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WHAT WOULD YOU DO?

Responses to “It’s Not Productive!”

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In the July 2018 issue of *The Stepping Stone*, I presented the following work situation faced by a new consulting actuary. Here are selected responses and excerpts, edited for space and clarity, followed by the real-life conclusion. Send your own ideas for situations to pose in upcoming issues to SteppingStone@JHACareers.com.

IT’S NOT PRODUCTIVE!

Foundation Life was installing a new administrative system to support its large life insurance portfolio, and the project was far behind schedule. The actuarial group in particular was taking a lot of heat for not providing enough support. Zachary was an FSA who had supported or led major systems conversion initiatives to successful conclusions, and was brought in as an independent consultant.

Zachary was very productive, writing tons of analyses and recommendations, and quickly began to make headway in bringing the project back on track. However, his client-supervisor Christine told him she “had been instructed” to review and approve every memo before release. Her style of reviewing was that:

- Zachary had to sit with Christine while she reviewed any document. During that meeting she would allow herself to be interrupted regularly by phone calls, people dropping things off (that she would insist on reading while they stood there), and so on.
- Christine wanted to wordsmith even the most innocuous of statements.

Zachary felt this was a huge waste of time; a review of a simple three-paragraph memo would take a minimum of a half-hour. This was also creating delays in getting decisions made and communicated.

This was Zachary’s first consulting assignment, and was critical to building his portfolio. He didn’t want to offend Christine and jeopardize it.

What would you do?

This respondent had a simple solution:

I would hope the consultant would remind me that his time costs money. A simple tally of how much money added up over the course of a week while I abused his time might be a great wake-up call. If not, then seeing if there is a way to meet in a conference room rather than my office might help.

And this one also suggested tackling the problem head on:

I doubt that Zachary needs to be there for the editing sessions, and if he has to explain what his words actually mean, he didn’t write well enough in the first place. He could frame this as: “I think I’m superfluous for your reviews and edits—why not edit the document with track changes in Word? I can look over your changes more quickly after you’ve done them, and it will add fewer hours to my bill.”

Unless Christine’s edits make the documents inaccurate or would cause trouble with Actuarial Standards of Practice (ASOP) 41, Actuarial Communications, Zachary should accept most edits, no matter how persnickety. He may not like the changes from an aesthetic perspective but that’s not the point. It is generally not a good use of time to argue with editors.

One actuary applied “the customer is always right” theory:

Zachary is doing work directed by the client and needs to proceed along the lines they require. It appears that something occurred that caused a review of this nature to be necessary—likely a loss of trust. It isn’t Zachary’s place to question what Christine is requiring—this isn’t a situation where his credentials are being impacted, even though the project might be able to move faster.

Zachary could attempt to influence how it is being done:

- Ask Christine if there is a format or style they prefer for memos that could potentially reduce the number of changes needed. Zachary should look at the process through the client’s eyes, not his own.
- As delays occur, inform Christine that more timely communication is essential to keep the project moving. Using tangible examples, show her the timing impact. Inform her what the deadlines will become if the process remains the same.

At the end of the day, the client is still “right” even if the project takes longer. If there were actuarial implications, the answer would be different, but this appears to be a difference of opinion on project management.

This actuary believed the key to the case is relationship:

First build a good working relationship with Christine (have lunch or catch up over coffee). Getting to know her better on a personal and professional level may give hints to her working style. Also, limit meeting times; if one goes over, tell Christine you have to go but will catch up with her later.

Another felt communication is the key:

As difficult as it may be, especially for a more junior person, Zachary must communicate with Christine that they should find a more efficient way to review materials. Rather than just identify the problem, he needs to present a solution, such as:

- Delegate more detailed reviews to another team member who would communicate with Christine how he or she got comfortable with the content.
- Have Zachary summarize salient points in a separate presentation and get Christine comfortable with these so she does not need to read all the content.
- Talk to her about efficiency, including whether there is a better way for them to review content live without distractions, to keep the deliverables moving forward.

I would start with the second option; it seems best to get Christine comfortable with summaries so she does not need to review it all. If she is not comfortable with that, then a combination of the other options seems much better than the status quo.

This respondent gave a number of specific suggestions, related to creating clear lines of communication and expectations:

1. **Start with an assumption of good intent.** Christine stated she “had been instructed” to do this. She may herself be subjected to the same level of scrutiny by her manager and is trying simply to make sure her bases are covered.
2. **Open the lines of communication.** Offer a sincere thank you for help in delivering a work product that meets the client’s expectations. Doing so requires a strong dose of humility but can go a long way toward open and honest communication.
3. **Put forward suggestions on how to improve the process.** Suggest that review meetings take place somewhere other than Christine’s office, where they can work uninterrupted. Zachary can point out how that would help Christine’s time be more productively spent. Make the conversation about how to help her.

4. **Suggest a review via email.** Zachary can suggest that this allows her to do her review at her convenience. Or perhaps this can begin once Christine develops familiarity and comfort with Zachary’s memos.
5. **When a sufficient relationship of trust has been developed, Zachary can begin to point out revisions that add little value and slow down the work.** Frame this as helping Christine and the client company, providing value to the customer.
6. **Finally, exercise patience.** Zachary is the consultant and Foundation Life is paying him. His job is to do what they ask, even if he feels it’s painful or unnecessary. If he gets pressure from other parts of Foundation Life implying that his work is taking too long, he should document it and include the time required for reviews.

The purpose is not to throw Christine under the bus or excuse why something took a long time—no value is gained by pointing a finger. However, a clearly laid-out record of time spent will reveal inefficiencies. If the client recognizes the work hinderance, Zachary should not criticize Christine, but rather indicate why the reviews are happening, and let the client decide what is valuable to them.

WHAT ACTUALLY HAPPENED?

Zachary tried leaving things for Christine to review on her own and suggested reviews via track changes or email. She was insistent that she would only review items with him present to answer any questions.

He then asked Christine if it would be helpful to her if they bundled up a number of documents and went offsite to review them. She loved the idea!

Over the coming weeks, they got together a couple of times a week for an hour and a half to review everything that had accumulated and to discuss broader issues related to the project. This helped them develop a much closer working relationship, and also helped Christine gain confidence in Zachary’s judgment and work product, while backlogs were eliminated. Before long, they reached agreement on which types of documents and decisions still required review and which could be sent out as emails with no advance review. ■



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