SOA
Creating Meeting Content Workbook

Contents

Overview

Introduction

Welcome to the *Creating Meeting Content* workbook!

This workbook is designed to provide you with a practical, hands-on approach to creating targeted meeting session content that meets audience informational needs. This approach can be utilized for large and small meetings.

The approach presented in this workbook is based on the phases of the instructional design process. The instructional design process is a systematic methodology developed to help users determine informational/educational needs and then create targeted content to meet those needs.

The workbook will walk you step-by-step through the application of the instructional design phases to the creation of effective meeting content. You will learn how to identify your target audience's characteristics and learning styles, design content targeted to your audience, develop and verify the soundness of your created meeting content and finally the practical observational/behavioral measures that you can keep in mind to evaluate the effectiveness of your content.

Worksheets walking you through the different steps are provided throughout the workbook. For your convenience, all of the worksheets are also provided in Appendix B in a printable format.

Please work through this workbook at your own pace from beginning to end.

Also, because your work in this book provides valuable information about the design intentions of your program, please retain this material for future reference.

Your Role as a Developer

Your goal as an SOA subject matter expert and content developer is to identify your target audience's characteristics and learning styles, determine their need for information and then meet that need by maximizing the effectiveness, efficiency and appeal of the session content that you develop.

This goal is achieved by taking the following sequential phases in developing your content

Phase 1: Identify the characteristics and learning needs of your target audience.

Phase 2: Design your session content.

Phase 3: Develop the selected session content.

Phase 4: Evaluate your presentation.

The information gathered in each of the phases lays a foundation for work performed in the following phase.

Phase 1: Analyze your Target Audience

Analysis is the first phase of the content creation process. This phase creates the foundation for all following steps and plays an important role in ensuring that you develop a quality product that meets your target audience needs.

In this phase, you identify your audience characteristics and learning need by defining the following information:

Who is your intended audience?

What do they already know about your topic?

What do they need to know about your topic?

What is their interest level and motivation to participate in your presentation?

What are their characteristics and learning styles?

What information do you want them to take away from your presentation?

If the analysis phase is skipped, you run the following risks with your presentation:

- Your presentation may have a wrong focus and level of detail for your audience.
- Your content may be incomplete, redundant or not the correct content for your audience.

The audience analysis information helps you determine the correct focus and required level of detail in your presentation which you will start creating in the design phase.

Phase 2: Design your Content

After gathering your audience information, you now have an idea of what they know about your presentation topic and the prerequisite information they need to have to benefit from your presentation.

The next step is to create a basic "blueprint" that describes your selected content and the presentation strategy you will use to move your audience from what they already know to what you want them to learn.

A normal tendency may be to skip over this phase and move directly into creating your presentation, however performing this step ensures that your presentation content is cohesive, complete and has the correct focus for your target audience.

In this phase, you basically lay out your presentation by defining the following information:

- What are the goal and objectives of your presentation?
- What are the ideas you want to present (your content topics)?
- What is the best way to organize your topics for clarity and flow?
- What visual aids should be used to support your presentation content (e.g., graphics, tables, visuals)?
- What types of audience interaction/activities you would like to incorporate into your presentation to support the understanding and retention of your content?
- What is the best session format for your presentation?
- How will you measure the effectiveness of your presentation?

Phase 3: Develop your Content

In this phase, you draw on the audience information gathered in the analysis phase and the specifications laid out in the design phase to create your presentation. If you were thorough in the work you did in the previous two phases, development will proceed smoothly.

However, if you were not thorough, as you start developing, you may notice that problems or details that were not identified (or considered) in the previous two phases become obvious. For example, when you start adding details to your presentation, you may realize that your scope is not on target for the audience, additional content may be beneficial to incorporate into your presentation or other resources may be needed.

The main activities you perform in this phase consist of the following:

- Create an initial draft of your presentation.
- Verify the soundness of your initial draft.
- Perform a test run of the presentation and then update your presentation as needed based on the results of your test run.

Phase 4: Evaluate your Presentation

Typically, the SOA includes external online and written evaluations of sessions. This workbook presents you with “internal” behavioral measures of how well your presentation is being received that you can implement by observing your audience while you speak. These measures include the following:

- Are participants engaged in your presentation?
- Does your presentation have the correct detail-level and focus?
- Is your presentation flowing and transitioning smoothly between topics?
- How well are the presentation objectives you specified being achieved?

Note: The actual presenting and repurposing of the content are not considered development phases, but are discussed for your information.

Section 1: Creating your Content

Phase 1: Identifying your Audience

Objectives

By the end of this section you will know how to:

- Explain the importance of understanding and identifying the characteristics and learning styles of your audience.
- Describe the basic audience characteristics and learning styles.
- Identify the most effective learning formats for each learning style.

Why is it Important to Understand your Target Audience?

All of us are born with a dominant learning style. This style affects how we filter and integrate information into memory, apply what we learn to our daily interactions and on-the-job responsibilities, and communicate with others.

Understanding your target audience's characteristics and learning styles will help you better target your presentation to meet their informational needs. Doing this affects the way the presented information is understood and retained.

Individual learning differences is a broad topic that encompasses a variety of individual factors impacting learning such as:

- Personality (extraversion/introversion).
- Primary language.
- Interest and motivation.
- Information organizational preferences (information presented as facts/figures vs. concepts).
- Sensory modalities in perceiving information (visual representation vs. written or spoken information).
- How individuals process information (sequential vs. "big picture" thinkers).
- Occupations/Professions
- Familiarity with your topic.

For purposes of this workbook, the scope of our discussion is limited to the characteristics and learning styles that most impact how presentations are received and integrated.

What are Audience Characteristics?

Audience characteristics are individual attributes that shape how individuals perceive and interact with their world. Audience characteristics work in conjunction with individual learning styles to impact how information is processed and include the following:

- Primary language.
- Occupation/profession.
- Interest/motivation to participate in your presentation
- Knowledge of your presentation topic.

Primary Language

Our primary language influences the way we view our world in terms of understanding communication and meaning. In our global economy, it is likely that you will have participants in your audience for whom English is not a primary language.

Consider:

- Being very conscious about the use of grammar, jargon and humor in your presentation.
- Supporting your presentation with written materials, such as presentation handouts and PowerPoint slides used in conjunction with your presentation that identify the key points to which you are speaking.

Occupation/Profession

When creating your presentation, it is important to consider whether you are presenting to a group of your peers or will you have a mix of different professions in the audience. Your presentation should be targeted to the informational needs of your audience.

Consider:

- What are your audience's practical perspectives and experience with your topic? Is their need for information different from that of your own?
- What is the appropriate level of detail for your potential audience? Do they need an overview of your topic, a detailed discussion or an emphasis on the practical day-to-day application of your topic?

Interest/Motivation

Audience interest and motivation levels impact how well your presentation will be received. This characteristic is directly impacted by the audience perception of "what is in it for them?" What type of interest and motivation level can you assume that your audience has to participate in your presentation?

For example, are they there only because they have a Continuing Professional Development (CPD) requirement to fulfill, they have an hour to kill, they are only mildly interested or do they work with your topic and are motivated to add to their knowledge?

