



Article from

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# WHAT WOULD YOU DO? Sufficient Preparations

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Here is our next entry in the “What Would You Do?” series.<sup>1</sup> Write to me at [SteppingStone@JHACareers.com](mailto:SteppingStone@JHACareers.com) to tell me what you would do. In the next issue, I’ll compile the responses received (preserving your anonymity, of course), along with what actually happened in the real-life situation.

Help me craft future case studies. Write to me about your own challenging, surprising or nightmarish situations involving business, leadership, management, or any of the topic areas covered by *The Stepping Stone*, and what lessons you learned from them. I’ll collaborate with you on turning your situation into a simple case study, being careful to ensure no one is identifiable. And share your own thoughts (pro and con) on the series as a whole at [SteppingStone@JHACareers.com](mailto:SteppingStone@JHACareers.com).

## SUFFICIENT PREPARATIONS

Martin was an ASA who had recently rotated into his first financial role, in one of his company’s core financial units. So far, things were going well, and he had good relations with everyone in the operation. He had mastered the work for which he was responsible, and his first year-end financial cycle was several months away.

A year before, there had been both an ASA and a more junior student in the operation, but this year Martin was on his own. Joanne was that junior student who had rotated into another operation, where she failed one too many actuarial exams, and needed to find a new role. Martin’s boss asked his opinion, as he was considering hiring her to be a programming and technical resource for the department. Martin agreed that Joanne had a good reputation, and was well-liked, and she was brought in.

Although Joanne wasn’t hired to assist Martin in his role, she had a year under her belt with the area’s year-end financial processes, so she offered to train Martin on what she and his predecessor had done the prior year-end. There was good documentation, which Martin reviewed thoroughly, and he quickly reached a point where he felt that he was as prepared as he needed to be.

Joanne wasn’t satisfied that Martin was taking her advice as to how to prepare seriously enough, and worried that at year-end she would be forced to work overtime to assure the deadlines were



met. Martin didn’t expect to ask Joanne to do any of the financial work at year-end, and was fully prepared to put in whatever additional hours might be required of him to meet the deadlines, so he moved on to other work.

What would you do if you were Martin? Joanne? ■



John Hadley is a career counselor working with job seekers frustrated by their search and professionals struggling to increase their visibility and influence. He can be reached at [John@JHACareers.com](mailto:John@JHACareers.com) or 908.725.2437. Find his free *Career Tips* newsletter and other resources at [www.JHACareers.com](http://www.JHACareers.com).

## ENDNOTE

- 1 Past issues in the series have considered whether to demote or fire a difficult employee, performance reviews and their aftermath, interview challenges from both sides of the desk, evaluating job offers, a difficult product decision, how to build connections with the home office, and career decisions. To catch up on the entire series, which started in May 2013, check out back issues of *The Stepping Stone* on the Leadership & Development Section website at [www.SOA.org/ld](http://www.SOA.org/ld).