

The Stepping Stone

ISSUE 72 JULY 2019



**SOCIETY OF
ACTUARIES**

**LEADERSHIP &
DEVELOPMENT**



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Issue 72 • July 2019

Published three times a year by the
Leadership & Development Section of
the Society of Actuaries.

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This newsletter is free to section
members. Current issues are available
on the SOA website (www.soa.org).

To join the section, SOA members and
non-members can locate a membership
form on the Leadership & Development
Section webpage at www.soa.org/sections/leadership-development/.

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Publication Schedule

Publication Month: November 2019
Articles Due: August 8, 2019

The digital edition of this newsletter
can be found at www.soa.org/sections/leadership-development/.

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CHAIRPERSON'S CORNER

The Times They are a-Changin'

By Mitchell Stephenson

While Bob Dylan was singing his famous 1964 song about the changing times, technology was also rapidly changing. In 1961, President John F. Kennedy boldly promised to put a man on the moon by the end of the decade. Although it seemed impossible or highly improbable, on July 20, 1969, Neil Armstrong became the first man to walk on the moon.

Fifty years later, it seems like technology is evolving faster than we can keep up with it. It can feel difficult to accept this change, whether as individuals, as professionals or as businesses, but we must embrace it. If we do not, we will pay a price. Only 60 companies that appeared on the Fortune 500 list at the time of the moon walk in 1969 are still on that list today.¹ And the actuarial profession—once consistently ranked among the top three occupations in the United States²—is losing ground to other, more data-driven professions such as data scientists and statisticians.³

Yet with rapid change comes opportunity, and we must be bold and brave enough to cultivate it. The French poet Andre Gide wrote, “One doesn’t discover new lands without consenting to lose sight, for a very long time, of the shore.”

At the moment, the actuarial profession is still flourishing. Since 2010, membership in the Society of Actuaries (SOA) has grown by more than 33 percent,⁴ and the actuarial unemployment rate remains very low, at 1.4 percent.⁵ The question is, how do we ensure we stay relevant in the coming years and decades?

In this article I present some actions we as a profession are taking to embrace change and help us better prepare for the future.

FOCUS ON THE FUNDAMENTALS

Whether it’s our code of professional conduct, the education and examination system or our professional development requirements, actuaries should continue to focus on building our professional fundamentals. For example, the code of professional conduct, which applies to members of the five U.S.-based actuarial organizations, states that its purpose is to “require actuaries to adhere to the high standards of conduct, practice, and qualifications of the actuarial profession, thereby supporting the actuarial profession in fulfilling its responsibility to the public.”⁶ This expectation will keep us grounded as we embrace difficult tasks associated with technological advancements.

One SOA strategic focus this year is to redesign its professional development program, which aims to provide innovative, timely



and pertinent programs for its members, such as the new SOA exam on predictive analytics. Focusing on the educational requirements for actuarial students as well as the continuing education requirements for credentialed actuaries will help ensure that we have the right training on the right topics to embrace the challenges of the future.

STICK TO THE FACTS

One of my favorite things on the internet is a meme with a quote attributed to Abraham Lincoln: “The problem with quotes found on the internet is that they are often not true.” Obviously, that is an intentionally misleading—and funny—quote, but it presents a very real issue: How do we cut through the noise as a profession and focus on the facts? With information coming at us from many sources today, it is critical for us to remain focused on the data, what it’s telling us and how we can objectively communicate it to our stakeholders.

DIVERSIFY

Embracing diversity helps us better prepare for the future as a profession. In the past decade, the rise in jobs associated with science, technology, engineering and math (STEM) grew six times as fast as non-STEM jobs.⁷ If this trend continues, the U.S. could see a shortage of more than a million STEM workers by 2040.⁸ According to a 2017 report by the National Center for Science and Engineering Statistics, one critical reason for this shortfall is that women and minorities are underrepresented.⁹ To address this, the SOA started a diversity taskforce in 2016, with the objective of tackling similar challenges in the actuarial profession.

In addition, the SOA is examining a long-term growth strategy that includes entrance into new fields for actuaries. For example, in 2016 the SOA helped place interns at organizations that had not previously employed actuaries, one of which was at NASA.¹⁰ When it comes to being more competitive in fields like data science and artificial intelligence, it will be critical to make sure actuaries are in the mix for that work.

BRINGING IT ALL TOGETHER

Bob Dylan cautioned in that famous song, “You better start swimming, or you’ll sink like a stone.” As actuaries, we must swim—with a strong focus on the fundamentals, sticking to the facts and diversifying—so we can be prepared to embrace the challenges of the future. ■



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ENDNOTES

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REGISTRATION OPENING JULY 1.

WHAT WOULD YOU DO? Bad Grooming

By John West Hadley

Here is our next entry in the What Would You Do? series.¹ Write to me at 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.

BAD GROOMING

Franklin took a job at a new company. He was super excited, and they showed a lot of interest in grooming him for a management position. He joined with the understanding that the company would value his background in controls, but when he started making recommendations to improve existing processes,

he found them generally unappreciative of the implication that they needed to change.

He then began noticing flaws in the way the company was keeping track of how they developed models, set assumptions and reported results. As he continued to press more on making process improvements, management ignored and shunned him even more.

Franklin became concerned that the company could make a material error or misstatement because of the lack of adequate controls and appetite by management to address them. He began to think about his best course of action, including escalating the issues internally, pushing some of the changes through without management endorsement or looking externally for another position.

What would you do? ■



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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; miscommunications; 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 webpage at www.soa.org/sections/leadership-development/.



