

# MANAGEMENT AND PERSONAL DEVELOPMENT SECTION

"A KNOWLEDGE COMMUNITY FOR THE SOCIETY OF ACTUARIES"

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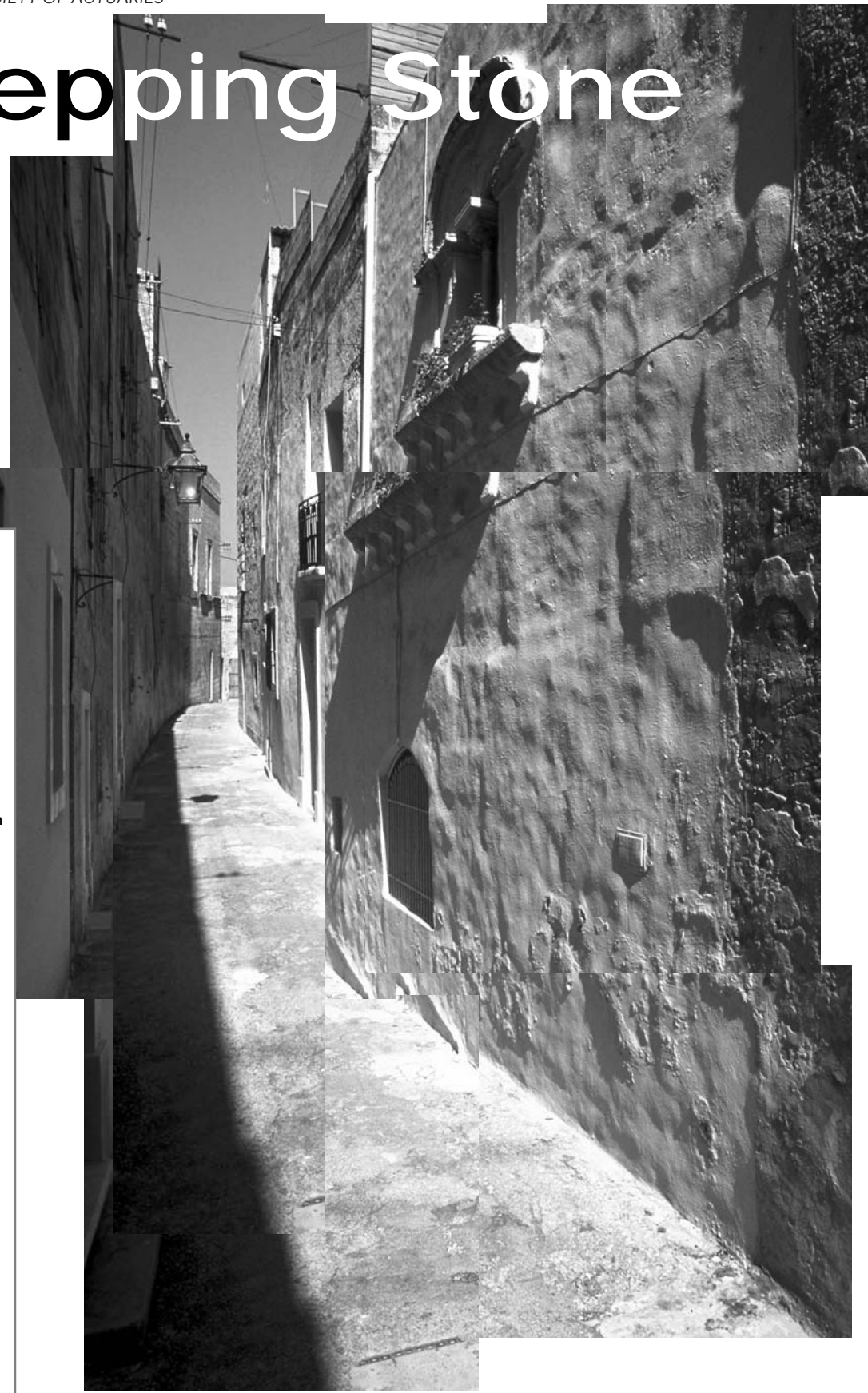
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## From the Editor

# Being a Navigator

by David C. Miller

It's that time of year—a time of reflection and goal setting. One of the most powerful things you can do for your career and life is to set clear, powerful goals. Otherwise, you leave things to chance.

Are you a passenger, controller or a navigator? Would you go rafting down a river without any oars to navigate your direction and get to your intended destination? Without goals you are, in essence, making a decision to ride passively and let the “river of circumstances” take you, your practice or career, and your life wherever it wants.

You can go to the other extreme and try to control life's events. Like trying to make a river flow a certain way, this is an exercise in futility. We can't control the majority of life's events!

However, we do have control over certain things, such as what we believe and how we respond to life's events. As we take responsibility in these areas, we are stepping into our role as navigator. In order to navigate we need to set a direction and identify a destination. That's where goal setting comes in. Here is a five-phase plan to setting goals for 2006.

### Phase 1: Reflect on 2005

Ironically, one of the first things that often helps to set goals is to first look back. Here are some questions to ponder as you look back at 2005:

- What were your biggest wins?
- What was the most valuable lesson you learned?
- If you had to describe the theme for 2005, what would it be?
- What was your biggest disappointment last year?

### Phase 2: Envision Your 2006

Here's where you define the destination. Imagine yourself 12 months from now at the end of 2006. What do you envision yourself accomplishing at that point in time? It's helpful to identify various categories to set some goals that you want to achieve for next year. For example, in your career you may want to think through some of the following categories:

- Maximize new sales/clients
- Support existing clients
- Create more impact in my organization
- Upgrade my leadership and management skills



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- Manage costs
- Create an empowered team
- Implement systems to leverage work flow

Identify personal categories as well, such as:

- Physical health
- Financial well-being
- Emotional strength
- Relationships—spouse, children, friends, etc.
- Spiritual health

Once you have your categories, envision where you want to be in all these areas at the end of the year. For example, you may want to lose 10 pounds and start a consistent exercise regime. You may want to increase sales by 20 percent. Think through all these areas and ask yourself what it would be like to achieve these goals. How would it feel? What else would make it “delicious”?

### Phase 3: Set Performance Goals

The goals you set in your categories are most likely end goals in that they define your destination. And in many cases, you don't have 100 percent of the control for achieving them. In this phase write down the practices and behaviors that will support arriving at these goals, i.e., performance goals.

Unlike end goals, with performance goals you have 100 percent control in seeing them to fruition. These are the actions and behaviors that, if practiced consistently, will dramatically increase the probability that you'll get to your end goal. For example, let's say you want to increase your client base by 20 percent (end goal).

A performance goal to help get you there is to speak to groups of qualified prospects at least once per month (performance goal).

Remember: End goals provide the inspiration while performance goals provide the specification.

### Phase 4: Who Would You Need to Be?

In this phase, ask yourself the following:

- “What qualities do I need to bring to the table to make this happen?”
- “What do I need to dial-up in order to get to these goals?”

If you want to do what you did last year, it's not going to require anything materially different from you this year. But if you're looking to grow and change in 2006 and play a bigger game, it will most likely require courage to move outside your comfort zone and take more risks. Reflect on the list of characteristics and qualities that will need to show up this year for you to get where you want to be.