Consider:

While this characteristic is mainly under individual control, there are presentation techniques that you can use to enhance this characteristic:

- Avoid a long introduction. Start your presentation with a practical story about the topic or a question to the audience that will capture attention.
- Tell the audience how your topic impacts them.
- Get people involved in your topic from the beginning by asking them to write down questions that you will respond to or to share their expectations of the session.
- After completing a section, ask for participants to summarize the most relevant points they understood from that section.
- Include all participants by asking questions from quiet members.

Note: These are an excerpt of the presentation tips discussed in the Presentation Tips section.

Knowledge of your Topic

The final audience characteristic to consider is determining the knowledge that your audience should have about your topic to benefit from your presentation and the familiarity they may already have with your subject matter.

Identifying this information will help you tailor the detail level of your presentation to your participant's knowledge level of your topic.

Ask yourself the following questions:

What is the prerequisite knowledge that your audience should have about your topic to benefit from your presentation? Can you assume that they have it?

How much familiarity can you assume that your audience has with your topic? Are they new to the topic or do they work with it daily and your topic is an area they want to learn more about?

Consider:

Accommodating participants new to your topic by adding some basic concepts as an introduction to your session. This will provide all participants with the same informational base.

Accommodating participants experienced with your topic by providing practical examples and scenarios of how your topic can be applied on-the-job.

What are Individual Learning Styles?

Learning styles are the preferred individual ways to learn and have many dimensions. This section focuses on the research of Fleming and Mills (1992)[1] that suggested the following four categories of sensory modalities (VARK) that are used in learning and effective communication.

VARK (visual, auditory, read-write, and kinesthetic) is not a learning style in itself but is considered part of a learning style because it focuses on one learning preference - our preference for taking in, and putting out information in a learning context.

- Visual
- Auditory
- Read-Write
- Kinesthetic

All individuals range from having a primary sensory modality to a multi-modal style that impacts the way that communicated information is received, processed and communicated.

Following is a basic overview of each of these sensory modalities.

Visual Learners

Visual learners learn best when ideas and concepts are associated with graphs, charts, tables, symbolic arrows, circles and hierarchies that convey and highlight spoken information. They have a tendency to not recall information that is only heard. This type of learner does NOT benefit from movies, videos or PowerPoint. Consider incorporating tables, hierarchies and graphics into your presentation that tie spoken ideas and content to visuals.

Auditory Learners

Auditory learners learn best through listening to information presented orally such as lectures, tutorials, tapes, group discussion, email, speaking, web chat and talking things through. While meeting sessions are an ideal professional development medium for this type of learning style, consider adding benefit by structuring your session to allow for audience questions, answers and discussion throughout the presentation. This will solidify the concepts and add understanding for this type of learning style.

[1]Fleming, N.D. and Mills, C. (1992), Not Another Inventory, Rather a Catalyst for Reflection, *To Improve the Academy*, Vol. 11, 1992., page 137.

Read-Write Learners

Read-Write learners learn best through information displayed as words, specifically, text-based input and output – reading and writing in all of its forms. These learners learn best if you incorporate PowerPoint, the Internet, key words, lists, and quotations into your presentation. Consider starting your presentation with a quote relevant to your topic on your PowerPoint slide as an attention getter and providing these participants with hand-outs of your presentation as well as a page listing additional resources about your topic.

Kinesthetic Learners

Kinesthetic learners learn best by doing or experiencing (e.g., chemistry experiments that take written/presented information out of the abstract). This type of learner benefits from a presentation that allows short breaks and combines presented lecture with audience interaction or activity that supports the key ideas presented. Consider adding demonstrations, simulations, videos and movies of "real" things, as well as case studies, practice and information on practical applications to your presentation.

Design Recommendations

When designing an informational product for a broad audience, it is recommended that you are careful to not tilt your presentation in favor of one style (particularly yours) but include elements from all styles into your presentation.

For example, combine your speaking with the following elements:

- Presentation support tools that utilize color, graphics, charts, table and to appeal to the visual learners.
- Group discussion activities supporting your presentation content to appeal to auditory learners.
- Creating Power Points that incorporate key words and lists along with printed hand-out to your presentation to appeal to read-write learners.
- Incorporating audience interaction in a practical application of your topic to appeal to the kinesthetic learners. These activities can range from breaking your participants up into a group that is tasked with solving a case study to implementation of a new model.

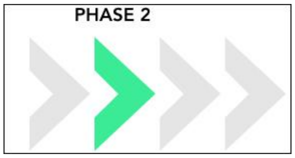
Identifying your Audience's Characteristics and Learning Styles Worksheet

The worksheet below was created as a tool to help you understand the target audience you may have at your presentation.

Worksheet 1: Identifying Audience Characteristics and Learning Styles	
Directions: Please answer the questions to the best of your knowledge and check all answers that apply.	
1. What is the specific purpose of your presentation?	
2. Which professions may be attending your presentation? Check all that apply.	Actuaries ____ Accountants ___ Banking ____ Insurance ____ Asset Management____ Other____
3. What professional experience levels can you assume in your attendees? Check all that apply.	Newly hired ___ 2-5 years ____ 6-10 years ___ 10+ years in profession ____
4. What familiarity level can you assume that you audience already has with your topic? Check all that apply.	None ___ Basic Familiarity ___ Working knowledge ___ Experienced, but looking for new information ____
5. What prerequisite knowledge does your audience need to have about your topic to effectively understand and integrate your presentation?	

Worksheet 1: Identifying Audience Characteristics and Learning Styles	
6. Can you assume that your audience has this prerequisite knowledge, or should you cover it in your presentation?	Audience has prerequisites ___ Prerequisites will be included in presentation ___
7. What is your audience's interest level in your topic? Check the most applicable option.	Curious ___ Subject matter only touches on responsibilities ___ Work with subject matter daily __
8. What is your audience's motivation level to attend your presentation? Check all that apply.	Getting their CPD requirement out of the way ____ Adding to knowledge in subject matter ____ Practical application of subject matter ___ No other session available at this particular time ___
9. How will you tailor the detail level of your presentation to the audience characteristics you just identified?	Start presentation with statement about "what is in it for them?" ___ Incorporate a basic overview into presentation ___ Ask participants to share their expectations of your presentation ___ Incorporate practical case studies or other practical application information ___ Add details relevant to related professions into your presentation ___ Other___
10. Which of the learning styles sound like your audience?	Visual ___ Auditory___ Kinesthetic___ Mixed Modalities ___

Worksheet 1: Identifying Audience Characteristics and Learning Styles	
11. Which presentation strategies will you incorporate for identified learning styles?	Communicate a “road map” for your presentation in the form of goals and objectives___ Incorporate color and graphics into PowerPoint ___ Incorporate time for questions throughout presentation ___ Incorporate audience interaction into presentation ___ Incorporate a pre-work reading assignment into your presentation which is discussed/debated___ Provide learners with puzzles or cases to solve ___ Incorporate cooperative group activities into your presentation ___ Incorporate individualized projects into your presentation ___



Phase 2: Designing your Content

Objectives

By the end of this section you will know how to:

- Explain the purpose of the design phase.
- Identify your presentation goal and objectives.
- Outline your content.
- Identify the types of visual design that will best highlight your main points.
- Verify alignment with the SOA Competency Framework.
- Identify the best presentation strategy to get your audience from their current knowledge level to where you want them to be.