WHAT WOULD YOU DO?

Responses to “Hire the Best”

By John West Hadley

In the March 2019 issue of *The Stepping Stone*, I presented the following hiring decision faced by an experienced actuary. Here are selected responses and excerpts, edited for space and clarity, followed by the real-life conclusion. Please note that inclusion of responses should *not* be taken as an endorsement by either the section council or the Society of Actuaries (SOA) of the positions presented. Send your own ideas for situations to pose in upcoming issues to SteppingStone@JHACareers.com.

HIRE THE BEST

Mark interviewed two internal candidates, Brian and Beverly, for an open position.

Brian

- did not tell his manager in advance about the job application,
- took longer to complete the procedural steps in the process, and
- seemed to be applying in part because the role was a promotion.

Beverly

- had been in active discussions with her manager about her next career step, even before the interviews,
- was quick to complete each step in the process, and
- seemed more interested in the role on its merits.

However, Brian had interviewed better on competencies and skills such as technical background, communication style and ability to use and innovate with technology. When Mark asked the interviewers to rank them, overall feedback, such as rating by competency and total rating, consistently ranked Brian higher, but only slightly.

1. What weight should Mark give to Brian’s versus Beverly’s apparent motivations for the job, as opposed to their qualifications?
2. If he must make a decision based just on the interviews and information he already has, whom should he hire?
3. Is there anything else he should consider doing before making an offer?

What would you do?

Almost all respondents felt that Beverly was the preferred candidate, with these two exceptions:

I do not see it as a negative that Brian is applying for the role because it would be a promotion. Rather, I view this as a positive—he is career motivated and looking for upward mobility. To me, this indicates that he would work hard to deliver results and thus continue progressing in the company. I also do not see it as a red flag that he did not share the opportunity with his manager. In an ideal world, strong employees should be supported when they pursue internal moves, but this is not always the reality. Perhaps Brian’s current manager would have tried to block his move, and that’s why he wasn’t open about it. Given the fact that Brian scored higher with the interviews on the role competencies and appears to be a more qualified candidate, I would offer the job to Brian.

I would go for Brian, as he is slightly more qualified. He is not obliged to disclose his career plans to his manager, so this is not a problem. Regarding the longer time that he took to complete the process, he may not be as organized and diligent as Beverly, but he delivered. Last but not least, if his intentions were to get promoted, he did the right thing in applying. I see nothing anomalous in that. The slightly better skills shown by Brian, technical background, communication style and ability to use and innovate with technology make him my choice.

This response encapsulates the general preference for Beverly:

A hiring manager has a responsibility to look beyond just the technical skill set when considering candidates. The intangible elements of enthusiasm, attitude and desire have to play a role. A technically competent hire who is slow and unmotivated (the traits that would appear to be possible if hiring Brian) greatly diminishes the value of the technical skills. Given that the ratings for the competencies and skills are close, I would recommend hiring Beverly without hesitation. If there had been a large disparity in skills, then my answer might be different—or might even be to hire neither and keep looking for the best fit overall.



This respondent echoed how critical it is to have a motivated employee:

I view motivation as a critical factor in hiring. Beverly is highly motivated and excited about this opportunity; Brian appears not to be. I want to have achievement-driven people working for me. Assuming that Beverly has an acceptable level of technical and other skills, she would be the better long-term hire. A well-motivated person will work hard to improve on their deficiencies. The other consideration for Mark is if neither Brian nor Beverly would be considered a good hire. Mark should not settle.

This actuary expressed concern about Brian’s approach:

I would be concerned about Brian’s approach to the process—as he was secretive about it and was partly focused on the promotion opportunity. I would wonder if in another year or two he would act in the same way and leave the position for a different opportunity without giving Mark any advance indications. I would also be concerned if Brian was potentially creating a negative reputation due to his lack of communication with his prior department in looking for a new role. If I were Mark, I would question his integrity and true interest in the role.

This respondent emphasized the importance of motivation in a hiring decision:

Motivation is such an important factor for good performance; I’d give it a slight edge over qualification. Actuaries in general are good at learning new skills, and a motivated employee can bridge a knowledge or skill gap pretty quickly. On the other hand, an unmotivated employee may not perform at the level of capability.

Mark should hire Beverly. She has had a clear plan for her own career development and is motivated to do a good job in this role. Beverly’s competencies are only slightly below Brian’s, so she should be able to have a good start.

A potential additional question to ask Brian and Beverly is how this new role fits into their longer-term career goals. Their intention with the role might not match what’s needed. For example, Mark may look for someone for his own succession plan, but the applicant might consider this to be a quick rotation and plan to exit in a couple of years.

This actuary came down somewhere in the middle:

- 1. What weight should Mark give to Brian’s versus Beverly’s apparent motivations for the job, as opposed to their qualifications?** I would give 40% weight on motivations. Hiring someone with the right intentions is always important, and technical skills can always be improved.
- 2. If he must make a decision based just on the interviews and information he already has, whom should he hire?** He would need to hire Brian.
- 3. Is there anything else he should consider doing before making an offer?** Mark needs to ask Brian why he didn’t tell his manager about his application, and the answer may uncover important insights. If it reveals issues with working relationships, then Mark needs to consider this carefully. A collaborative and easy-to-work-with team member is more important than slightly higher technical skills.

And, finally, this respondent gave a particularly thorough analysis:

In deciding between the candidates, there are a number of considerations:

- What is the urgency of progress in the role? Is getting this position filled critical, and does it involve high-priority tasks? If urgent, then getting results quickly may be of a greater concern versus being able to develop the individual over time.