### Phase 5: Implement a System

If you want to make sure your goals become a reality rather than a pipe dream, you'll need a system of weekly planning to make sure you reach your destination. For more on how to do this, see my article on “Outcome-Focused Planning,” which is in this issue. □



## Take a Look Back

by Jennifer L. Gillespie

It strikes me that we focus quite a bit of energy on setting New Year's resolutions, but we don't take nearly as much time to look backward. I challenge you to look back over the last year and think about what you've accomplished and how you've developed. Be sure to think broadly and give yourself credit in many areas: Did you learn about a new product, like Medicare Part D? Did you improve a process, say Sarbanes-Oxley reporting? Did you take on a new role, like Enterprise Risk Manager? Did you train a new actuarial student? Did you pass an actuarial exam or receive your credentials? Did you adapt to the culture of a new company? Did you make a presentation to a new type of audience? Did you make progress on your work/life balance? I'm sure you can find many signs that you are moving forward. However, if your personal progress list is shorter than you'd like, or if it is too focused in one area, you may have uncovered some goals for yourself for the upcoming year.

It is the goal of the Management and Personal Development Section to provide you with tools for building your personal progress list. First of all, there are great articles on a variety of topics in each issue of *The Stepping Stone*. I think each of us can take away specific information or approaches that are immediately useful whenever we read a new issue. We will continue to recommend great speakers on topics like effective negotiating techniques, navigating corporate politics or enhancing your presentation skills for SOA events. In addition, during the next year we plan to participate in bringing you sessions during the SOA meetings on topics including, but not limited to: Effective Leadership, the Personal Actuary, understanding and applying Myers/Briggs analysis, and a hands-on approach to presentation skills enhancement.

As I complete my year as chair of this section's council, it is a good time to look back at what the section council has accomplished together during that time. We continued on the path of collaborating with other sections. With all the recent research pointing out the gap in "soft skills" between what employers want and where actuaries are, such opportunities have increased. We have worked collaboratively on SOA meeting sessions, on Webinars and on stand-alone technically focused seminars. We hope that meshing information sharing on a technical topic with communication skill building will help actuaries move forward in their career development. During the last year, members of this council have also contributed to the work of the Image Campaign and supported the work of a Board of Governors task force on business skills. While we still have a long list of things we'd ideally like to be able to deliver to our membership, I think we can proudly call it a successful year. Thank you to everybody who supports the work of the Management and Personal Development Section! □



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**With all the recent research pointing out the gap in "soft skills" between what employers want and where actuaries are, such opportunities have increased.**

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# Using a Retained Executive Firm: From the Company Perspective

by Richard Dannenberg

**I**magine: You have just lost one of your key people to a competitor, or you have just been promoted and you need to hire your successor. There are no qualified internal candidates to be considered. You are told that you can use an outside recruiting firm to fill the position. Now you have to decide: which firm and what type of approach? How do I find this person in the most cost and time effective manner? Most business professionals know that when it comes to using an outside recruiting firm to identify top talent there are two business models from which to choose: contingency or retainer. Each approach has certain characteristics that should be considered in determining which approach is right for you. The following is a brief summary of each model:

#### Characteristics of contingency search:

- Contingency firms are generally used for entry-level to mid-management roles.
- Typically the fee is 100 percent contingent upon the successful hiring of a candidate presented by the firm.
- Contingent search is generally not an exclusive arrangement; the hiring authority is free to work with as many recruiters as it likes.
- Contingent search tends to be less oriented toward candidate assessment and "fit" and more toward the generation of resumes put in front of the hiring authority.
- Candidates presented may be marketed to other companies by the contingency recruiter.
- Contingency firms do not guarantee that they will work on a search until it is filled.

They decide how long they will work on a position based on the likelihood of making a placement.

- Fees generally average between 25 percent and 30 percent of first-year compensation.

#### Characteristics of retained executive search:

- Retainer firms are generally hired for more senior level or strategic roles.
- The search contract in terms of deliverables and fees is negotiated up front and paid in installments throughout the course of the search. The search firm is contractually obligated to work on the position. The search firm fee is paid whether the position is filled or not. Placements are guaranteed for a period of one to two years. If the candidates leave of their own accord during the guarantee period, the search firm will conduct another search to replace them with no additional search fees.
- Retained search is an exclusive arrangement between the company and the search firm. If the company accepts resumes from a contingency firm during the retained search, it may find itself liable for another fee on top of the one paid to the search firm.
- Prior to the commencement of the search, a retainer firm will visit the client and meet with those responsible for making the hiring decision. This provides the search firm with additional selection criteria because the search firm will interview potential candidates in person prior to the client interviewing them.



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### Using a Retained Executive Search Firm... • from page 5

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- If requested by the client, the search firm will conduct in-depth background/reference checks on the finalist candidates.
- Candidates recruited for your specific position are for you only. They are not marketed to other organizations.
- Senior level candidates know the difference between contingency and retained search firms. Companies that retain a search firm to represent them to the candidate population send a message regarding the importance of the position as well as their commitment to finding the best talent.
- On average, a retained search firm will present a slate of three to five prescreened qualified candidates for the company to interview on site.
- Fees average between 25 percent and 35 percent of first-year salary plus expenses. Some firms offer a flat fee approach versus the variable fee.

If the decision is made to use the retained search approach, how do I now select the firm that is best qualified to find my person?

- One of the easiest ways to identify the right firm is to talk with your peers regarding their experiences with search firms, whether as a candidate or as a consumer of their services.
- The Directory of Executive Recruiters offered by Kennedy Publications is an excellent tool for the identification of search firms and their areas of expertise.
- Check with your human resources personnel for firms they have used and the results they obtained. Another question to ask yourself: Do you want to use a large generalist firm or a boutique firm? There are

advantages and disadvantages to each type of firm.

Once you have identified several firms, check their Web sites and then contact the head of their insurance/financial services or actuarial search practice. Ask about the firm, its expertise, its search process and fees. Provide them with a general overview of the type of person you wish to hire and inquire as to how many searches they have conducted for similar types of roles. Have the firms submit written proposals that outline their process, deliverables, fees, search cancellation clauses, guarantees and their "off-limits list." This client list is extremely important. If a prospective firm has your direct competitors or companies listed as clients, they will be limited in terms of where they can source candidates for you.

Once you have received and reviewed the proposals, invite your top two choices to your offices so that you can interview them as you would a prospective candidate. Get to know them in person. Remember, this firm will be representing you in the marketplace in which you operate on a daily basis. You want to meet the person(s) who will be responsible for helping you hire the right person. Also, remember that while you are interviewing them for their abilities, the search firm is interviewing you to determine what type of client you will be. A quality search firm will not take on a search assignment if it feels the client does not have a clear understanding of the position to be recruited for or if the client does not appreciate the retained search process.

After you have selected a firm, have the firm send you a contract for review and schedule a date for the search team to come out and pick up the search. Make sure that the person who is running the engagement will be interviewing

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## PEOPLE MANAGEMENT

the final candidates and is the same person who was out during the initial presentation.

Now that you have engaged the search firm, there are certain steps that a company can follow to ensure a successful search:

- **Communication.** Set up weekly updates/status reports with the search firm.
- A successful search is a shared responsibility. Once the search firm has presented its slate of candidates, it is the company's responsibility to manage its internal interview process and provide the search firm with interview feedback in a timely manner.
- Be open to the search firm's suggestions if the firm identifies market issues that may have an impact on the successful conclusion of the search.
- Should you have any questions or problems with the manner in which your search is being conducted, alert the recruiter or the managing partner of the firm. A quality firm will respond immediately. They want to preserve the relationship and be called back for your next search.
- When the final candidate is selected, work with the search firm to craft the compensation and relocation package. There is a distinct advantage to having a third party help to facilitate these often highly sensitive and, at times, emotional discussions.