The Design Phase

The purpose of the design phase is to create a "blue print" for your session content. In the previous analysis step, you identified the characteristics and learning styles of your audience and what they already know about your content. In this step you will apply that information in creating your presentation outline. This consists of the following tasks:

- Identify the goal of your presentation and write supporting objectives.
- Organize your content to meet the written objectives.
- Check your content for alignment with the competency framework.
- Select the examples, graphics and activities that will best support each section of your content.
- Select the strategy to use that will best present your ideas to your target audience.
- Select the method you will use to evaluate whether your presentation achieved its goal and objectives.

Defining your Presentation Goal and Objectives

The first steps of the design phase are to define your presentation goal and write your objectives. A goal is generally a broad statement about what you want to accomplish with your presentation. Your goal is then broken down into objectives that specify the precise steps you need to take to reach your goal.

Goals are usually too general to be measurable, but objectives are always started with an action verb and specify what participants will be able to do after attending your presentation.

Note: Verbs such as understand, appreciate, and know are not measurable and should not be used when writing objectives.

Writing your Goals Worksheet

Goals are general statements of your intended results. The worksheet below was created as a tool to help you write your goals.

Worksheet 2: Writing your Goal				
Directions: Write your goal in the area below. Use the questions to determine if you've written a good goal.				
Example: **Goal:** Identify existing perspectives on the role that ERM played in the financial crisis and suggested steps for moving forward.				
Goal:				
Goal Review:		**Yes**	**No**	
Is your goal a broad statement of the result you want to achieve?				
Does your goal describe the "bottom line" information you want your audience to take away with from your presentation?				
Is your goal specific and clearly stated?				
Is your goal attainable and realistic within the presentation time frame?				
Is your goal relevant to your target audience?				
Revise your goal if you answered NO to any of the questions.				

Writing your Objectives Worksheet

Where your goal is a broad statement of your general purpose with the presentation, objectives identify the specific steps that need to be taken to achieve your stated goal. The worksheet below was created as a tool to help you practice writing good objectives.

Worksheet 3: Writing your Objectives

Directions: Write your objectives in the area below. Use the questions below to determine if you've written a good objective.

Example:

- **Objective 1:** List the factors that contributed to the current economic crisis.
- **Objective 2:** Compare and contrast the effective and ineffective firm-wide risk identification, measurement and analysis practices that contributed to positive and negative financial consequences.
- **Objective 3:** Identify the presented perspectives on how the regulatory community can achieve a principles-based approach.

Objectives: After attending this presentation, participants will be able to:

-
-
-

Do your objectives meet the following criteria?	**Yes**	**No**	
Are your objectives easy to understand?			
Do they start with action verbs (Identify, list, state, describe, explain, show, etc)?			
Do they state only one result to be accomplished? (Note: "Identify and list the following information..." is not one result).			
Do they state a result that can be measured and verified? (Note: 'Understand' or 'know' cannot be measured. You need to start with the action that will be used to demonstrate that participants understand and know.)			
Are your objectives realistic? (**Note**: Is the result attainable for participants?)			

Worksheet 3: Writing your Objectives			
Are your objectives thorough or are you missing any intermediate objectives? (**Note**: Objectives generally start by identifying the most basic information you will need to understand or perform and then build on that in sequential steps.)			
Revise your objectives if you answered NO to any of the questions.			

Outlining your Content

Now that you have written your goal and specified your objectives, your next step is to create an outline of your presentation based on the specified goal and objectives. The purpose for creating an outline is to help you:

- Lay out your content topics in a logical flow.
- Stay on track when starting to create your presentation.
- Determine the types of details you need to add to the topics.
- Verify a logical flow and smooth transition between topics.
- Identify the best order in which your subtopics should appear.
- Select the graphics and presentation media that would best support your information.

There are a variety of ways in which you can lay out your presentation outline that include everything from writing your main points and supporting details on note cards and laying them out to different types of design documents that provide a template for your information.

As you create each section of your outline, you should also incorporate the following information:

- What types of examples or graphics would best support the information presented in each section?
- What are the supporting activities or audience interactions (if appropriate) that would be support understanding of the content brought up in the section.

Use of Graphics and Examples

Have you ever heard the saying "A picture is worth a thousand words?" The use of graphics and examples can either enhance or break your presentation.

A good rule of thumb is to use examples and graphics in your presentation to add practical and visual evidence of the information that you are presenting.

- Examples should be meaningful and demonstrate a practical application of the content that you are presenting.
- Graphics should be used to capture your audience's attention and reinforce the key concepts or points that you are presenting. Graphics should always provide meaningful visual evidence of your information. Avoid all other types!!

PowerPoint was created as a tool to provide participants with a visual focal point during your presentation. PowerPoint is best suited to project the key points to which you are speaking as well as creating tables and charts. Keep your slides clean with concise information. Do NOT overload the slides with too much detail.

Use of Activities and Interactions

Presentations have not changed since the time of Aristotle who stood and lectured to a group of learners sitting in a circle at his feet. For today's audience, lectures are effective only as long as they capture interest, curiosity; motivate critical thinking, and the desire to learn.

You learned in the Audience Analysis section, that adding audience activities and interactions can increase interest, motivation and the retention rate of presented information.

As you are outlining your presentation topics and details, consider whether the information in that section will be better learned by including some sort of audience interaction.

Interactions can include the following possible formats:

- Asking the audience questions to determine their knowledge about your topic or how they apply the information on the job. Practical application usually sparks discussions and a sharing of information.
- Presenting a problem and then soliciting audience feedback on ideas of how to solve it. This is best followed by presenting a "best-practice" solution to the problem.
- Breaking the audience into small groups and presenting them with a topic or a problem on which they should come to a consensus and report back.
- Presenting the audience with a case study or problem to solve.
- Adding activities that recreate situations participants may encounter on the job with suggested solutions.

The decision about audience interaction depends on the type of content you are presenting. Ask yourself if learning a practical application of the information would benefit your audience and then write the interaction suggestions/ideas down in your design template.

Creating a Presentation Outline Worksheet

This worksheet uses a table format to lay out your presentation. The benefit of this format is that you can lay out the objectives, key points, supporting graphics/example and supporting activities in an easy to read format. Feel free to add additional rows to the table and print it as a worksheet.

Worksheet 4: Creating a Presentation Outline				
Directions: Fill in the areas below to create your outline. Sample information for the Introduction section is included for your benefit.				
Section	**Objectives** After competing this section, participants will be able to:	**Key Points**	**Supporting Graphics/Examples**	**Supporting Activities/Interactions**
Introduction	Describe presentation content and logistics	Introductions Presentation goal and objectives Presentation format and timing	Opening with practical story about subject. PowerPoint with key points used to present information.	Participants listen
Section 1				
Section 2				

Aligning Content with the SOA Competency Framework

The SOA Competency Framework is the output of the *2008 SOA Competency Framework for Continuing Professional Development* project. The project defined the competencies (synthesis of knowledge, skills and behaviors) required for the effective performance of the actuarial job.

The competency framework provides a blueprint that can guide systematic and sound approaches to designing, developing and delivering effective professional development learning solutions and options.

The SOA Competency Framework consists of the following eight competencies:

- Communication
- Professional Values
- External Forces and Industry Knowledge
- Leadership
- Relationship Management and Interpersonal Collaboration
- Technical Skills and Analytical Problem Solving
- Strategic Design and Integration
- Results-Oriented Solutions

All potential session topics will fall into one or more of the competency areas. You can develop either standalone sessions that fall cleanly into each competency or look at associated competencies to add either as examples or related details to your topic selection.