- What is the company philosophy on longevity? Are people moved around relatively often? If the person is deemed to be more temporary in the role, that would alter the skills desired as they come into the role.
- What have been Brian's and Beverly's employment histories? Are there performance issues? If the desire is to have the candidate in the role for a long period of time, the length of time in prior roles may be important. And you may not want to inherit performance issues from another manager.
- What skill set is desired? Are there better candidates outside of the company who could be considered? This depends heavily on the company's desire to promote from within and the amount of time needed before the position should be filled. It will take considerable time to get an external candidate process completed.

What Mark felt he had learned was that he should definitely give more weight to the way candidates approach the process, as well as their motivations.

Without knowing the answers to these, my thoughts would be:

1. Motivation is key for how long I'd expect a candidate to remain engaged in the department and the work performed. Beverly seems to be the preferred candidate as she is more interested in the role, not just the promotion. Excitement does not equate to success, but given the only slight skill difference, I'd give the edge to Beverly as the more likely long-term candidate for the position.
2. The facts that Brian has not told his manager and is primarily looking at this as just a promotion raise red flags for me.

If there was a significant skill difference, I'd put less weight on these red flags, but my concern would be Brian either leaving the department or leaving the company to gain a promotion. I'm not opposed to individuals moving ahead in the organization, but they need to ensure a smooth transition within the company. In the future, Brian could decide to leave without adequate notice to prepare others for his role.

3. A critical step is if either candidate has the minimum level of skill needed for the role. Mark needs to determine whether looking at just these two candidates is sufficient. If neither candidate meets the need, he would be better off taking longer to find a better fit.

WHAT ACTUALLY HAPPENED?

Mark made the offer to Brian. Brian then spoke with his management team, who requested several days to pull together a counteroffer. This slowed down the entire process.

Brian accepted the counteroffer, and when Mark got back to Beverly, he found he had to do damage repair; she was apprehensive about being the second choice. This led to good and honest feedback on the interview process, which helped them have an open dialogue, and Mark made sure Beverly knew how enthusiastic he was that she would be joining his team.

She did great in the role, proving to be a self-starter, well qualified and super motivated. Brian continued to do fine in his higher role on his other team, so all turned out for the best.

What Mark felt he had learned was that he should definitely give more weight to the way candidates approach the process, as well as their motivations. ■



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BUSINESS MANAGEMENT

The Cookies Matter ... and Other Lessons I Learned as President of ACHS

By Amanda Hug

“Bring back the yummy cookies!”

“A number of folks were looking forward to the cookies, but they were not available.”

“Missed the cookies and Diet Coke.”

“Please add the cookies and brownies back to the afternoon break!”

These are just a few of the many comments we received about the cookies—or rather, lack thereof—in a post-meeting survey to the attendees at one of our Actuaries’ Club of Hartford & Springfield meetings.

The Actuaries’ Club of Hartford & Springfield, more affectionately known as ACHS, is the largest actuarial club in the country, attracting over 400 attendees to our semiannual meetings in Hartford, Connecticut. Every spring and fall, ACHS hosts a one-day event that offers 15-plus high-quality sessions, six-plus continuing professional development credits, breakfast, lunch and a networking reception. It’s an impressive production that has grown in magnitude over the past 30 or more years thanks to the actuarial leaders of the Hartford and Springfield area who have poured their time and energy into building it into something remarkable.

I had the pleasure of serving as president of ACHS from 2017 to 2018, where I worked with an impressive group of volunteers and speakers who taught me many lessons along the way. At my first meeting as president, I made a few innocent swaps to the menu for the day in the interest of offering variety and some healthier options. I quickly learned that even if you have the *best* sessions with the *most dynamic* speakers covering the *hottest* topics, the cookies still matter. Duly noted.

I now offer a few other (perhaps slightly more applicable) lessons I learned over my tenure.

YOUR VOICE IS A POWERFUL TOOL

When I joined ACHS as a member of the planning committee, Kat Pezzullo was the vice president and led our committee meetings, all of which happened via conference call. I remember feeling overwhelmed by the mosaic of new voices, not being able to tie any of them to the names I saw on the Outlook invite. Yet Kat’s voice was one I quickly learned to identify, in part because she was leading the call, but even more so because of the warmth and positivity she conveyed through her voice.

At 10 a.m. each Friday, as the beeps rolled in, she greeted each joiner of the call with a genuine enthusiasm to have them as a participant. As she led us through the agenda, she was quick to thank team members for their efforts and express her excitement about how the meeting was coming together. When I became an officer myself and started leading our weekly calls, I sought to emulate Kat’s warmth and authenticity, looking to build a community as she had, all over the phone. In our ever-increasing digital age of communication, don’t forget the powerful tool you have in your voice to aid you in building personal connections from afar.

GIVE YOUR FUTURE SELF A GIFT

Next we have to talk about something that’s not very glamorous but is so, so important, especially for a volunteer committee and officer team with regularly scheduled turnover: S-T-A-N-D-A-R-D W-O-R-K.

As I expect is the case for many industry clubs and committees, when I joined, files were circulated via email, there was little if any version control and the documented timeline for planning the meeting was a simple list of 15 action items. It might not surprise you to learn that to successfully produce a full-day meeting with 15 or more sessions and more than 400 attendees requires a few more than 15 tasks!

