2020 VIRTUAL ANNUAL MEETING & EXHIBIT

OCTOBER 26–29, 2020
Employing Emotional Intelligence to Create Diverse and Inclusive Teams

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Active participation in the Society of Actuaries is an important aspect of membership. While the positive contributions of professional societies and associations are well-recognized and encouraged, association activities are vulnerable to close antitrust scrutiny. By their very nature, associations bring together industry competitors and other market participants.

The United States antitrust laws aim to protect consumers by preserving the free economy and prohibiting anti-competitive business practices; they promote competition. There are both state and federal antitrust laws, although state antitrust laws closely follow federal law. The Sherman Act, is the primary U.S. antitrust law pertaining to association activities. The Sherman Act prohibits every contract, combination or conspiracy that places an unreasonable restraint on trade. There are, however, some activities that are illegal under all circumstances, such as price fixing, market allocation and collusive bidding.

There is no safe harbor under the antitrust law for professional association activities. Therefore, association meeting participants should refrain from discussing any activity that could potentially be construed as having an anti-competitive effect. Discussions relating to product or service pricing, market allocations, membership restrictions, product standardization or other conditions on trade could arguably be perceived as a restraint on trade and may expose the SOA and its members to antitrust enforcement procedures.

While participating in all SOA in person meetings, webinars, teleconferences or side discussions, you should avoid discussing competitively sensitive information with competitors and follow these guidelines:

- **Do not** discuss prices for services or products or anything else that might affect prices
- **Do not** discuss what you or other entities plan to do in a particular geographic or product markets or with particular customers.
- **Do not** speak on behalf of the SOA or any of its committees unless specifically authorized to do so.
- **Do leave** a meeting where any anticompetitive pricing or market allocation discussion occurs.
- **Do alert** SOA staff and/or legal counsel to any concerning discussions
- **Do consult** with legal counsel before raising any matter or making a statement that may involve competitively sensitive information.

Adherence to these guidelines involves not only avoidance of antitrust violations, but avoidance of behavior which might be so construed. These guidelines only provide an overview of prohibited activities. SOA legal counsel reviews meeting agenda and materials as deemed appropriate and any discussion that departs from the formal agenda should be scrutinized carefully. Antitrust compliance is everyone’s responsibility; however, please seek legal counsel if you have any questions or concerns.
Presentations are intended for educational purposes only and do not replace independent professional judgment. Statements of fact and opinions expressed are those of the participants individually and, unless expressly stated to the contrary, are not the opinion or position of the Society of Actuaries, its cosponsors or its committees. The Society of Actuaries does not endorse or approve, and assumes no responsibility for, the content, accuracy or completeness of the information presented. Attendees should note that the sessions are audio-recorded and may be published in various media, including print, audio and video formats without further notice.
David Marcotte – Coaching

EDUCATOR
David Marcotte –

EDUCATOR

ACTOR
David Marcotte – **Marcotte Coaching**

**EDUCATOR**  **ACTOR**  **MUSICIAN**
Expectations!

Knowledge  Feeling  Action  WIIFY
Key Points!

- An Introduction to EI
- Self-awareness
- Self-management
- Social Awareness
- Relationship Management
EI – What is it?

EI is a set of skills that define how effectively an individual notices, understands, reasons with, and manages their emotions and behaviors, and those of others.
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History of EI

Daniel Goleman
1995
History of EI

Daniel Goleman
1995
TIME
WHAT'S YOUR
EQ?

It's not your IQ. It's not even a number. But emotional intelligence may be the best predictor of success in life, redefining what it means to be smart.

TIME WARNER & TURNER: THE INSIDE STORY

DANIEL GOLEMAN
Author of Social Intelligence

Emotional Intelligence

Why It Can Matter More Than IQ

The #1 Bestseller
The Tenth Anniversary Edition

The Groundbreaking Book That Redefines What It Means to Be Smart
It’s not your IQ. It’s not even a number. But emotional intelligence may be the best predictor of success in life, redefining what it means to be smart.
87%
Productivity

Retention

ROI
256%
WIIFY?
If you were to divide yourself into three major divisions, IQ, EI, and Personality, which of the three would you have the greatest chance of changing and improving?
IQ | Personality | EI

- **Emotional Intelligence (EI)**
  - Able to grow and develop

- **Intelligence Quotient (IQ)**
  - Stable over lifetime

- **Personality**
  - Stable over lifetime
Four Competencies of EI
Actuarial Panel Discussion

• Margaret Resce Milkint

• Enrique Schulz, ASA, FCA, MAAA

• Kezia Charles, FSA, EA
Recruiting for Emotional Intelligence

Sample Interview Questions

Describe a time you were convinced you were right about something, but then came to change your mind. *(Self-awareness)*

Tell me about a time you made a mistake. What was the outcome? What did you learn? *(Self-management)*

Tell me about someone that is difficult for you to work with and what you’ve done to build a stronger relationship. *(Social Awareness)*

Describe the best relationship you’ve had with a previous boss. *(Relationship Management)*

SELF-AWARENESS
Accountable
Honest
Flexible
Responds creatively to challenges
Confident

SOCIAL AWARENESS
Empathetic
Aware of organizational dynamics
Service-oriented
Active listener

RELATIONSHIP MANAGEMENT
Collaborative
Capable of managing conflict
Able to lead change
Builds trust
Able to inspire

SELF-MANAGEMENT
Transparent
Goal-driven
Organized
Self-motivated
Able to handle difficulties and criticism