You can use the competency framework in the following ways:

- Identify relevant session topics (see the *Aligning Meeting Sessions with the Competency Framework Checklist*).
- Identify competencies you can combine with your topic to add details or examples to your selected content.

Combining Competencies in your Design

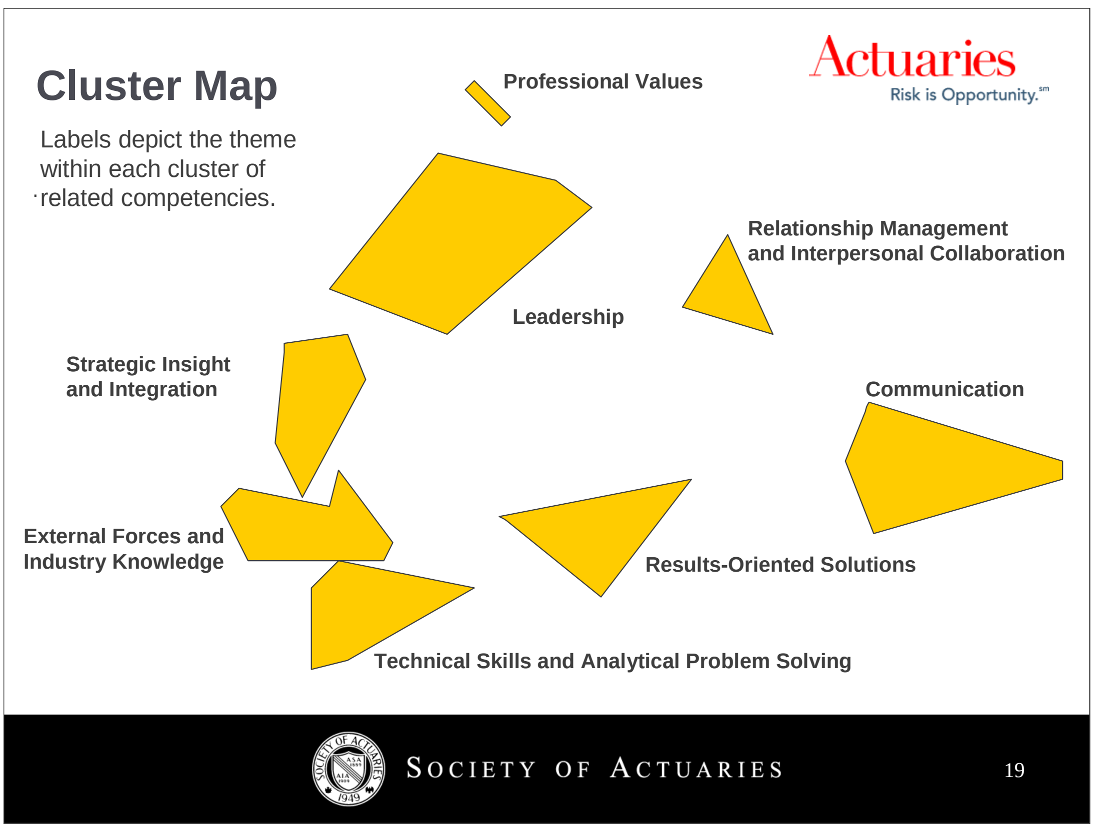
The following graphic displays the labeled cluster map created as one of the outputs of the multivariate analysis that was performed to analyze and structure the project data. Looking at the map, remember that in a cluster analysis, groupings in close proximity to each other indicate competencies that are similar or related to each other.

A practical use of this information is to:

Review the map to identify the competency cluster to which your selected topic belongs.

Review the map to see which clusters are in close proximity to your topic cluster.

Look up the examples of the competency clusters statements in Appendix B for relevance to your topic and possible inclusion as either additional details or examples.



Examples:

You can see that the *External Forces and Industry Knowledge and the Technical Skills and Analytical Problem Solving* clusters are close to each other.

Consider:

You can combine the following competencies: "Demonstrate general business knowledge and skills" (*External Forces and Industry Knowledge* cluster) and "Review government regulations and distill the knowledge into clear and useful advice for your client" (*Technical Leadership* cluster) into a session on anticipating new applications for actuarial principles.

You can also determine if competencies located further from each other (different skill sets) can possibly be combined to create effective presentations.

Consider:

You can combine the following competencies: "Demonstrate a complete and thorough understanding of the subject matter that constitutes an area of practice" (*Professional Values* cluster) with "Translate complex actuarial issues and findings into business action" (*Results-Oriented Solutions* cluster) to create a presentation on the expanded roles that actuaries can have in a business.

Using the SOA Competency Framework Worksheet

The following Excel worksheet was developed as a tool to help you identify possible competency combinations that will help you provide a richer presentation.

Directions: Double-click the Excel icon link to open *Worksheet 5: Designing Meeting Sessions Aligned with the Competency Framework*. Print the worksheet as needed.

Microsoft Office
Excel Worksheet

After completing this worksheet, go back and refine/update the content details in the design document created in the previous section before proceeding to the development phase.

Deciding on a Presentation Strategy

The final step you have left in the design phase is to decide on the best presentation strategy for your presentation content. The typically used presentation strategies at the Society of Actuaries include the following:

Buzz Group (BG) – this type of format consists of a large group of participants divided into small units, usually of no more than six participants each meeting simultaneously. The purpose of the group is to react to a topic or a charge given to the participants.

Interactive Forum (IF) – this type of format is an actively moderated session that includes significant participants.

Interview (I) – this type of format is a formal interaction involving specified questions which elicit informational responses on a given topic.

Lecture (L) – this type of format is a formal presentation usually given by one expert.

Open Forum (OF) – this type of format is a broad discussion of a topic with high levels of audience participants.

Panel Discussion (PD) – this type of format consists of experts presenting specific topics with limited audience participation.

Teaching Session (TS) – this type of format consists of a detailed, how-to approach on stated subject matter conducted with a small group of participants.

Workshop (WS) – this type of format is an informal discussion of a topic structured for a small group of participants.

Given your audience information and the design you just laid out, what is the best format for you to use for your presentation? Check the one you plan to use.

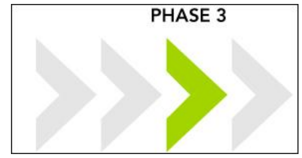
SESSION FORMATS			
Buzz Group ___	Interactive Forum ___	Interview ___	Lecture ___
Open Forum ___	Panel Discussion ___	Teaching Session ___	Workshop ___

Dealing with Development Constraints

Before starting your session development, consider if any of the following constraints may impact your work:

- Do you have enough time to develop the session topic?
- Will the development of the session topic require additional expertise or research?
- Will you require any additional resources (e.g., additional presenters, equipment, and budget)?
- Are you planning to use any copyrighted materials in your presentation? If so, can the right to use them be secured in easily and in time? If the right can be secured, can you modify the materials? Can any modifications be completed in time?
- What is the presentation room setup that you should prepare for? Will you be able to get the ideal setup that you need?
- Will the presentation room accommodate the expected number of participants and break-out or audience interaction activities? What is your contingency if it doesn't?

You should consider and answer all of these questions before starting development on your presentation.



Phase 3: Developing your Content

Objectives

By the end of this section you will know how to:

- Create your presentation materials.
- Verify the soundness of your materials.
- Determine how you will evaluate the success of your presentation.
- Perform a test run of your presentation.