In collaboration with Kat, I created a central file repository for the committee (we used *Box.com*, but any sharing site will work) and started documenting every single thing the committee, Kat or I did in the six months leading up to the meeting. The result? Our task list was blown out from 15 high-level milestones to 127 specific and concrete tasks. But the real benefit was not 127 rows on a spreadsheet in Excel. It was the efficiency we gained as a team from one meeting to the next.

Officers no longer needed to use valuable head space and time remembering and communicating what we were supposed to be working on three months out from our event. It was instead right there on our shared site for everyone to see. I had given myself



and future officers the gift of the ability to focus on higher-value-added work. It doesn't take much to build out standard work as you're going through a process, and your future self and those who come after you will no doubt thank you for that gift!

IT TAKES JUST FIVE MINUTES

The day of our meetings was a whirlwind. As an officer, I was on the go from 7 a.m. until 6 p.m., at which point I literally collapsed into a chair with a glass of wine. (My fellow officers can relate and attest!) Throughout the day, I was checking things off my Day-Of To-Do List (see above), answering questions, thanking sponsors, trouble-shooting problems and presenting a club update.

There was no specific need for me to greet our 25 speakers for the day, because each speaker had a dedicated representative from our stellar planning committee to ensure his or her session went smoothly. However, I still made sure to carve out a few minutes in between sessions to pop into each breakout room to introduce myself and thank the speakers for their time. It was a small gesture, but it served two purposes:

1. It ensured that every speaker was personally thanked by an officer of the club. Our meeting is only as good as our speakers, so it was important to me that our speakers got the recognition they deserved for putting together a thoughtful and engaging session.
2. It allowed me to put a face to the names on our agenda, as well as allow the speakers to put a face to *my* name.

It took me only about five minutes at each session time to make the rounds, but I received feedback from the planning committee

that the speakers really appreciated the personal thank-you. In addition, after two years serving as an officer of the club, I had established many new "loose ties" in the industry. I have already seen these loose ties lead to further professional connections and opportunities. A win all around for five minutes well spent.

DON'T LOSE SIGHT OF GOOD IDEAS

Putting on events for ACHS would not be possible without the dedicated planning committee members who do so much of the work for our meetings. This talented bunch of actuaries is full of ideas, and many of them usually pop up right after we finish a meeting:

"We should have ..."

"Next time why don't we ..."

"It would have been better if ..."

Given the six-month lead time for the meetings, it would have been easy to lose sight of these suggestions or fall back into what we've always done. To prevent this from happening, we created a Running Ideas List, where we captured all ideas that popped up as to how to make ACHS even better.

One simple idea was suggested by planning committee member Krista Weber. When ACHS became a fully paperless meeting, some of our attendees found themselves missing a printed agenda to know when sessions started and ended. Krista suggested utilizing the white space on the back of the badges to print the agenda. We could stay paperless, but still deliver the information our attendees were seeking. We captured this suggestion in our Running Ideas List and when the time came to

print the badges for the next meeting, our secretary went ahead and printed them with the agenda on the backs.

Following the meeting, Krista sent the officers a note saying, "It was great to see the agenda on the back of the name badges! That's why I love being a part of the ACHS planning committee—ideas are actually brought to fruition." Her note made me realize how important it is to put good ideas into action. It not only results in a better meeting, but it also makes the most of the talented group of volunteers, keeping them active and engaged. I encourage you to do the same for your teams: Be a leader who helps bring good ideas to life!

MORE THAN COOKIES?

I'm happy to share that while our meeting attendees are very passionate about their chocolate chip cookies, they also find real value in the rest of the day and show great appreciation for the work of the planning committee.

"Many thanks for putting together a useful meeting with interesting and topical speakers and sessions."

"Thanks for making this happen—the meeting is getting better every time!"

"I seriously appreciate the effort that you guys put into making these meetings fun and informative."

"Thank you. The growth of this club over the years and the quality of the meetings is amazingly awesome."

I concur: ACHS is amazingly awesome, and in very small part due to my contributions. I'm thankful to have had the opportunity to take something already great and make it just a little bit better. It's this sort of feedback that makes the 127 tasks in the planning cycle all worth it. ■



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BUSINESS MANAGEMENT

The Power of Habit

By Eric Unger

Editor's note: In the Leadership & Development Section's Leadership Inspiration Contest, entrants were asked to tell us what inspired them to be better actuarial leaders. Here is an early entrant winner from the Inspiring Book category.

In his book *The Power of Habit*,¹ Charles Duhigg tells a tale of finding common ground and reaching consensus on change. The common ground that was sought between warring corporate tribes was mutually beneficial, not just to achieve the ends to which those changes were aimed, but also for the cooperation that they engendered across the entire organization.

In 1987, Paul O'Neill took over as the chief executive at the industrial giant Alcoa, the Aluminum Company of America. At the time, Alcoa stock was down, management's relationship with the workers' union was rocky and nearly everyone was looking for a reason to quit. In contrast to the conventional corporate cheerleading that was in vogue on Wall Street at the time, O'Neill searched for and found a common theme that united the line-level workers and their managers: worker safety.

Once he found a common interest that was not a zero-sum game, he proceeded to transform the company, doubling its dividends and raising its net income fivefold during his tenure. O'Neill's vision was the basis for a powerful but unwritten union-management contract, binding them together against their common threat of industrial accidents.

In the same way, actuarial leaders of the future need a vision that requires shared buy-in against common threats and in pursuit of common goals—much the way the terrorist acts of September 11, 2001, drew the United States together, albeit temporarily.