Now that your offer has been accepted and you have a start date, there is a great sense of relief. You thank the search firm's recruiters for their effort and they thank you for your role in the process. It is a mistake to think that the search is over at this point. In my opinion, the search is completed when the selected candidate shows up for the first day of work. Organizations do not like losing their best talent, and in today's competitive work environment, it is not uncommon for someone to

receive several counteroffers, even after giving notice. Therefore, it is critical that both the new employer and the search firm stay in frequent contact with the selected candidate.

Even after the selected candidate has begun work, a quality search firm will stay in touch with both the company and the candidate. The purpose of this is to make sure both parties' expectations are being met. This also helps to reinforce the relationship between the company and the search firm.

As was stated at the beginning of this article, when you need to identify top talent in a cost effective manner, you have options. Whatever approach you decide to use, it is important to select an organization that understands your business, that has your best interests at heart, and that has the knowledge and expertise to represent your opportunity in the marketplace. Remember, the recruiting firm you select is an extension of your organization.

In the next issue of *The Stepping Stone*, we will discuss the interaction between the candidate and a retained search firm. □

**Author's Note:** This article was prepared by Richard Dannenberg, founder of R.A.D. Search LLC, a retained executive search firm that specializes in the recruitment of senior level actuaries.

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# Development, Dysfunction and Death

by Steven J. Gaspar

## A Parable

She had succeeded in virtually everything she had attempted, until now. Failing was something distant and foreign to Janet Zantmoer, who had breezed through the credentialing process to become a Fellow of the Society of Actuaries in only three years. She had also nailed every technical assignment that had been sent her way. But now Janet was faced with a new kind of challenge, one that she could hardly identify, let alone overcome. She did not know what exactly was going wrong. But she did know one thing: Her new team of actuaries was costing more and accomplishing less than any other in the company. Her team was failing, and as its leader, so was she.

What you have just read is an amateur attempt at the writing style of Patrick Lencioni, author of several best-selling books on management and leadership. His expert use of the parable draws the reader into his books quickly and, once there, the pages keep turning. More important than his ability to entertain is his knack for providing crystallized applicable information—the concepts are both easy to understand and easy to apply. Lencioni's recipe is simple: (1) describe a near-enough-to-real-life business drama that includes a problem caused by a lack of leadership, (2) allow the main character to solve the problem so the reader has the satisfaction of closure (not to mention a demonstrated solution), and (3) outline the hows and whys behind Lencioni's theory for that leadership principle. This latter part, summarizing the key points in the back of the book, makes Lencioni's work particularly handy for future reference.

## Development

One characteristic common among high-performance leaders is that they take responsibility for developing themselves. Top leaders, like top athletes, are continuously working on

their game to make sure they maintain an edge over the competition. Self-development is achieved through a variety of activities including taking on stretch assignments, attending seminars, reading books on leadership, etc. In early October 2005, I had the opportunity to listen to Lencioni at a conference and to meet him afterward. In person his energy is contagious. In print his insight is lucid. Lencioni's company, The Table Group ([www.tablegroup.com](http://www.tablegroup.com)), provides consultative services to corporations to build stronger leadership teams, among other things. Several of his books are mandatory reading for any new manager and highly recommended for the seasoned leader. At worst his books give positive reinforcement to habits you may already have, and at best they provide a basis for developing strong leadership skills. This article is the first of a two-part series in which I will review Lencioni's books that are currently in print.

## Dysfunction

Most of us can think of teams we have led or have been part of that were truly great. I can. We were more than the sum of our parts, and we were energized by simply being with each other and by the things we accomplished together. I can also recall some painfully dysfunctional teams and the wasted time and money that resulted. In *The Five Dysfunctions of a Team*, Lencioni leads us through the challenges faced by savvy leader, Kathryn Petersen, who inherits a new team that has significant problems. We watch as Kathryn makes deliberate moves to repair the team, dysfunction by dysfunction, and we learn of the essential steps to building a high-performance team. When I first read this book I could put real names to the fictitious characters on the team, which I am now learning is common for Lencioni's readers. Moreover, it was by relating real people to the characters



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Self-development is achieved through a variety of activities including taking on stretch assignments, attending seminars, reading books on leadership, etc.

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that I could see how I had failed in leading one of my teams. This epiphany was both stinging and liberating. I have since put the concepts of the book to work with great satisfaction and success.

In *The Five Dysfunctions of a Team*, Lencioni suggests that there are five aspects of a team that must be functional for optimal results to occur: trust, conflict, commitment, accountability and a focus on achieving results. In his parable he describes a team that is dysfunctional in each of the five areas, which makes the value of each easier to see. This is the genius—and primary source of entertainment—of Lencioni's writing style. He maintains that his books portray fictitious companies because, as he says, "If I wrote about real companies no one would believe me."

Few would argue with the premise that trust forms the foundation for an effective team. Lencioni discusses in detail how to develop team trust. He further asserts that the five functions are ordered; that is, trust must be present before conflict, and so on. This assertion is easy to support. Have you ever seen conflict without trust? It's called 'fighting,' or at best 'politics.' Creative conflict, however, is extremely valuable in a team and only occurs when trust is present. When teammates challenge each other in a trusting environment, best practices are discovered. Lencioni advocates using trust-based conflict to guide a team to optimal solutions. In his October speech he went further into this concept and offered that the leader must demonstrate "genuine human weakness" as a way to build team trust. "People will walk through walls of fire for a leader if he will admit to genuine human weakness," said Lencioni.

After establishing base trust and a willingness to engage freely in healthy conflict, commitment is necessary for a team to reach its potential. Who will consistently put forth discretionary effort for the good of the team when one or more members of the team is not committed? Not one person, that's who. Each member must share a commitment to that team. But more than committing to the group, team members must quickly commit to the team's decisions regardless of initial opinions. This

practice enables fast and binding decisions rather than backsliding and renegotiating, which is common in some dysfunctional teams.

Once team members trust each other, are willing to challenge each other and are committed to the group, they can hold themselves and each other accountable. Accountability is what keeps the team honest and true to the cause. And it is the team members themselves, not the leader, who are the primary drivers of holding each other accountable. "The most powerful thing we have in our teams is peer pressure," remarked Lencioni in his October presentation. The pressure to not let the team down can provide strong motivation for high performance.

Being focused on results is another clear winner. Effort is nice, but results matter. The team that has trust, conflict, commitment and accountability, but does not achieve results, is simply a lively social gathering, not an effective business team. The team that measures its success on achievement of results is a team that is relevant to an organization.

If I had to pick just one of Lencioni's books for a new team leader, *The Five Dysfunctions of a Team* would make the short list. The concepts are difficult to dispute and easy to apply. Further, if you have an underperforming team, the chances are good that it is dysfunctional in one of these five areas, most commonly in the area of trust.