Develop your Content

The Development phase is where you create your materials from the specification you outlined in the analysis and design phases. At this point, you should have a good idea of your target audience, the topics you want to present and how you plan to focus your presentation to meet your target audience's informational needs.

Developing your Presentation

To start your development, consider if you are creating a brand new presentation or are there existing materials that you can reuse? In this phase, you will be adding details to your design document to develop the following:

- Your presentation PowerPoint slides.
- Presentation hand-out materials (e.g., audience interaction scenarios, directions and copies of your presentation).

Developing your PowerPoint

PowerPoint is a tool that has become a universal tool of choice for all types of presentations. PowerPoint works best for items that need to be presented visually, not verbally. Keeping this in mind, the most effective use of PowerPoint is to list the key points to which you will be speaking and add tables, charts and graphics where needed. Keep the following tips in mind when developing your slides:

- Do not overload your slides with information. Keep them clean and limited to your main points and supporting evidence. Add details to the PowerPoint Notes section for yourself and if needed, print just the Note pages for you to speak from.
- Watch the use of color combinations. These are guaranteed to distract your audience from your main message.
- In this same vein, watch the use special effects and sound. An over use of these will not only distract but will also annoy your audience. Use them sparingly, if at all.
- Be careful that you only use graphics that provide visual support for the content that you are presenting. If the graphic is not meaningful, it is a focal point that distracts the audience from your presentation and can convey unintentional meanings. PowerPoint is full of these types of graphics!!

- Do not be shy about using the spell check provided with PowerPoint. If you see any red underlined words after you finish your presentation, run the spell check! A clean, well organized presentation adds to your credibility.

Developing your Hand-Out Materials

Presentation hand-out materials can include the following:

- A copy of your presentation PowerPoint slides.
- Any activity or audience interaction sheets that contain directions, the goal of the activity, and overviews of the activity or interaction.
- Additional information articles or resources that support the presented content (you can always provide a slide at the end of your presentation with links to any relevant files).

Do not forget to run a spell-check on the materials after developing them!

Verifying Presentation Soundness

After completing the first draft of your materials, it is highly recommended that you verify the soundness of your presentation. When verifying soundness, you review items such as:

- Detail accuracy and thoroughness.
- Informational sequence and flow.
- Use of grammar and jargon.
- Appropriate use of interactions and activities.
- Selection of appropriate delivery medium.
- Presentation quality.

Worksheet 6: Verifying Content Soundness on the next page walks you through a checklist of items to check and correct, if needed.

Evaluating Content Soundness Worksheet

Worksheet 6: Evaluating Content Soundness			
Directions: Use the checklist below to review and evaluate the soundness of your presentation.			
Does your presentation meet the following criteria?	**Yes**	**No**	
Are the content details accurate?			
Are the content details complete?			
Are the content details up-to-date?			
Is the content at an appropriate level of details for your identified audience?			
Is the content sequenced properly?			
Does your presentation flow smoothly?			
Is the content vocabulary level appropriate for your audience?			
Is the use of jargon avoided?			
Is the delivery mode appropriate for the content?			
Do your activities or audience interactions support the content?			
Is the general quality of the content consistent with SOA standards?			
Revise your content if you answered NO to any of the questions.			

Development Testing your Presentation

It is always a good idea to development test your presentation by doing a dry run. A dry run can be done by asking a family member or friend to act as audience, or just mentally going through the presentation your self.

Doing a dry-run of your presentation will help you determine the following:

Does your presentation have a good flow?

Is it sequenced correctly or do you need to add new content, or maybe reorder/ delete existing content?

Are the times you determined a good 'guestimate' or are you running over? If you are running over, what content should be modified?

Are the audience interactions, examples and graphics you selected sequenced well within your content flow? Are they taking the time you thought they would?

Do you have all of the resources that you thought you may need or do you need others?

Do any new questions or constraints that you didn't consider before become obvious now?

Have allowed enough time for all questions and discussion?

After completing your 'dry run,' go back and update your presentation accordingly.

Phase 4: Evaluating your Presentation

Objectives

By the end of this section you will know how to evaluate behavioral criteria to evaluate:

- Participant engagement.
- Whether your presentation detail is on focus.
- If your presentation is flowing smoothly.
- Are your presentation objectives being met?

Evaluating your Presentation

The success of presentations is determined by both, external and internal factors. The external factors include things like appropriate expectations being set by session descriptions and the venue in which the presentation occurs. Internal factors are under your control and include considerations such as whether the presentation was on target for the audience and well delivered.

The SOA uses different types of external presentation evaluation forms, both electronic and paper-pencil. However, you may want to consider keeping in mind the following practical behavioral measures of your presentation success which can be implemented just by being observant and aware of your audience while presenting:

- Are participants engaged in your presentation?
- Does your presentation have the correct detail-level and focus?
- Is your presentation flowing and transitioning smoothly between topics?
- How well are the presentation objectives you specified being achieved?

Determining Participant Engagement

Keep an eye on the following as a measure of participant engagement in your presentation:

- What is the amount of traffic in and out of your presentation?
- If you see participants leaving your presentation, at which points are they leaving?
- How much shifting are participants doing in their seats while you speak?
- Do you have laughter at appropriate times?
- Are participants asking questions or passively listening?

Determining Correct Presentation Focus

Keep an eye on the following to determine if your presentation has the correct focus and level of detail:

- Do you see blank or confused faces after making a key point, presenting an example or asking a question? You will need to gauge from this if the majority of your audience is tracking with you or needs more details.
- Are participant questions on track for the level of detail you are providing or are they asking more basic questions? You will want to keep the types of questions in mind and consider updating your information accordingly.
- Do you see participants shifting around in their chairs and leaving your presentation or are they staying put for the entire presentation?
- If participants do leave your presentation, at what points are they leaving? The content you are presenting when you have a lot of activity may be good content to revisit in terms of detail and focus. It may also be a good idea to look up the demographics of attendees at your presentation to better understand you possible target audience.

Determining if your Objectives are being Achieved

Keep an eye on the following to determine if objectives you specified for your presentation are being achieved:

- Are participant questions on track for your content focus?
- Do you have questions where participants are applying the content you presented to their own situations?
- Are participants fully engaged and participating in you planned interactions or activities?
- Do you have a good number of participants wanting to ask questions after the presentation? Specifically requesting more information or more details?

Verifying Presentation Flow

Keep an eye on the following to determine if your presentation has a good presentation flow:

- Do you see confused or blank faces at any of your transitions between topics?
- Do participants stop you, back you up and ask questions about content you assumed was obvious?
- Do participants make a point to speak with you after your presentation and ask you to explain content you assumed they understood?

Section 2: Repurposing Content and Presentation Tips

Repurposing your Content

Objectives

By the end of this section you will know how to:

- Identify the types of content that you are presenting.
- Determine the other types of presentation mediums to which the content may lend itself.

Identifying Presentation Content Types

Repurposing our content to better suit member needs is a new initiative at the SOA. When you repurpose content, you basically identify other delivery mediums through which that content can be delivered.

To select the best repurposing delivery medium for any presentation, you need to identify the type of content that is being presented. Content falls into two category types:

- Conceptual information such as new rules and regulations. Conceptual information answers the questions of who, what, where, why and why?
- Procedural information such as using a new modeling tool? Procedural information answers the question of how? Procedural information usually also includes some level of conceptual information such as an explanation of system components or why a process is structured the way it is).