This shared posture, whether in defense of lives and values or in pursuit of innovation and transformative growth, is not *only*



useful for the end to which it aspires, be it worker safety or actuarial productivity. Rather, the usefulness of standing together as a corporation or actuarial team lies in the recognition of something worth sacrificing for and someone—regardless of background, rank, personality or management style—to work and strive alongside, and in so doing, expose your common humanity to. ■



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ENDNOTE

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COMMUNICATION SKILLS

Crisis Communications, Social Media and Hamlet

By Jean Bolduc

To tweet or not to tweet? That is one question never posed by William Shakespeare, but he did have a thought or two (several plays actually) about the “slings and arrows of outrageous fortune.”

“Outrageous fortune” in the modern age has a different name—“crisis”—and it presents in all shapes and sizes. Those of a personal nature include a car accident, a heart attack or a missing family member. On the larger scale, there are major storm events, earthquakes, rockslides, mass transit accidents and chemical spills.

Actuaries can play a major role in one of the pillars of managing major crises: communications. For tornado victims, for example, there are critical pieces of information that the public at risk and those affected afterward need to know. These include warnings in advance of the event and damage reporting in the immediate aftermath, when more conventional means (television, telephone land lines) are down due to power disruptions and infrastructure damage.

Enter social media.

In the Society of Actuaries (SOA) 2016 report *Social Media Analysis of Catastrophic Response: Twitter Data Analysis of Tornadoes*, authors R. Dale Hall, Steven Siegal and Kailan Shang examined Twitter data from three major tornado events: Joplin, Missouri (2011); Washington, Illinois (2013); and Rochelle, Illinois (2015).

Because Twitter would typically still be functioning as long as cellular phone service existed, residents and first responders were able to use the social media network, not just as a redundancy in issuing public warnings before the storms, but also after the events to locate victims, warn of unsafe conditions and direct the public to safety. This is often hyperlocal information—for example, that a Red Cross van is at the corner of Elm and Main

Streets offering assistance to anyone who can get there or which schools are in use as shelters.

As risk managers examine these events, they learn more and more about how damage is done, who survives and, to some extent, why they survive. Communicating these key pieces of life-saving information in the short form of social media can be an art form all its own—perhaps more art than science.

TIPS FOR USING TWITTER AS A PROFESSIONAL TOOL

- Reserve your own name as your “handle,” even if you don’t use it. (Mine is @JeanBolduc—follow me!)
- Add your Twitter handle to your email signature and your business cards to gain more followers.
- When you set up your account (just go to www.twitter.com and follow the instructions), you’ll be asked about your interests and advised about some of the ins and outs of using Twitter. It’s best to set it up on your primary computer’s desktop, then add the app to your smartphone for mobile use.
- Learn some of the ways of abbreviating your messages to get the most out of the 280 characters you’ll have for each tweet. For longer messages, you can keep your message going by adding subsequent tweets as replies to your first tweet. This is referred to as a “thread” of tweets.
- Hashtags are what users call it when they mark a word or phrase with the pound sign (#). This is used both for emphasis and for creating a tag for searches. For example, “The @SOActuaries will hold its Annual Meeting in Hawaii this fall. #golf #beaches #BestConferenceEver.” Be sure to use no spaces between words in a hashtag.
- When you’re first using Twitter and have very few followers, one of the best ways to have your tweets seen is to respond to users who do have lots of followers.
- When you refer to other Twitter users, include their Twitter handle and they will automatically be notified of your tweet. You can work it into your tweet, as in the SOA annual meeting example, or just drop it in at the end.
- Tweets with photos get more attention. The picture doesn’t have to be related to your tweet. Use a photo of a puppy (especially if it’s *your* puppy) and then tweet about reserves. Have some fun with it: “Now that I have your attention, let’s talk about completion factors.”



In managing risk and preventing loss of life and property, the more forensic information we have about such disasters (causes of death and injury as well as which buildings failed structurally and why), the better we can do in advising the public on how to be safe during the most dangerous periods of any event.

If you choose to offer your analytical expertise to your followers on Twitter, who can be located anywhere in the world, it's important that they understand who you are and why they should listen to you.

A great example of this is a little-known attorney who had spent most of her career in public service, but not in the highest profile. Jill Wine Banks was a prosecuting attorney with the Special Counsel's Office in the Watergate investigation. In the past two years, she has spent a lot of time explaining the law to the American public on television and on Twitter, where she has developed

a following for her smart insights and for the distinctive pins that she wears on television appearances. Her tweets are often accompanied by photos of the pin she's wearing on that day and the hashtag #JillsPins.

That may seem trivial, but it achieves an important communications objective: It's her brand; it humanizes her and makes her relatable to the audience.

How would an actuary achieve something similar? Is there an area of our culture (Baseball? Golf? Football? Music? Cat behavior?) where your hobby interest is well served by your statistical expertise? Start tweeting about that, something you enjoy, just for fun. You'll find like-minded folks pretty quickly. Follow them. They'll likely follow you in return.

Identify industry leaders and organizations (like @SOActuaries) and follow their feeds. You'll discover fascinating links to all manner of resources: studies, videos, presentations and more.

In the next 20 years some of the hottest topics of public policy debate will require us to better understand the role of risk management. As we live longer and manage our finances to sustain us, protect business assets from cyber crime and see our mortality and quality of life profoundly affected by climate change, all of these areas require a reexamination of risk. Actuaries can help explain it.

