often doesn't come naturally. For those of us who are introverts, it can be especially difficult.

To encourage the actuarial community at Prudential to collaborate and engage, a to-who challenge was introduced following Bradt's presentation. The employee with the most networking conversations completed within a three-month period would receive a personal one-on-one coaching session with Bradt.

Two years ago, I relocated from New Jersey to Virginia. I took a position in which I now work from home rather than working out of our headquarters in Newark. In my new role, my department is based outside of Philadelphia, in Fort Washington, Pennsylvania. Even though I knew that working from home would be a challenge, I felt my strengths were in the relationships that I had built over the years. I quickly realized that it was challenging to stay connected with my co-workers, even though I had worked on-site for the company for several years.

When I heard about the to-who challenge, I was excited because I enjoy connecting with people on a personal level and learning about their experiences, and knew I had a head start. Since taking on the new role, I had kept in touch with my co-workers through phone calls, emails and instant messaging. I also made visits to our Newark and Fort Washington offices every other month so I could make in-person connections. Prior to a visit, I would pre-plan and write a list of people to connect with, and I contacted them in advance to see if they were free for breakfast, lunch or coffee. Surprisingly, I found out that most were happy to meet. For each trip, my goal became to fill up my calendar and book time with those with whom I wanted to connect.

What I had not been doing, however, was keeping track of the people with whom I planned to, or wanted to meet with on a frequent basis. The challenge encouraged me to keep better track of my contacts, which helped guide me in recording touch points, so there was not a huge time gap between correspondences. The to-who challenge pushed me to meet someone new on every trip, in addition to connecting with people I already knew. If I have just two days, I told myself, I need to make the most of it—and that's how I won the to-who challenge!

Winning the challenge was invaluable to me because I found Gary to be one of the most engaging speakers I have ever met. During my coaching session, I learned that setting expectations before a meeting can help to level set, and it can help focus on the important points. Touch base with the person prior to your meeting, and let them know what you wish to discuss, whether it's personal or professional. This helps you have a more productive conversation.

Bradt stressed the importance of addressing fears and learning to deal with the outcome. There are things that can be controlled, as well as things that are beyond your control. When you can tell yourself that you are going to make the outcome of a challenging situation work in your favor, there is no longer fear.

Bradt also advised that you can't rely on relationships that you never built, so it's important to invest in sustaining relationships. Little gestures can go a long way. If one of your contacts or someone on your to-who List had a new baby or a death in



the family, a small action like checking in with them can help strengthen the connection, as networking is not just a one-time thing.

Some may say that working from home limits the opportunities to move up the corporate ladder. It is true that not being there in person can be difficult at times; however, people do remember the time that you spent with them, the energy you spent to connect, and the impact you made during that time. As Maya Angelou said, “I’ve learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel.”

TIPS TO STAY CONNECTED

Maintaining relationships can be challenging. Whether it is a business relationship, friendship or your relationship with your significant other, relationships need time and effort. Relationships grow when they are nourished. Keeping that in mind, here are a few tips I learned, to stay connected with others:

- Networking receptions can be a great way to get to know someone and their interests. Listen to their stories but also make sure to share your experiences, whether it’s the countries you have visited, your favorite sports teams, family events, or charities you support. People love to hear about interesting experiences, and it is a great way to remember someone. The next time you meet them, it’s easier to pick up where you left off!
- In my experience, there are always at least two people at each networking event who I find interesting, and with whom I can engage in conversation. I make a mental note and then write to them immediately following the event. This way, I

make sure to keep their contact information handy. I have also found that it is okay to be selective about with whom you network, as you will not naturally connect well with everyone.

- Don’t wait for someone to reach out to you. Instead, take the first step. Set expectations ahead of time if you want to discuss specific topics. I have found that people appreciate it when you make the effort and communicate your intentions ahead of time. I also suggest setting up a lunch meeting as a one-on-one. This really helps to elevate the relationship since people are less apprehensive than in a group setting.
- Plan your meetings a few months in advance. My preferred method to connect with senior leaders or colleagues is through email, since it does not put pressure on them to respond immediately. If for some reason the timing does not work, just let them know when you can meet them next, and *follow up!*
- Follow each meeting with a personal thank you note. People are busy. If they take the time to meet you, take the time to thank them. A simple show of gratitude doesn’t take that much time! It can go far to help ensure there is a next meeting.
- Update your to-who list once a month. Take 10 minutes a month to identify people you want to connect with but haven’t had a chance to yet. This will help keep your to-who list current and make it easier for you to schedule meetings.

Digital media and social networking have made it easier for people to chat online. The access to so many family members, friends and professionals through social media may also mean that many of us neglect to keep important, in-person communications going. This can lead to missing out on the most meaningful interactions. By creating and continuously updating your to-who list, you can work on the relationships that matter the most—and give you that much-needed human touch, which technology cannot replace. ■



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ENDNOTE

- 1 Bradt, Gary. 2017. Leading Change: Adaptive Skills for the New Age, <https://www.forbes.com/sites/forbescoachescouncil/2017/04/05/leading-change-adaptive-skills-for-the-new-age/#275480cc121f>.