Repurposing your Content

Repurposing Conceptual Information

Conceptual information best lends itself to presentation via meetings, webcasts and articles. Also, consider if the sound portion of a meeting or webinar presentation would lend itself to an audio download which members can listen to while driving in their cars or commuting on the train.

Repurposing Procedural/Combined Information

Procedural information is best learned by applying it in hands-on sessions that present both concepts and procedures through delivery via workshops, interactive meeting sessions, e-Learning modules or courses with “hands-on” components incorporated into the design. Depending on its original format, procedural information can be repurposed into webcasts, “How To” articles, and downloadable videos.

Presentation Tips

Objectives

By the end of this section you will know how to:

Identify presentation tips that relate to the following:

- Presentation timing.
- Addressing audience informational needs.
- Effective opening strategies.
- Efficient use of PowerPoint
- Effective closing strategies.

Presentation Tips

To conclude this workbook tool, we are adding a section of presentation tips. While presentation is not a development step, the following presentation tips are included for your information and consideration:

Prepare your presentation to take up about 75% of your allotted time. This leaves room for questions and any unexpected glitches (e.g., computer/equipment problems, etc.).

Keep the following focus about your audience in mind when presenting:

- Why should the audience care about your presentation? What is in it for them?
- What does the audience expect from the presentation?
- What would motivate this particular audience to listen and pay attention?
- What questions, objections, or disagreements can you possibly expect to your content?
- What specific information do you want your audience to walk away from your presentation with? What do they need to know to benefit from the presentation?

Provide your audience with a framework or a "roadmap" at the start of your presentation so they know what to expect.

- Display either presentation objectives or a list of the topics that will be covered.
- Tell them your purpose, what you hope to achieve with your presentation and identify benefits to users from attending (what's in it for them?).

Provide continuity in discussing your topics by using smooth transition statements like "First I want to talk about…." then "Next……."

Open your presentation with an attention grabber which can include the following:

- A question related to the topic to start the presentation (e.g., for a strategy topic: "when you look at life, what is your focus?" Do you see the forest, the trees or the bark on the trees?
- A quote presented on your first PowerPoint slide (e.g., If you don't know where you are going, you will wind up somewhere else -Yogi Bera*)* which you will follow with your introduction.
- A story (real-life, if possible) about the topic.

Avoid putting too much data on your Power Point slides.

- Put key points on the slides and then speak to them.
- Aim for no more than 1 slide per two minutes of presentation.

If you need to display a lot of information on the slide, consider using animation to uncover one portion of the slide information at a time. But, use animation sparingly!!

- Make sure that animation works smoothly and adds value. Don't use animation just for animation's sake. Use animation minimally so it does not distract. You want the audience focused on your content, not on graphics flying into view!
- Another thing to be aware of is that using sound in PowerPoint presentations tends to irritate listeners. Be careful with this!

Make sure you define any acronyms you use (e.g., Society of Actuaries (SOA)) in the body of your presentation before using the acronym by itself.

Make each presented point simple, illustrate it with an example (if possible) and then explain its benefit to the audience.

To keep your audience involved in your presentation, consider occasionally asking your listeners something like "And what do you thing happened next?" or "What do you think was the outcome?" It doesn't matter if they answer right or wrong, it matters that they are now more involved in your presentation.

If your presentation includes audience participation activities, gear the activities to your audience (e.g., an activity would make the topic relevant to your audience) and to the topic (e.g., activity should get a specific topic point across or you should be able to explain its relevance to topic). Activities should support points made in the presentation. For example:

- Sprinkle audience questions throughout your presentation.
- Involve the audience in interactive discussion/feedback on specific points by trying a "shared pairs" activity where you ask listeners to turn to the person next to them and share an experience or opinion relevant to your presentation. Then ask the pairs to present to the room for a discussion.
- Give them a case study to solve in teams or groups.
- Consider if your audience will be open to a game or a competition-type of activity. Does your content lend itself to this?

Keep the following tips in mind to encourage and facilitate discussion:

- Be open to audience questions throughout your presentation. However, keep discussions and questions on track with the following techniques:
  - If a participant goes off on a tangent, stress the separation of major points from minor ones. Concentrate only on those parts of comments which relate to the agenda you have established. Let listeners know why you are responding selectively to their remarks, and assure them that you are available to discuss their concerns after the presentation.
  - Encourage participants to hold discussions with each other, instead of expecting the ultimate response or final word to come from you. A thoughtful debate is more enriching than collective agreement.
- Instead of your frequently summarizing the discussion along the way, consider asking one or two participants what they think were the most important points made at each stage of the discussion.
- Consider jotting down notes while a participant is speaking, and refer back to these comments during the discussion or at a later point in the presentation. Your participants will feel that you are listening to what they are saying and will respond better to you and the presentation.
- Just before asking for final questions at the end of the presentation, ask one or two participants to summarize the main points presented for you. Also, talk about your next meeting or presentation, including issues that may be discussed.

Use smooth transitions throughout your presentation with phrases like “now that we understand the first point, let’s move on to the next point.”

End your presentation strongly with a recommendation, challenge, or a closing comment that builds “suspense/anticipation” (e.g., “in summary, here is the bottom line……) telling them what you want them to do or take away from your presentation.

Section 3: Resources

Appendix A - Worksheets

This appendix provides copies of all of the worksheets presented in the body of this workbook for your convenience to print as needed.

Worksheet 1: Identifying Audience Characteristics and Learning Styles	
Directions: Please answer the questions to the best of your knowledge and check all answers that apply.	
1. What is the specific purpose of your presentation?	
2. Which professions may be attending your presentation? Check all that apply.	Actuaries ____ Accountants ___ Banking ____ Insurance ____ Asset Management____ Other____
3. What professional experience levels can you assume in your attendees? Check all that apply.	Newly hired ___ 2-5 years ____ 6-10 years ___ 10+ years in profession ____
4. What familiarity level can you assume that you audience already has with your topic? Check all that apply.	None ___ Basic Familiarity ___ Working knowledge ___ Experienced, but looking for new information ____
5. What prerequisite knowledge does your audience need to have about your topic to effectively understand and integrate your presentation?	

Worksheet 1: Identifying Audience Characteristics and Learning Styles	
6. Can you assume that your audience has this prerequisite knowledge, or should you cover it in your presentation?	Audience has prerequisites ___ Prerequisites will be included in presentation ___
7. What is your audience's interest level in your topic? Check the most applicable option.	Curious ___ Subject matter only touches on responsibilities ___ Work with subject matter daily __
8. What is your audience's motivation level to attend your presentation? Check all that apply.	Getting their CPD requirement out of the way ____ Adding to knowledge in subject matter ____ Practical application of subject matter ___ No other session available at this particular time ___
9. How will you tailor the detail level of your presentation to the audience characteristics you just identified?	Start presentation with statement about “what is in it for them?” ___ Incorporate a basic overview into presentation ___ Ask participants to share their expectations of your presentation ___ Incorporate practical case studies or other practical application information ___ Add details relevant to related professions into your presentation ___

Worksheet 1: Identifying Audience Characteristics and Learning Styles	
10. Which of the learning modalities sound like your audience?	Visual ___ Auditory___ Read-Write ___ Kinesthetic___ Mixed modality ___
11. Which presentation strategies will you incorporate for identified learning styles?	Communicate a “road map” for your presentation in the form of goals and objectives___ Incorporate color and graphics into PowerPoint ___ Incorporate time for questions throughout presentation ___ Incorporate audience interaction into presentation ___ Incorporate a pre-work reading assignment into your presentation which is discussed/debated___ Provide learners with puzzles or cases to solve ___ Incorporate cooperative group activities into your presentation ___ Incorporate individualized projects into your presentation ___

Worksheet 2: Writing your Goal				
Directions: Write your goal in the area below. Use the questions to determine if you've written a good goal.				
Goal:				
Goal Review:		**Yes**	**No**	
Is your goal a broad statement of the result you want to achieve?				
Does your goal describe the "bottom line" information you want your audience to take away with from your presentation?				
Is your goal specific and clearly stated?				
Is your goal attainable and realistic within the presentation time frame?				
Is your goal relevant to your target audience?				
Make revisions to your goal if you answered NO to any of the questions.				