If you choose to offer your insights on Twitter, you need to be aware that this is a platform with very, very few restrictions. Some people on Twitter want nothing more than to insult total strangers, set new records for rudeness and be generally destructive to others using the platform. Twitter provides you the ability to block these users from seeing your tweets, and you will be better off blocking them than engaging in debate. There's a difference between a free exchange of ideas, some of which you may not agree with, and offering yourself for abuse.

Social media can provide you with connections all over the world and a quick, easy way to share documents, audio and video worldwide.

So, what do you have to say to the world? ■



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COMMUNICATION SKILLS

The Source of Courage in Leadership

By Stephen Camilli

Editor's note: In the Leadership & Development Section's Leadership Inspiration Contest, entrants were asked to tell us what inspired them to be better actuarial leaders. Here is the winning entry from the Inspiring Leadership Quote category.

Courage is being afraid, but going on anyhow.
—Dan Rather

This quote rang especially true with me in several moments of my life when faced with the lonely abyss of being a leader: working to set up a network of food banks in a foreign country, dealing with unruly students in a high school math class and taking my first steps in leading a Society of Actuaries (SOA) section council. In each of these experiences, at different times, I felt assailed by thoughts of inadequacy and the desire to



run from the leadership duties that I had chosen to take on. But each time, after some soul searching and an objective analysis of my skill set, other people's comments and reflecting on why I was in that position, I realized that I was exactly where I needed to be and I should not pay attention to the "phantom thoughts" that my fear was sparking in me.

In analyzing my own feelings of hesitance or reluctance when faced with a leadership position, it has helped to look back at some historically renowned leaders, their experience taking on new responsibilities and how they responded.

- **Moses.** In the biblical account of God calling the prophet Moses, despite direct signs from God, Moses shows significant reluctance to become the leader of the people of Israel, saying, "I am slow of speech and tongue." However, he went on to lead a group of people out of slavery to their new promised land. Similar reluctance is seen in the story of the Old Testament prophets Isaiah and Jeremiah.
- **Abraham Lincoln.** By many historical accounts, Lincoln suffered repeated bouts of depression. He sought, in his suffering and doubts, to find strength in the service of a greater cause. There is an excellent article in *The Atlantic* about Lincoln's leadership despite, and perhaps inspired by, traversing frequent depression and melancholy.¹
- **King George VI.** The famous subject of the film *The King's Speech* struggled with fear and stammering, yet, with the help of a speech therapist, he moved forward with a nationally broadcast speech that was key to Britain's morale upon declaring war on Germany.

In thinking about what these have in common, I've asked myself what the source of this courage was, and I've decided that it is about taking the focus off of oneself and one's own feelings and focusing on the needs of those you have chosen to or been chosen to serve. Perhaps this is a key foundation for courage, focusing on the good of others. In doing so, your truest self will come out and you will be able to go on, despite being afraid. ■



Stephen Camilli, FSA, is president of ACTEX Learning and attempts, with varied success, to focus on the needs of others. He can be reached at stephen@actexamdriver.com.

ENDNOTE

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COMMUNICATION SKILLS

Four Reasons why Your Excellent Productivity Makes You a bad Leader

By Juan Arroyo

When I started my journey to become a certified leadership coach, trainer and speaker, one of my biggest surprises was how little the actuaries around me seemed to care about developing their soft skills.

We all spoke about the importance of soft skills to get promoted. We all used leadership buzzwords. But when it came to putting in the time and effort to practice and hone those skills, the answer usually was a version of “I don’t need it” or “I don’t really have the time.”

I fully understand that point of view. After all, actuaries are smart individuals and there’s no question that their production ability is what got them into that influential position. They may be thinking, “Why would I need to work on my leadership skills if I’m already in a leadership role?”

The answer is simple: Being a leader is not a glorified production role; it’s about setting direction, creating a strategy, planning for the future and developing the next generation of talent.

Yet, most actuaries, including myself until recently, approach a leadership role as an upgraded technical role.

In this article I discuss four mindset mistakes smart people make when they first land a leadership role.

1. ASKING FOR HELP IS A SIGN OF WEAKNESS

The primary sin of the high achiever is the phrase “I can figure it out.”

The higher you go in the success ladder, the more you may think you have to have all the answers, because that proves you deserve the role.

Yes, it is true you can figure it out. But should you? Isn’t there someone else who could take that project on so you can use the time for something more leadership related? (And perhaps it will be a development opportunity for that other person!)

I ran into this situation many times when I offered my help to directors, vice presidents, regional leads and other business leaders. I did it myself, too.

There is this fear that if we accept help, our staff will think we aren’t good enough to be in that position. In fact, when leaders choose to never ask for help nor accept it, they become so swamped in work that they don’t have time to take care of their staff, set the vision or ensure the strategy is being implemented.

Let’s put it to bed: The staff already knows our weaknesses and pretending we don’t need help simply shows a lack of integrity and opens the door for distrust.

One of my biggest surprises was how little the actuaries around me seemed to care about developing their soft skills.

2. IT TAKES ME LONGER TO TRAIN THEM THAN TO DO IT

I love this one because it’s true. Yes, the people who use this phrase will always be right, because they have performed the task before and it’s also their way of solving the problem.

The trouble is that this is shortsighted in regards to what most benefits the organization. The up-front cost of training a staff member to do the production tasks we used to do might be high, but it’s relatively small in the long run. Why? Because a leader is supposed to be handling the big picture for the team or organization, not doing hands-on work 80 percent of the time.