### Death

*Death by Meeting* is another excellent book by Lencioni. I routinely recommend this to business colleagues. The concept that we attend enough meaningless meetings to be fatal resonates with most people. The response invoked by merely mentioning the title suggests that there may indeed be a better approach to meetings than that

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# Tomato Management 101

by Dave Duncan

I received the following e-mail from a former employee late last night:

“Dave, I received a verbal offer from the company where I was interviewing. As always, I want to thank you for your assistance. You are the sole person that gave me confidence to go after things like this. I would probably still be working for [Joe] if you had not come along a few years ago. Once again, thank you for everything.”

**W**ow, what a note and reward for me, as this person’s former boss. What did I do so special to deserve his complimentary note to me at 11:00 p.m.? In a nutshell, I invested in someone and that investment paid handsome dividends. And those dividends helped me achieve the results for which I was hired as well.

As leaders and managers, we have results to achieve. To get those results, we have to do the right things. Those “things” include the management and deployment of our resources. Since our human capital makes up perhaps 65 percent of a typical resource budget, it makes logical sense to focus on getting the best returns from your people.

## Lessons Learned from my Tomato Plants

I actually learned a lot about management from my tomatoes this year. The analogy between my tomatoes and your people will be obvious.

In mid-May I decided to grow some tomatoes. Without a natural green thumb, I knew that this would be a challenge. However, I took this approach:

### #1: Identify the best and act on it

I went to the outdoor garden section of Home Depot and found what I believed to be two tomato plants with the greatest potential. They weren’t the most visible on the shelf. They weren’t the tallest. They didn’t have the most leaves. They were actually a little wilted, but it was because the tomato plants above them were blocking all of the sun and hogging the water. But I identified them as having the greatest potential. Total cost: \$1.49 for the plants and \$1.79 for a gallon of gasoline to get there and back. Most of the cost was related to the soft costs of time & effort. I made the best decision. Lesson—make the best decision based on the information at hand. A decision with 70 percent confidence based on 70 percent of the information is better than no decision while I wait on 100 percent of the information.

### #2: Take time to learn from the experts

I had the plants. Now what? Since I am not an expert at growing practically anything, I called my Dad. His tomato plants practically take over his back yard every year. Dad told me everything that I needed to know and I followed his instructions—find enough sunlight, dig the hole, plant deep so that roots can grow, fill the hole with the right soil, fertilize and water. If you don’t know what you’re doing, study the professionals. Lesson: Take time to read and listen—and then act!

### #3: Create and nurture a productive environment

I set specific goals. I wanted to pick my first tomato by July 4th. I wanted to bear fruit



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**If a \$1.49 tomato plant can create a limitless return, what potential do all of us have with our human capital?**

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through the fall. I wanted to reap enough tomatoes on my investment to justify the investment of time and money. So I checked on my plants often, to see if they were on track. I didn't just give them an annual performance review—we had feedback weekly! I watered. I followed through. I did everything humanly possible to provide an environment that would encourage growth. I knew that without growth, I would reap nothing at the end except for a dead hole in the ground. Lesson: Create the right conditions.

#4: Kill all bugs before they do permanent damage

Weeds have a way of choking the life out of plants, so I weeded. Often. Dead branches take up valuable resources, so I cut them off the plant. Bugs in my garden tried to eat away at these top plants and their fruit, so I killed them. The ground had a high clay concentration, so I watered them religiously. Is anything bugging or choking your top performers? Lesson: Kill the bugs and weed out non-performers.

#5: Use your limited time and resources wisely

One plant outgrew the other. I put Miracle Grow on both plants, but for some reason one plant did much better than the other. Initially, both were great plants. Both had the same benefits offered to them. But one took hold, grew and produced much more than the other. Guess which plant got my full attention? The best one. If you spend your time on the less fruitful, you'll kill the other. Lesson: Distinguish and reward consistent performers for their growth, production and results.

#6: Enjoy the harvest

Yesterday was Oct. 20, 2005. I went out to my two-plant garden and saw that four tomatoes were growing on the smaller plant. All four of those tomatoes were still green and very small.

On the larger plant, however, I picked off 15 big, juicy, ripe tomatoes. 15—in one night—in late October. I ate a fresh tomato that night with salt and pepper. Tomorrow, I plan to put fresh tomatoes on my pizza. On Saturday, I'll have a BLT sandwich for lunch. A hearty bowl of chili made with fresh tomatoes on Sunday sounds fantastic. I am going to enjoy the fruits of my labor. Lesson: Expect and enjoy the results of your work.

I found out that one tomato plant has the potential to bear fruit to over 100 tomatoes. I cut open one of the tomatoes and counted the seeds. Did you know that each tomato has approximately 100 seeds? If one plant grows 100 tomatoes, each with 100 seeds, I have the potential for another 10,000 plants.

Tomatoes can't talk. Tomatoes can't spell. Tomatoes can't think. Tomatoes can't sing. Tomatoes can't write. Tomatoes can't use a computer. Tomatoes can't charm anybody. Tomatoes can't do anything. They're just dumb tomatoes. If a \$1.49 tomato plant can create a limitless return, what potential do all of us have with our human capital?

I really enjoyed getting that e-mail last night. It is so satisfying to see this person grow—what a reward to me as his former manager! During the time that he worked for me, he bore a tremendous amount of fruit for me which in turn helped with my own success. Want my best guess? Someday I'll be working for him and my investment in him will really pay off!

How is your yield? Mine could be better, but I'm still learning. Next year, I'm trying my luck with corn. Do you know how many kernels are on each ear of corn? □





# Aligning Tasks to Gain Maximum Advantage

by Vincent J. Granieri

## Summary

In the annals of athletic performance enhancement or physical therapy, research suggests that alignment of the skeletal system through a combination of training, stretching and therapeutic massage of the muscular system will result in higher performance levels and better overall health. We also now know that upsetting the balance or alignment often causes problems that seem unrelated, but are really a result of misalignment as other parts of the body try to compensate for it.

This same concept of alignment is a vital key to managerial success as well. By integrating and aligning seemingly disparate activities, great gains ensue due to consistency of approach and economies of scale. This can occur at the personal level and at the organizational level. In this two-part series, we will explore the benefits of alignment at each level. In this first installment, we will examine the benefits of linking personal goals, prioritization and performance management. In the next issue, we will follow up with a study of gains through linking pricing, forecasting and reporting at the company level.

## The Maladies of Misalignment

Time is something we all want more of, yet everyone has as much as there is. The key then is to use the time we have to its best advantage. A good example is the dreaded annual performance review. If you are like me, your tendency is to evaluate performance (your own or others) annually at most. While some companies perform evaluations on the associate's hiring anniversary, others perform all evaluations at

the same time, usually corresponding with the end of the company's fiscal year. Even those who use the anniversary date often pay incentive compensation based on the fiscal year. For financial actuaries, this period is the busiest time of the year. It's difficult to remember everything that occurred during the evaluation period since it began a year ago. The path of least resistance for actuarial managers is to shortcut or delay the evaluation process, which has far reaching negative consequences. Either approach is an indicator of poor people management, but there are also morale issues associated with poor performance evaluations and/or negative surprises that arise therein. Further, these actions may well heighten emotional pressures at a time when ambient pressures are already too high. As much as we would like to change the timing of the process in these instances, that may not be realistic.

How do we go about modifying the system to make it work for us as managers and not against us? The solution is to align goal-setting, prioritization and performance management into an integrated process. Before we get too far into this, let me reassure you that this is not analogous to combining all the kitchen tools (the blender, the grinder, the food processor, the mixer, etc.) into one tool that takes up less space but doesn't perform any of the tasks particularly well; our goal is to improve each tool through integration, not to compromise it.