Worksheet 3: Writing your Objectives			
Directions: Write your objectives in the area below. Use the questions below to determine if you've written a good objective.			
Objectives: After attending this presentation, participants will be able to: • • •			
Do your objectives meet the following criteria?	**Yes**	**No**	
Are your objectives easy to understand?			
Do they start with action verbs (Identify, list, state, describe, explain, show, etc)?			
Do they state only one result to be accomplished? (Note: "Identify and list the following information..." is not one result).			
Do they state a result that can be measured and verified? (Note: 'Understand' or 'know' cannot be measured. You need to start with the action that will be used to demonstrate that participants understand and know.)			
Are your objectives realistic? (Note: Is the result attainable for participants?)			
Are your objectives thorough or are you missing any intermediate objectives? (Note: Objectives generally start by identifying the most basic information you will need to understand or perform and then build on that in sequential steps.)			
Make revisions to your objectives if you answered NO to any of the questions.			

Worksheet 4: Creating a Presentation Outline				
Directions: Fill in the areas below to create your outline. Sample information for the Introduction section is included for your benefit.				
Section	Objectives After competing this section, participants will be able to:	Key Points	Supporting Graphics/Examples	Supporting Activities/Interactions
Introduction	Describe presentation content and logistics	Introductions Presentation goal and objectives Presentation format and timing	Opening with practical story about subject. PowerPoint with key points used to present information.	Participants listen

Worksheet 6: Evaluating Content Soundness			
Directions: Use the checklist below to review and evaluate the soundness of your presentation.			
Does your presentation meet the following criteria?	**Yes**	**No**	
Are the content details accurate?			
Are the content details complete?			
Are the content details up-to-date?			
Is the content at an appropriate level of details for your identified audience?			
Is the content sequenced properly?			
Does your presentation flow smoothly?			
Is the content vocabulary level appropriate for your audience?			
Is the use of jargon avoided?			
Is the delivery mode appropriate for the content?			
Do your activities or audience interactions support the content?			
Is the general quality of the content consistent with SOA standards?			
Make revisions to your content if you answered NO to any of the questions.			

Appendix B – SOA Competency Framework Example Statements

Each of the competency clusters consists of associated statement examples grouped into the clusters by common theme. The statements within each cluster were also ranked by relative importance and are listed in descending order with the most important (in relation to others in the cluster) appearing first. **Note:** The statements are not a comprehensive listing and should be used as examples.

Communication Competency

This competency is defined as: "Demonstrating the listening, writing and speaking skills required to effectively address diverse technical and non-technical audience in both formal and information settings."

Examples of this competency include the following:

Demonstrate effective listening skills.

- Be in the moment, do not interrupt and do not start formulating your response while person is talking.
- Ask the right questions to clarify the nature of the problem to be solved; understand needs versus wants.
- Restate the answers you hear to better insure common ground.
- Summarize your understanding of the response to verify that it is accurate and ask for feedback.
- When necessary, synthesize many points of view to arrive at a collaborative conclusion.

Generate clear written communication that is grammatically correct, organized, to-the-point, concise and does not use jargon.

- Analyze your audience, their comfort level with actuarial concepts, and identify the information they need to know.
- Tailor the detail levels of your written communication to the informational needs of your target audience.
- Explain complex actuarial concepts in straightforward ways and in language meaningful to your audience.
- When appropriate, request a peer review and address feedback before emailing or disseminating your work.
- Use the active voice, define your abbreviations and avoid jargon. (If you do need to use jargon, make sure that you put the jargon into context at the start of your written communication).
- Proofread your work for grammatical errors and calculation accuracy before sending.

Generate clear oral communication that is grammatically correct, organized, to-the-point, concise and does not use jargon.

- Analyze your audience, their comfort level with actuarial concepts, and identify the information they need to know.
- Tailor the detail levels of your oral communication to the informational needs of your target audience.
- Organize your content.
- Explain complex actuarial concepts in straightforward ways and in language meaningful to your audience.
- When appropriate, request a peer review and address feedback before your presentation.
- Use the active voice, define your abbreviations and avoid jargon. (If you do need to use jargon, make sure that you put the jargon into context at the start of your oral communication).

Communicate persuasively and concisely in language meaningful to your target audience

- Address problems and solutions.
- Use negotiation and persuasion techniques to achieve buy in.
- Employ accomplished presentation skills to present necessary content to audience.
- Identify when and where to use graphical elements (pictures, charts, diagrams, etc.) to support the effectiveness of your presentation.
- To summarize, restate two to three key themes that you would like the audience to take away from your presentation.

Communicate difficult messages to your target audience.

- Analyze the situation and your audience to identify the purpose and desired outcome of your communication.
- Identify the best medium and delivery mechanism to use (written versus oral, in person versus electronic).
- Organize the message for clarity.
- Present risks and potential impacts of different scenarios so your audience can make an informed decision.
- Do not understate the negative aspects of your message.
- End with a summary of the advantages of recognizing and addressing difficult information.
- When possible, be proactive and suggest solutions and mitigating actions.

Professional Values Competency

This competency is defined as: “Adhering to standards of professional conduct and practice where all business interactions are based on a foundation of integrity, honesty and impartiality.”

Examples of this competency include the following:

Demonstrate a complete and thorough understanding of the subject matter that constitutes an area of practice.

- Keep up to date with practice-specific developments since your qualification.
- Stay current with regulatory issues and developments.

Apply high ethical standards in serving your client and the public.

- Demonstrate a high degree of honesty, integrity, independence and concern for client goals and needs.
- Maintain a professional, reliable, and client-focused approach.
- Identify, quantify and disclose risk and costs even when it is uncomfortable to do so.
- Always advocate for outcomes supported by sound actuarial analysis (even in situations where client preferences may be otherwise).

Demonstrate that the profession exists to represent the public's interest.

- Look for opportunities to improve existing policies and laws affecting the public (e.g., influence policymakers to address to address the actuarial aspects of social issues).
- React proactively to shortcomings in existing public programs (e.g., bring together experts to design a new retirement system from the ground up).

External Forces and Industry Knowledge Competency

This competency is defined as: “Identifying and incorporating the implications of economic, social, regulatory, geo-political and business changes into the design and delivery of actuarial solutions.”

Examples of this competency include the following:

Understand the actuarial considerations of external forces that can influence business performance (competition, social factors, economic factors, legal factors, political factors, technological factors and ethical factors).