I remember the first time we introduced a new trend model at my company. Our vice president spent two weeks of hands-on work analyzing trend with us and making all decisions. While he was with us for those two weeks, there was no one to work on the overall financial analysis and strategic planning.

Since he was making all decisions and performing the analysis, having 20 actuaries in a room watching him do it was an expensive misuse of resources.



The main benefit of training someone to do what we used to do is that the next time the task shows up, we don't have to do it ourselves. The time we save can be used for something more strategic in nature.

3. BEING RESPONSIBLE FOR IT EQUATES TO "I HAVE TO DO IT"

This mindset is one of the biggest fallacies we retain from our production days. Since we got promoted by doing all kinds of technical tasks, we assume that when we start leading, we also have to be doing everything that comes to our desk.

Whether it is fear of lack of control or having the sense of responsibility for the success of the team, leaders need to change this mindset. Being accountable for the results of the team doesn't mean we have to do everything ourselves.

It's funny how we want things to be delegated to us when we are starting a job, but we forget to delegate when we start leading a team. When we are leading a team, we need to ask *who* should be doing the project rather than *how* is it going to get done.

4. MY JOB IS TO PRODUCE MORE THAN MY TEAM

This is the mindset that differentiates leaders from individual contributors.

All leaders must transition from production to strategy. What I mean is that the leader's effectiveness is not measured by how many projects, tools, analyses or gadgets he or she produces but by how well the team performs.

The leader has to start thinking about

- setting the pace for the team,
- identifying gaps in talent,
- establishing future goals,
- equipping the staff with the resources needed to do the job,
- generating team members' engagement, and
- developing each person's talents.

A leader is required to think beyond the tasks. Unfortunately, since our promotion comes from how much we produce, we tend to think the same approach is what works in a leadership role.

A FEW POSSIBLE SOLUTIONS TO TRY

When you're ready to rethink your mindset, give these ideas a try:

- Test the notion of asking for help or accepting it and see if it changes how your staff thinks of you.
- Pick one project you would rather not do, take a couple of hours to train your best prospect on how to do it, let her do it a few times, then have her train someone else.
- Ask "Who on my team is a better fit to tackle this project?" to start testing delegation. Hint: Sometimes your most experienced person is not the right person for the job.
- Look for a combination of passion, talent, interest and experience to determine the *who* when delegating.
- Practice thinking about what's best for the team, and focus on activities that improve the team as a whole rather than a specific task or project.

At the end of the day, leadership expands beyond ourselves. It is a transition from *me* to *us*.

I hope this challenged you to shift your perspective. ■



Juan Arroyo uses inquisitive conversations to guide high achievers on maximizing their talent to go from success to significance. Schedule a 90-minute strategy session by emailing hello@juanonecoaching.com.

PERSONAL DEVELOPMENT

Reflections at Crunch Time

By Tony Batory

Editor's note: In the Leadership & Development Section's Leadership Inspiration Contest, entrants were asked to tell us what inspired them to be better actuarial leaders. Here is one of the winners from the Early Entrant category.

A version of this story was published in the May/June 1996 issue of Contingencies. Another version appears in Actuarial Jokes, Memoirs and Other Minutiae, by Tony Batory, published 2015 by Outskirts Press. Reprinted with permission.

There are many types of actuaries: casualty/life, consulting/insurance, Big A/little a. I have a categorization based on writing tool. I'm a WP actuary. I use a wood pencil.

Most actuaries use pen. In the midst of advances in technology, some actuaries consciously or unconsciously pursue an aura of infallibility drawn in ink. The question is whether this goal has become passé in today's business environment.

Some actuaries use mechanical pencils. That's a cop-out. Some of these MPs don't even have erasers, which defeats the whole

purpose of a pencil. The apparent advantage of not having to sharpen the thing is illusory, since the uniformly thin lead frequently breaks, leaving minute chunks of graphite scattered across the horizon of your workstation.

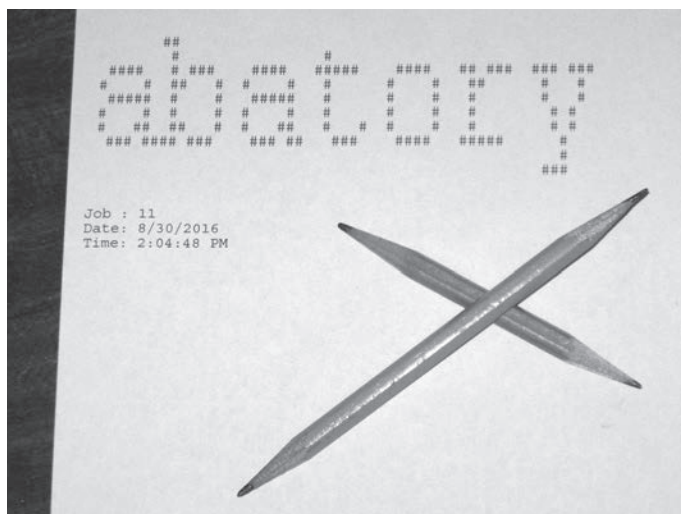
The business environment had an impact. With various mergers and acquisitions, I worked for four different companies in four years. With the owner du jour expressing a special interest in the current project, our weekly status meeting grew tense when a subtle miscommunication made missing our deadline a possibility. Contributing to the anxiety was a 20-ounce cafeteria coffee that had been known to dissolve plastic spoons and an adrenalin buildup from having to sit quietly while our contract lawyer tediously outlined the problem.