## The Planning Process

We began this discussion at the end of a planning/evaluation cycle, when it is too late to do anything but live with the consequences of past



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**How do we go about modifying the system to work for us as managers and not against us?**

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decisions. Let's journey back to the beginning of the fiscal year, or even a little before then, to the middle of the planning process. A typical goal of the planning process is to develop objectives for the company. If we are interested in perfect alignment, we do not stop there. Each division or department can develop its goals to line up behind the corporate goals. Each work group can align its goals with the departmental goals and each associate can develop his or her individual goals to support the goals of the work group.

Questions arise regarding whether repetitive work, such as preparing financial statements or performing cash flow testing, belongs on the objectives list. It is important that all tasks with-in reason are included because the goals document forms the basis for all that will follow.

### Prioritization

This is perhaps the most difficult part of the integrated advantage. It's been said many ways; for example, it's not about doing things right, it's about doing the right things. Let me suggest that it's definitely not about to-do lists, at least the traditional endless variety where no task stands out above another. The traditional to-do list is focused on the present and is lacking key information on prioritization. There are numerous prioritized to-do list models that encourage assigning letters and numbers to highlight the most important activities. For example, an 'A' task is of higher priority than a 'B' task and an 'A-1' is more important than an 'A-3.' This is an improvement.

I use a spreadsheet that I call "an integrated approach to priorities" (IAP) that includes

active tasks like a to-do list, but I take a different approach to it. A task cannot be active unless it meshes with my goals and for which I have adequate resources to accomplish them. Put another way, active tasks are those that are able to be worked and are being worked. So where do all those tasks from the traditional to-do list go? Possibly, they go into one of five additional categories on the IAP. A subheading of active tasks, dependencies, includes those active tasks where I am waiting on someone else's input or have delegated a critical assignment. Also on the sheet are two inactive task categories, backlog, for those tasks deemed worthy, but for which resources do not currently exist, and exploratory, for those potential tasks that have not yet been approved, but need to be judged before they are placed in backlog or active. There is also a category for repetitive tasks, those that are repeated periodically throughout the year, such as financial reporting.

Finally, there is a category for completed tasks since the last update. I update my IAP weekly or biweekly. This category is a key to aligning priorities, goals and performance evaluations, as will be seen below. Another key aspect of the IAP is that there is a deadline date listed for each item on the spreadsheet and a reference to the goal that it supports.

(continued on page 14)



The form of the tool is not the most important thing. It's the consistent reassessment of capacity and priorities that is critical. The active tasks list must only include those tasks that are being worked. Once on the active list, they are completed or replaced by backlog or exploratory tasks that are deemed more beneficial to the goals. Any changes are negotiated between affected parties.

### Performance Evaluation

Assume that the prioritization cycle has repeated itself through many weekly or biweekly cycles. In each cycle, tasks move from active to completed, new tasks appear on the exploratory or backlog lists and move to the active or dependencies lists and then to completed. Dates are met and dates slip.

It's now time for an evaluation. What I (and my boss or subordinate) now have in front of me is a stack of IAPs in chronological order that documents everything related to assigned tasks that were performed over the evaluation period. With the references to goals embedded in the system, it is easy to measure progress made toward each goal and whether it has been accomplished. Along the way, there has been plenty of time to adjust for the unexpected. Most importantly, these adjustments take place while the facts are fresh in everyone's minds, not months after the fact. Accordingly, there are few surprises, if any.

### Conclusion

The benefits of aligning goal-setting, prioritization and performance evaluation are evident. Why don't more managers reap these benefits? It all comes down to discipline and desire. The costs are up front and the benefits are down the road. If you weigh the costs and the benefits, however, you will see that time spent today

saves exponentially more time tomorrow when time is at a premium. Next issue, we will explore how this principle can be applied to corporate activities as well. □

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**With the references to goals embedded in the system, it is easy to measure progress made toward each goal and whether it has been accomplished.**

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which is most commonly employed. This book looks at why meetings are typically ineffective and makes recommendations for simple but effective improvements.

Death by Meeting uses the tried and true format of the fable. In this story an unlikely hero arrives to save Yip Software. Will Petersen is a temporary employee with a condition that resembles Tourette's syndrome. His disorder is expressed by an occasional tendency to blurt out whatever he is thinking. Most of us have worked with people like this, which makes relating to the story very easy, not to mention amusing. Lencioni uses this characteristic to create tension (you never know what Petersen will say) and to move the plot along quickly.

One key problem, argues Lencioni, is that we abuse our meetings by using the same forum (often the staff meeting) for multiple purposes. Strategic issues are readily discussed alongside tactical or even trivial issues. "This is like having the following conversation with your spouse while you're getting ready for work one morning," said Lencioni in October as he acted out brushing his teeth. "What do you want for dinner tonight? Hey, did we decide where we're going on vacation this year? Do you like this tie? I think we should move." This is similar to discussing product placement strategy in the same meeting as the company picnic. This "meeting stew" as he calls it generates frustration, confusion and inefficiency by giving equal billing to issues that have significantly different value to the company.

Lencioni's remedy to a fatal dose of ineffective meetings is to categorize events by purpose: daily check in, weekly tactical, monthly strategic, and quarterly off sites. He believes there is value in having different meetings for different purposes, and he recommends that discipline to the stated purpose to be maintained. Parking lots for ideas are utilized to maintain the integrity of the meeting. As with most business texts, I find the recommended recipe close, but not perfect for my situation

with my teams. However, many of the concepts are viable.

Lencioni identifies another problem with most meetings—they're boring and they don't have to be. In fact, he argues that meetings can-be-should-be-must-be productive, interesting, and maybe even exciting. I agree with him. The most memorable meetings I have held or attended were those wrought with conflict and heated debate. However, the meetings resulted in decisions and actions. And, the debate was steeped in trust, which brings me to a common thread between Death by Meeting and The Five Dysfunctions of a Team: the clear need for trust and open constructive conflict. Once again, Lencioni offers that trust is required for conflict, and conflict is required for discovery of the best answers. Conflict in meetings is the honey that attracts the bees of the participants' attention. This conflict makes the meetings interesting and invigorating. But as illustrated by The Five Dysfunctions of a Team, conflict without trust is destructive rather than constructive.

One reaction to Lencioni's work is "Much of this is common sense." While I can relate to that sentiment, I still find great value in reading Lencioni's work because it is one thing to see that something makes sense and quite another to put that common sense into action. Patrick Lencioni does the work of translating that common sense into actionable items that provide the basis for developing leadership skills.

In the next issue, I will review The Four Obsessions of the Extraordinary Executive, The Five Temptations of a CEO and a give sneak peek at Lencioni's next book on silos and turf wars.

□





# Creating Your Vision

by Gerry Fryer

**T**his article is about how to develop vision statements, which are fundamental to the future of any entity. It will start with the visions of organizations and move on to how individuals might begin to create their own vision statements.

Visions emerge from ideas. For example:

“We choose to go to the moon in this decade and do the other things, not because they are easy, but because they are hard, because that goal will serve to organize and measure the best of our energies and skills...”

“Toastmasters International empowers people to achieve their full potential and realize their dreams. Through our member clubs, people throughout the world can improve their communication and leadership skills, and find the courage to change.”