- Understand the domestic and international regulatory frameworks and their effect on your industry.
- Anticipate possible gaps and oversights in regulations, legislation and oversight and their impact on your business environment.
- Incorporate considerations of external forces into the design and delivery of your actuarial solutions.

Understand the internal forces that can influence business bottom line (evolving business models, financial performance, existing processes and systems, worker satisfaction).

- Understand the financial drivers of business performance.
- Understand the impact of economics on consumer decision-making.

Demonstrate general business knowledge and skills

- Understand the bottom line effect of business decisions.
- Network with non-actuaries.

Translate actuarial concepts to business acumen.

- Make the link between technical actuarial detail and your client's bottom line.
- Integrate complex actuarial concepts with other related technical disciplines.
- Frame actuarial issues in a business context.

Respond rapidly to changes in the business environment

- Balance theory with practical business realities.
- Work collaboratively and across functions to solve complex financial problems.
- Translate complex actuarial issues and findings into business action.

Leadership Competency

This competency is defined as: "Initiating, innovating, inspiring, creating or otherwise acting to influence other regardless of level or role towards a common goal."

Examples of this competency include the following:

Collaborate across disciplines to achieve the optimal results.

- Work effectively with other professional groups.

Expand the scope in which actuaries can play an important role.

- Demonstrate thought leadership, making things happen that are outside the bounds of the "way we've always done it."
- Be flexible and open to change.

- Be proactive and visible so that the market will become more aware of the contributions an actuary can make to the normal business process.

Take new information (such as changes in standards or legislation) and proactively apply that information to client situations.

Be recognized as a thought leader, role model, and strategic business partner both within and outside your industry.

- Work effectively with among other professional groups that work in related areas such as accountants, economists, demographers, statisticians, and technology specialists.

Influence progressive change.

- Build relationships within an organization that enhance the ability to influence strategies, tactics and day-to-day execution.
- Work and learn in teams with non-actuaries in productive collaborations.
- Network and develop relationships that contribute to a greater understanding of the link between financial risks and overall corporate strategic decision-making.

Mentor and help develop junior actuaries with competencies of business leaders as well as subject matter experts.

Stay in touch with actuarial organizations, contribute to their initiatives and maintain awareness of issues facing the profession.

Relationship Management and Interpersonal Collaboration Competency

This competency is defined as: "Creating mutually beneficial relationships and work processes towards a common goal."

Examples of this competency include the following:

Build relationships of trust with others by honoring commitments and seeking to understand issues from their perspectives.

- Understand how your client looks at issues.
- Listen and understand your client's needs before designing a solution.
- Acknowledge and respect opposing opinions and analyses.
- Present difficult messages clearly.
- Counter pressure to withhold difficult messages.
- Follow peer review and professional guidelines.
- Document and retain work products to comply with new and existing requirements.

Function effectively as a team leader.

- Assemble a team.

- Define the deliverable.
- Plan and manage projects in order to optimize resources, timeframes, and budgets.
- Balance the constraints of scope, costs, speed of delivery and risk with the quality of the work.
- Manage competing deadlines and interests (multi-tasking) and delegate effectively.
- Manage several high level projects simultaneously.
- Solicit feedback, learn from it and incorporate the input into recommendations on how to move forward in addressing an issue.

Effectively manage and motivate a staff of individuals with varying backgrounds and skill levels.

- Effectively form teams.
- Use appropriate feedback approaches and reward systems to improve team and individual performance.
- Develop subordinates' technical skills.
- Demonstrate strong interpersonal skills in order to interact effectively with actuaries and non-actuaries.
- Solicit input and implement feedback.

Technical Skills and Analytical Problem Solving Competency

This competency is defined as: “Applying the actuarial knowledge, skills and judgment required to provide value-added services.”

Examples of this competency include the following:

Devise and recommend risk management strategies and tactics that optimize financial performance subject to your client’s tolerance for risk.

- Review government regulations and distill the knowledge into clear and useful advice to your client.
- Determine which actuarial models are most appropriate to the business problem being addressed.
- Calculate risk in complex or ambiguous situations and understand the potential rewards.
- Produce financial analyses that take into consideration the appropriate distribution of risks.

Demonstrate innovative and creative skills in problem solving taking into account broad issues beyond the specific subject matter at hand.

- Identify and quantify risks beyond the traditional modeled risks.

- Apply complex theories to real world applications.
- Be able to explain the drivers of the given results.
- Identify strengths and weaknesses of differing financial analytic approaches and apply them to actuarial problems in your area of practice

Anticipate and develop new applications for actuarial principles.

- Create and use new risk metrics to coincide with changes within your industry as well as the capital markets.
- Research and develop new models, technologies and tools.
- Learn new methodologies and understand the risks inherent in moving to these new methodologies.
- Understand and manage new risks as technology and society develop.

Demonstrate expertise with tools and knowledge relevant to your area of practice.

- Apply sophisticated modeling tools when appropriate from a cost, complexity and benefit perspective.
- Discover masked trends using data mining techniques.
- Use appropriate financial modeling techniques.
- Create software applications or spreadsheets that can be easily audited.
- Develop a framework to logically model and analyze situations with limited data or history.

Strategic Insight and Integration Competency

This competency is defined as: "Anticipating trends and their impact and strategically aligning actuarial practice with broader organizational business goals."

Examples of this competency include the following:

Demonstrate big picture thinking, incorporating economic, political, cultural and technological knowledge.

- Look beyond traditional silos of knowledge to understand and affect the bigger picture for your client.
- Research, recognize and take advantage of market opportunity.
- Develop a broader view in order to understand the actuarial issues of today's social issues.

Develop strategies to add value to your client's finances.

- Demonstrate knowledge of core business models and the potential risks that may prevent financial success.

- Understand your client’s risk tolerance and its effect.
- Differentiate between the technically correct approach and the approach that achieves the best business outcomes.
- Recommend business decisions that are accurate, timely, actionable and relevant based on the analysis results.

Partner with management to provide the vision to see a range of possibilities for the future.

- Anticipate and answer high level questions that affect business decisions.
- Influence business decisions by presenting both issues and solutions.
- Be proactive in making suggestions to co-workers and management (don’t wait for questions to be asked).

Demonstrate intellectual leadership.

- Be a continuous learner.
- Go beyond the technical aspect of a problem.
- Quickly assimilate new and emerging developments.
- Combine long term strategic thinking with decision making ability.
- Support effective decision-making.

Expand the scope in which actuaries can play an important role.

- Influence business decisions.
- Influence public policy makers on policies and programs that affect your industry.

Results-Oriented Solutions Competency

This competency is defined as: “Providing effective problem solving that addresses relevant business interests and needs.”

Examples of this competency include the following:

Focus on the desired results of your client, not the technical skills to get there.

- Translate complex actuarial issues and findings into business action.
- Recognize both top line and bottom line impact of recommendations.
- Distill the results of complicated models and formulas into actionable recommendations.
- Explain the immediate consequences and long-term effects of business decisions.

Demonstrate innovative and creative skills in problem solving taking into account broad issues beyond the specific subject matter at hand.

- Understand the political, social and legal social ramifications of issues.
- Explain the immediate ramifications and potential long-term consequences of a decision.
- Consider non-financial and non-technical factors when making business and product decisions.

Champion the implementation of recommendations and drive results from them.