With no other outlet, I found myself chewing through my pencil. First the eraser, then the metal band and finally the wood itself. A symbolic taste of ashes became a real taste of graphite as I fretted about our blown project. But the tension release was valuable. The graphite dust that settled in my beard added a steely distinguished look, reminiscent of the gray hairs that this project was adding to the heads of my colleagues. That inspired discussion about an actuarial hair-coloring product with a new tint for the aspiring analyst: lead. The marketing slogan would be "Only your actuary knows for sure."

When I returned to my desk and stared at the jagged end of my pencil, the consequences of "crunch time" became physically apparent. Something possessed me to shove that jagged end into my electric sharpener. Out came a double-edged sword, a fitting symbol of the project that we were working on and of actuarial prowess in general: how to turn adversity into flexibility. My new device was also a reminder of the people who were pulling overtime on this project; while they were burning the candle at both ends, I was sharpening my pencil at both ends.

Our project turned out OK; we made our deadline. And although there was a lot of hard work from a lot of people, I don't discount the role of my two-sided WP. I became a WP purist, although not always two-sided.

The permanence of ink is unsuitable in a flexible business environment. And though technology will doubtless continue to advance, there will always be a place for the WP—in my heart, in my hand and between my teeth. ■



Tony Batory, MAAA, is a retired health care actuary and can be reached at abatory@cox.net.

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PERSONAL DEVELOPMENT

Why I Said it Would be Worth It

By Alan Gard

Editor's note: In the Leadership & Development Section's Leadership Inspiration Contest, entrants were asked to tell us what inspired them to be better actuarial leaders. Here is a winning early entrant from the Leadership Quote category.

I never said it would be easy, I only said it would be worth it.
—Mae West

I have heard that quote many times recently. As the board chairperson for a nursing college, I have had the privilege to award diplomas to the graduates at commencement. As the graduates cross the stage, a personal message they have written ahead of the ceremony is read. The graduates mostly use these statements to thank family and friends for their support and to recall humorous or hard times with fellow students. Frequently, the messages start with famous inspirational quotes. This Mae West quote turns up in those messages over and over and over.

In reflecting on that quote and why it is so popular, my first realization was this: Mae West was an actuary! Her comment is a classic risk/reward statement. The first two instances of “it” refer to the reward or outcome. The last “it” is the risk or the investment. On the surface, this quote could be paraphrased as “the reward will be worth the risk.” But that isn’t very quotable.

It makes sense for graduates to relate to this quote. They all have invested years of hard work and emotion into getting their degrees. At this college, many are first-generation college graduates or come from low-income backgrounds and have had to overcome a lot of adversity to finally reach their goal. With health care jobs in high demand, the graduates all have careers to look forward to and can now start realizing the return that will make their investment worth it. I can very much see Mae the Actuary talking to them about the worth of the expected net present value of their future earnings.

West was also a pretty intuitive psychologist. The more obvious inspiration from this quote is for those who are in the midst of striving for a tough goal. This quote could easily have been



West talking to an actuarial student nearly burned out on studying a week before an exam. She is urging that student on with a reminder that there will be a great sense of accomplishment at the end. In almost every case, big effort brings satisfying reward. I've not heard any actuaries say upon earning their Fellowship, “I wish I wouldn't have worked so hard.” Similarly, I've not heard runners after completing a marathon regretting how hard they trained.

Those latter observations led me to the conclusion this quote is really a call to arms to always be taking on hard challenges. While external worth may be bestowed upon completion of a hard task—degrees, Fellowship certificates, medals—it is the value we generate for ourselves through our hard work and perseverance that creates real worth. I've realized this isn't a risk/reward statement. It's a cause/effect proclamation. When I think of this quote now, I rephrase it a bit: “I never said it would be easy, that's why I said it would be worth it.” ■



Alan Gard, FSA, MAAA, is an executive director at Aetna, chairman of the board of Nebraska Methodist College and a member of the board of directors for the Good Samaritan Society. He can be reached at argard@aetna.com.

PERSONAL DEVELOPMENT

Three Steps to Find Your Perfect Mentor

By Rong Rong

We all need a mentor who can help us navigate challenging job situations or guide us through complicated life events, but finding a great mentor is no easy job. I met *the* mentor using the tool in *Playing Big* by Tara Mohr.¹ *The* mentor is wise. Every time I knock on his door, he is right there and ready to give me actionable advice. He always has my best interests in mind and the easiest answer to some of my toughest questions.

In today's world, the internet has answers for almost everything, and we forget to slow down and listen to our own wisdom. Most of the time, when we choose to close our eyes, take a couple of deep breaths and quiet our mind, we will be pleasantly surprised by the insight we have. These can be big questions like "Do I take that new job?" or "Should I buy that house?"; or very specific questions like "What is the best approach to this new project?" or "How should I deliver this tough message to one of my team members?"

No one is able to answer those questions better than ourselves. The best mentor lives within us every day, so finding your best mentor takes only three easy steps:

1. Find a quiet place.
2. Close your eyes and imagine you are taking a long walk toward your future self's house.
3. Once you arrive, knock on the door to meet your future self (a.k.a. your best mentor) and ask your questions.

You can try out the "playing big" inner mentor guided meditation on Tara Mohr's website (<https://www.taramohr.com/book/inner-mentor-signup>). This helps you meet your mentor for the first time, and afterward you will find the process gets easier and easier.

I hope this short article reminds you to check in with yourself often and reach out to your inner mentor before you open the web browser. Please drop me a note if you find this idea interesting or want to share your first meet-up with your best mentor. ■



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ENDNOTE

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