“I have a dream that my four children will one day live in a nation where they will not be judged by the color of their skin but by the content of their character.”

Vision statements are at the core of strategic planning. Organizations and political parties, even nations, develop their visions to launch themselves into the future. They answer questions like these:

- What are we trying to achieve?
- Where would we like to be in 10 years?
- What do we want to become?

Once it creates its vision, organizational management can develop long-range plans with strategies and goals, including location planning and staffing and systems plans. Within that framework, short-term plans enable the organization to operate on a day-to-day basis.

A vision needs to soar and to touch people in a profound way. A great organizational vision, such as the Toastmasters vision above or the GE vision of some years ago—“Progress is our most important product”—has the following characteristics:

- It talks about the future and about possibilities and direction
- It is a compelling and memorable statement
- The vision is inspiring to those who hear it and galvanizes them into action
- It is inclusive and makes people feel that they are part of something larger than themselves
- The speaker of the vision feels transformed

What is included in a vision statement? Usually the major focus is in one area. First is Excellence. A prime example of this is the quest to reach the moon within a decade as set out by President Kennedy. A second theme is Helping People. That is what the Toastmasters vision is all about. The last possibility is Building a Better World, which is the essence of Dr. King’s “I have a dream” speech.

The most powerful visions resonate through history or set the stage for a lifetime of meaningful personal activity and growth. Here is



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one possibility: “As a business owner, I am going to accumulate sufficient assets in an ethical way so that I can retire at the age of 55 and devote the rest of my life to family and philanthropic causes.”

Creating a personal vision is not a trivial endeavor. A major part of the exercise is to perform a strategic self-analysis to discover your own strengths, values and weaknesses, as well as the opportunities and threats that exist in the environment. This takes an investment of time and resources; but without a vision, you probably are allowing others to determine the direction of your life from that point forward.

Writers on leadership and human potential point out that people with a powerful vision are more likely to succeed than others.\* Even the self-analysis that begins the process has great standalone value. The vision may begin and end with your own fulfillment, or it may be directed outward toward building a better world.

Now I invite you to start the process for yourself. Choose a timeframe and think about your unique definition of success. Here are seven powerful questions to start you on the path to developing your personal vision statement.

1. What am I really good at doing?
2. What do I love to do?
3. What am I interested in learning more about?
4. What are my core values?
5. What were the two most fulfilling things I did during the last seven days?
6. What is the one thing that is missing in my life that I can do something about?
7. What do I want to become?

There are many resources available that will help you with the self-analysis process and to answer the questions above. These include books, seminars, Web resources, mentoring and personal coaching. A coach will support you both in developing your vision and then with its implementation.

When your vision is first created, how do you know if it is the right one for you? Surprisingly, the answer to that is easy: If the words in the vision, and the pictures and feelings that they evoke, are so compelling that you feel you must immediately take action in order to begin to make them become real, then you and your vision are one.

The grand task of realizing your vision is up to you: “If it’s to be, it’s up to me!” You have the dream, you have created it, and it’s one you want so badly. Now you can develop the strategies and action steps to bring it to fruition. □

\* See, for example, [http://businessknowledge-source.com/blog/will\\_and\\_vision\\_000573.html](http://businessknowledge-source.com/blog/will_and_vision_000573.html)



# Outcome-Focused Planning

by David C. Miller

Is effectively managing your time a challenge for you? Do you feel like there aren't enough hours in the day and that you just don't get to those things that really matter? If so, you're not alone. Effective time management seems to be a common ailment among professionals and a place where there's always room for improvement. Next to having a resourceful psychology, having a solid system of planning is one of the most important traits of a successful professional.

Most people approach planning starting with a to-do list. They put their list in some sort of day planner and start going at it, checking tasks off as they complete them. What usually happens is that most of the list moves from one day to the next with more things being added to the list than tasks being checked off. What a formula for total stress!

This is what I would call "to-do"-driven planning or a bottom-up approach. It's better than doing no planning, yet it's not the most effective when it comes to managing your business or career. A better way is to use a top-down approach or outcome-focused planning (OFP).

Rather than planning my week (and I recommend weekly versus daily planning) based on a lot of things I need to do, with OFP I'm focusing on what outcomes or results I want to achieve this week. Isn't that what we really want—the results—not just to do a lot of things?

Focusing on outcomes rather than "to-dos" has several advantages:

- It helps you focus on activities that are in line with your strategic plan and goals,
  - It's easier to think about how to spend your time. Instead of trying to keep track of 50 action items, you're thinking about four or five outcomes,
  - You're more likely to actually achieve the outcome with this approach, and
  - You'll find that you don't have to do everything on your list to get the outcome you desire.
- The last point is really an important one: When you focus on to-dos, you feel like you need to do them all or you haven't really achieved the goal. It's total freedom to realize that you may only have to do a fraction of the tasks to get 80 percent or more of the result you want.
- This approach is top-down because everything flows from your vision for your business:
- Vision => Goals => Weekly Planning (Outcomes) => Actions => Realized Results
- The steps for this approach are fairly simple:
1. When planning your week, think of the four or five outcomes that would help you make progress on your business goals.
  2. For each outcome, brainstorm action items that will help you achieve that outcome.
  3. Put an asterisk next to the MUST ITEMS—the ones you want to make sure you absolutely do. Say you have eight action items, you might designate three of them as MUST ITEMS—these will give you



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the biggest “bang for your buck” and will probably get you most, if not all, of the way to your outcome.

4. Estimate how much time each task will take. Here’s where the reality check comes in play. Take your best guess about how much time each task will take to the nearest 15 minutes and be conservative—most people underestimate how much time things take.
5. Schedule all your MUST ITEMS throughout the week. Scheduling means designating a specific day and time. If a task takes three hours, you may spread it out (e.g., one hour on Monday at 9 a.m., one hour Tuesday at 2:30 p.m., and the balance on Thursday at 1 p.m.). When you schedule something it becomes a commitment.
6. Manage the results. As you go through the week, new things will come up. When that happens, just recalibrate your plan. The difference with OFP is that you’ll make conscious choices about what tasks move, and you will put it somewhere and not let it get lost in the cracks.

Try using this system to do your weekly planning for 30 days and then evaluate how effective it is for you. You’re striving to play a bigger game; don’t leave your planning to chance. □





# Focus Your Networking for Greater Success

by John West Hadley

**W**hat do you think of when someone talks about networking? Does the term conjure up an image of someone smoothly sliding across the room, shaking hands with everyone, moving quickly from person to person, looking for a good “prospect”? Someone who never really creates more than a superficial relationship with any one person? That’s a common perception. That is not what I consider networking, or at least it’s not effective networking.

I’m a firm believer in the power of networking, and I consistently advise my career search clients that they should spend the majority of their time networking. Effective networking is also critical to shaping your future career opportunities.

It is your network that provides critical resources and information you can tap into. Your network gives you the perspective of viewpoints and expertise outside of your current operation, company or industry that make you more valuable in any discussion. And it is your network that you can fall back on when you are looking for your next opportunity, or that often will bring you opportunities when you aren’t seeking them.

It is absolutely critical that you maintain and build your network at all times, even when you are your busiest and not just when it’s convenient. You want to have a network to draw on whenever you need it and not be caught just trying to rebuild it at a critical juncture! In fact, this is a common trap consultants fall prey to. We get very busy servicing our existing clients, so that our efforts at creating and fostering other relationships fall

by the wayside. As a result, we keep following the peaks in our business with deep valleys, due to the corresponding up and down cycles in our pipelines.

My own experience is that every job I have ever had, plus my consulting practices, arose out of my networking activities. Now, given how vitally important I’m suggesting networking is to your future, you might think that I would advise you to network all the time. That you should look at every meeting as another place to work at expanding and building your network. Definitely not! You should be very focused in your networking activity. Be open to all networking opportunities that present themselves, but also be very selective in what you actually choose to do.

Many people confuse being open to networking opportunities with always being on stage. They are constantly in a selling mode, trying hard to shake as many hands as possible, and in the process actually rub a great many people the wrong way. I remember one recruiter who wandered around a Society of Actuaries conference in a dumpy suit carrying a shopping bag and sticking pens in everyone’s hands. While I kept the pen, his name on it only served as a continual reminder of one headhunter with whom I would never work. This is similar to the person who runs around networking events handing everyone in sight a business card. That is not networking. That’s giving out a lot of cards that are mostly going to wind up in the trash. Networking is about building relationships, and that takes time and effort.



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I've met many people who try to go to a wide variety of networking events, constantly meeting lots of new people. Where they tend to fall down is in relationship building outside of those events. Simply attending many different events doesn't accomplish all that much. It does get you initial contacts, but the point of such events is not to bend someone's ear for an extended period.

That initial contact should just be about establishing some common ground, building rapport and creating interest in taking the relationship further. It's the meetings, e-mails and phone calls in between events that build and ripen relationships into meaningful opportunities. And if you spend a great deal of time and energy attending a lot of different networking events, you may not have enough time left over to do the follow up that bears the real fruit!

As a result, I've severely limited my own memberships in networking groups. Last year a good friend and business colleague invited me to a new networking group that met bi-weekly, and I enjoyed both the people in it and the 'feel' of the group. Afterwards I considered joining. On reflection, I concluded that I could only participate meaningfully in that group if I was prepared to drop out of at least one of the other two business networking groups I attend regularly.

My message to you is to be very selective about your networking. This doesn't mean to stop networking for any period of time. You should make it a habit to be doing some level of networking, or relationship building at all times. Yes, you may do less of it during your

busy season, but even then you need to actively plan some networking activities into your schedule each week. But you should spend a little time planning out which networking activities and events are most likely to help you develop the relationships you seek, or to provide you with the long-term visibility your search or business requires. Then make sure you are allocating enough time and energy to build on those events instead of just attending them. □





# What a Recruiter Wants You to Know

by Alan J. Sheptin

**I**n the 20-plus years that I've been in the actuarial profession, I have spoken to numerous recruiters about a myriad of positions, from consulting to life insurance to reinsurance. Additionally, I've been a user of their services, both when I was looking for positions and when I was searching for talent. However, I have always wondered about their job, and how they go about working with candidates and employers.

I recently had the opportunity to speak at length with Pauline Reimer, Director of Actuarial Recruitment at Pryor Associates in Hicksville, New York. She has been recruiting actuarial talent since March 1986. She is also unique in the field: She is an actuary, an ASA formerly with TIAA-CREF, Equitable and the Segal Company. Our talk provided me with considerable insight and some good knowledge for all of you as well!

## Who does the recruiter represent? The employer or the candidate?

Recruiters represent both. We want to reach a happy medium, as both are users of our services.

## Can a recruiter help a candidate when she/he is looking to expand to a different field within the industry? What can the candidate do to maximize success?

The best way to expand your skill set is to look internally in your current company. If the

opportunity that you want is not available, then you should seek a company where that expertise is available. However, you will most likely need to be hired in your own expertise at the new organization. Get your foot in the door by taking a baby step forward.

Additionally, do things that set you apart. For instance, the CFA exam is a good way to establish credibility for financially oriented roles. Knowing, or learning, a foreign language is important for international positions. Make sure a recruiter knows as much as possible about you professionally, including personal issues that may affect your job search.

## When you make a cold call, what is your expectation?

One of my favorite ways to meet actuaries is at conferences. By attending 12 to 15 conferences annually, I try to meet as many actuaries as possible one-on-one.

When I do make cold calls, I introduce myself as an educator, a provider of service. All I want is a few minutes of your time. I do find that companies with openings are typically more receptive to cold calls than individuals.

## Why would you turn away a company or a candidate?

If I hear a company is about to be downgraded by a rating agency, or a company is on negative watch, or the reputation of a manager is questionable, I am very careful about whom I would place there.



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**Make sure a recruiter knows as much as possible about you professionally, including personal issues that may affect your job search.**

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Likewise, if a candidate has a negative reputation, such as negative references, I would be cautious about working with that person unless she/he could turn it around.

It is important for candidates to have good communication skills. If I am working with an excellent candidate who needs to improve articulation, I have relationships with English as a Second Language professionals to help these candidates better articulate. I also work with communication specialists who help candidates with speaking skills and presentation styles.

If I've met a candidate who needs to improve outward appearance, I've taken the person on shopping excursions to help pick out a tasteful suit or an outfit for an interview.

Appearance and communication are extremely important when meeting a potential employer. You never get a second chance to make a first impression!

### **When does networking prove more beneficial than working with a recruiter?**

If you are looking internally, then of course networking is far more beneficial. Networking can complement the recruiting effort.

While the benefits to a company could be saving recruiter fees, this does not necessarily work to your advantage, as confidentiality could be compromised. A good recruiter knows that confidentiality is the most important element of the relationship.

Students seeking positions at the entry level need to do more of the work on their own. I am happy to help out and make suggestions on how to go about an effective job search.

### **What are the best questions a candidate should ask recruiters before working with them?**

- How many years of experience do you have?
- In which facets of the industry do you have expertise? Which geography?
- What are your credentials?
- Which conferences do you attend each year?
- What is the length of time it should take to get placed? (typically two weeks to six months)
- Which companies have you represented?
- Can you provide references?

Likewise, the candidate should be ready with a copy of a resume. (It doesn't have to be perfect, as I invariably help perfect the appearance of each resume, in terms of grammar, syntax, etc.) The candidate should be active in the search as well. Be sure to tell the recruiter about types of jobs and companies that interest you and what functions/responsibilities you prefer and why. A good recruiter can help get the right contacts for you and also get you the "inside scoop."



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**What are the best questions a candidate should ask an employer about a position?**

- How long and why has the position been available?
- When are you seeking to fill the position?
- What are the ideal qualities of the potential hire?
- What is the growth potential?
- What is the culture of the office?
- Where can this position go in the next two years?

The candidate should stay away from discussing salary and benefits. That is the job of the recruiter.

**Should the candidate be so forward as to ask for the job at the interview?**

No, I don't believe that would be appropriate. However, regardless of the opportunity, always be enthusiastic but never pushy. Even if the job does not fit what you actually want, leave the door open because another opportunity could arise in that company, or they may even customize a position for you if they are very favorably impressed with you.

After an interview, give yourself some time to reflect on the position. The job and/or company may be more attractive to you than you initially thought.

If, after a job interview, the job really interests you, tell the recruiter that you want the job. She/he is in your corner.

**This leads me to a question. ... Can a recruiter successfully "point a job" in a candidate's direction?**

Absolutely! Recruiters have extensive relationships with companies. We know the cultures of the organizations, the personality of the individual and whether the fit will be a good one.

When a candidate is working with a recruiter, the recruiter can and should call the hiring authority as quickly as possible for feedback and is expected to act quickly. A candidate does not have this ability on his own.

The recruiter does have a lot of influence in the process. Based on candidates' feedback from interviews, I have been able to clarify ambiguities, resolve misinterpretations and rectify situations post interview, resulting in the candidates being hired. This would probably not have occurred had the candidates been representing themselves.

**Should a candidate deal with more than one recruiter? What are the advantages and disadvantages to this?**

This answer depends on whether you are presently gainfully employed. If you are unemployed, get to work immediately on finding your next job even if you plan on taking several months off between jobs. Use multiple resources; however, be sure to maintain a list of companies where your resume was sent, which recruiter sent it and the end result.

If you are employed and considering a job change, find a recruiter who is knowledgeable and trustworthy, and give that recruiter a chance to do his or her job exclusively. If you

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**Even if the job does not fit what you actually want, leave the door open because another opportunity could arise in that company, or they may even customize a position for you if very favorably impressed with you.**

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find that you are not getting interviews, or ones that fit your goals, then explore other recruiters. Some companies' human resources departments support different parts of a company. If a recruiter proposes a position in a company in which you were already presented, be up-front about having been presented already and about what happened. It is possible that the departments' recruiting processes are independent of each other, and the recruiter can still present you without any conflict of interest.

### **Any parting thoughts?**

Be aware that there are a large number of actuarial recruiters out there due to the availability of our directory and the fact that the actuarial profession is such a top ranking profession. But note, insurance companies are regulated; recruiters are not. Do your due diligence before embarking on a job search with just any recruiter. You want someone who is trustworthy, knows the market, and is appropriately assertive with good follow up and good follow through. Remember, you want someone in your corner.

A good recruiter should listen to the applicants' likes and dislikes, educate them and help them find a position that fits the bill. No recruiter ever wants an unhappy candidate. The recruiter's reputation is at stake! □





# The Magic of Movement

by James Gray

**Editor's Note:** This article previously ran in *The Globe and Mail*, Sept. 5, 2003 and is reprinted with permission.

**The best speakers around are on the move.**

**C**elebrated presenters like management guru Tom Peters and former U.S. Labor Secretary Robert Reich pace their respective stages, pausing, reflecting, gesturing, their voices rising and falling with the import of their words, their words consistent with their movement, their audiences mesmerized by the choreography.

Wireless microphone technology, which has improved in quality and more importantly, reliability over the last five years, has provided the security for more speakers to roam. Today, headliners on the big time U.S. speaking circuit will, more often than not, take flight soon after they've been introduced.

When they do hit the road, it's magic. Nothing engages audiences like passionate, well-prepared, assured presenters who move in tandem with their narrative. It wasn't so long ago, less than a generation, when business and political leaders delivered speeches as if hammered into place at their lecterns, all stiff and unbending. The resulting scenes—overly formal presenters rendered immobile by logistics and convention—seem immeasurably dated today.

There's a premium now on naturalness and openness, on revealing something of your character as you relate to the audience. It's much easier for most people to accomplish that goal while in motion.

Sweeping movement works in many speaking situations, but not all. Politicians have less opportunity for mobility, for reasons of security

and television's requirement for stable, clean head-and-shoulder shots. Ontario Premier Ernie Eves wouldn't have done well to pad around during his recent, twice-daily briefings on the province's electricity situation, not with TV cameras trained on him from so many different angles.

Besides, Eves was addressing a potentially ominous state of affairs, and the generally accepted rule is: The more serious the situation, the less you should move. While a well-taken walk invariably goes down well at industry conferences, sales meetings and motivational seminars, it wouldn't be acceptable for a State of the Union address, an announcement of employee layoffs or a news briefing on a potential power outage.

Let's take this further: If you're a CEO announcing terrific financial results at your annual meeting, you'll be able to roam with the full endorsement of the assembled shareholders. For bad news, you'd be best to stay put. (Staying put never means staying frozen.)

However, when the occasion is right, it's great to travel. Your 'journey' may be limited to a few steps, or it may be as far-reaching as a sojourn deep into the recesses of a packed auditorium. It doesn't really matter. What matters is that body movement carries with it tremendous power, a sort of inherent credibility that delivers rewards of impact and persuasiveness out of all proportion to the kinetic energy invested.

Confident speakers move. They pause. They smile, forever keeping in mind that their presentation, after all, represents simple human interaction. Speakers who lack confidence repress themselves and their inclination to stir even a modicum. They think: "If I move I'll have to reveal even more of myself!" Exactly.

If you want to be a top-tier speaker, if you want to have an edge, you have to move when the circumstances are right. Here's how.



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### Start Small

The best presenters didn't become great overnight. They learned slowly, over time, how best to leverage body movement in support of their oratory. You can commence your education when the performance stakes are lower, in informal meetings with little career-limiting potential, like a planning session for the office Christmas party. Establish your 'beach head,' with your notes or laptop, at the head of the conference table or lectern. Always stand when presenting to groups of 10 or more, unless it's expressly prohibited by dictum or tradition. Standing provides authority and a take-off point for your walk.

### Establish Your Presence

Don't hit the road right away. Always begin slowly, in speech and movement. Remember that the audience needs to get oriented to you and your message in the early going, so don't overwhelm the crowd with rapid-fire patter and activity. Relax. Introduce yourself (or build on another's introduction of you) calmly and unhurriedly, and then explain to those in attendance why the information you're about to present is important to them. You need to hook the audience before you move or else no one may be watching when you do.

### Learn to Balance

Just the act of stepping a few meters away from the lectern to share an anecdote or expand upon a point communicates poise, panache and personality. (You're saying, in effect: "Hey, I have the confidence to be real.") As you approach the individuals on your route, make eye contact, but don't forget the larger audience; its members will require your attention too. This requires a fine balance—telling your story in an absorbing manner as you walk, maintaining a relationship with those in your path and beyond it, all the while restricting the amount of time each section of the audience views not your face, but your back. That's why you're advised to keep your first trips short. In time, you'll master the combination of content, delivery and movement required to compel your colleagues, clients and customers.

### Expand Your Zone

How do you move when the world so often seems intent on keeping you stationary? How do you possibly integrate action in speeches and presentations when there's no stage to traverse and no wireless technology to free you? Answer: You can expand your delivery zone. If you're confined by the old microphone-on-lectern setup, you can lean slightly forward when accentuating key points. If you have a 'gooseneck' mike, you can move to either side of the lectern (but only after conducting a pre-presentation sound check to ensure your voice will be picked up). For dramatic effect, you can walk silently to a flip chart, and with the audience watching and wondering, print (not write) a number or slogan or term that summarizes your theme.

Ask a question: I was conducting a presentation skills session with some pharmaceutical executives in Florida last year when something in the room distracted me and my mind went vacant. (It will do that on occasion.) There I was, having wandered into a sea of 40 high-flyers, quite lost. Guess what? They didn't notice. I paused, which looked thoughtful, and then asked a question. Several voices piped up with answers that fit neatly into the points I was making and all was, thankfully, well. Life can certainly be more stressful 'in the field,' but the rewards of presenting on the go far outweigh the risks. Besides, if you get stuck, you can always ask a question. Now, when are you going to start moving? □





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