



Institute  
and Faculty  
of Actuaries

# Beyond the Technical: Coaching Tools for Actuaries

Simon Warsop

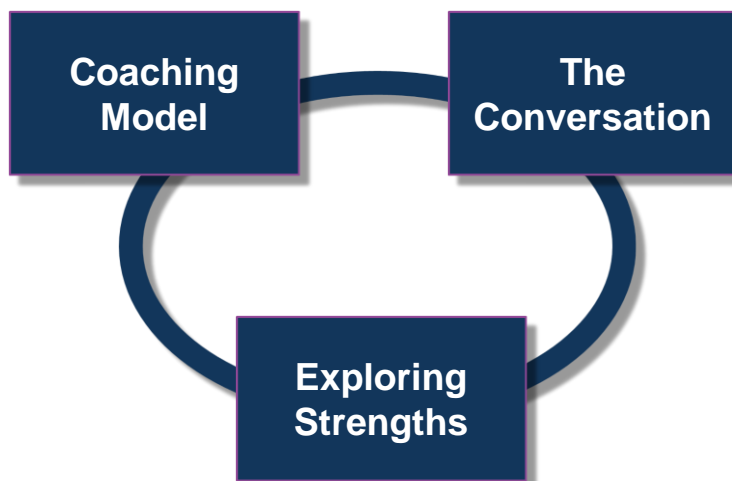


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# Beyond the Technical Coaching Tools for Actuaries

Simon Warsop

Expertise  
Mentorship  
Thought leadership  
Progress  
Community  
Sessional Meetings  
Education  
Working parties  
Volunteering  
Research  
Shaping the future  
Networking  
Professional support  
Enterprise and risk  
Learned society  
Opportunity  
International profile  
Journals  
Support



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## Facilitation Styles – John Heron

### *Authoritative Interventions*

- |                     |                                       |
|---------------------|---------------------------------------|
| <b>Prescriptive</b> | Give <b>advice</b> , direction        |
| <b>Informative</b>  | Give <b>information</b> , instruction |
| <b>Confronting</b>  | <b>Challenge</b> behaviour, attitude  |



### *Facilitative Interventions*

- |                   |  |
|-------------------|--|
| <b>Cathartic</b>  | Help understand, express, overcome <b>emotions</b> |
| <b>Catalytic</b>  | Help reflect, <b>discover</b> , learn              |
| <b>Supportive</b> | Build <b>confidence</b> , praising                 |

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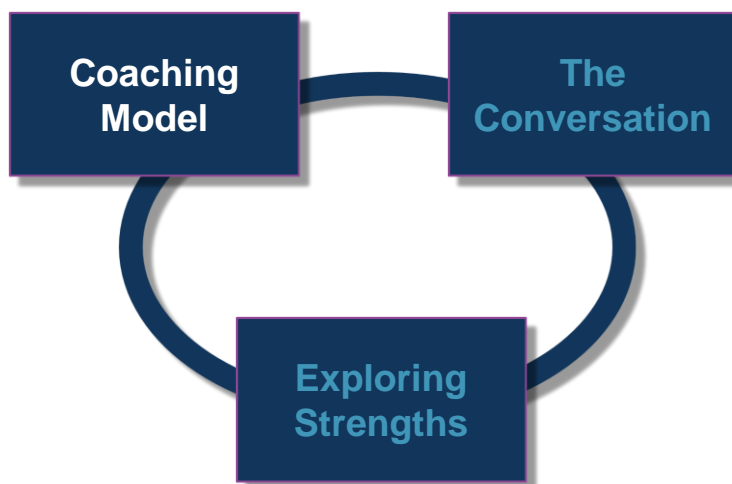
## Ice Breaker

Discuss with your neighbour how to intervene when:

1. A colleague says they are afraid to present at a meeting
2. A stranger asks you the time
3. Your friend tells you they have lost their job
4. Your child runs into a busy road
5. A team member asks how to get a promotion
6. A colleague will not appoint an applicant based on their ethnicity



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## “Standard” Coaching Model – IGROW

<b>Issue</b>	What is the <b>issue</b> ? Catalyst or cathartic?
<b>Goal</b>	What <b>goal</b> do you want to achieve? <b>Why? Care:</b> You might get your wish!
<b>Reality</b>	What is the <b>reality</b> today? <b>Why</b> does this reality exist?
<b>Options</b>	What could move you toward your goal? <b>What else?</b>
<b>Wrap up</b>	What will you actually do? Make this SMART!



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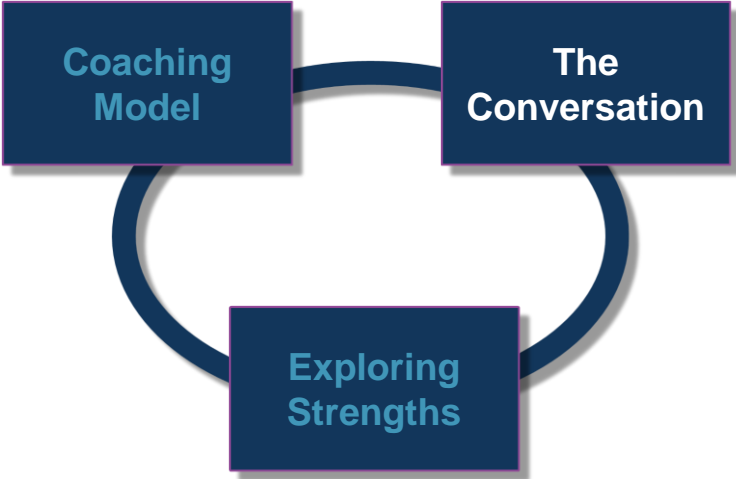
## SMART

When agreeing actions, objectives or goals:  
Make them **SMART**

- *Specific*
- *Measurable*
- *Achievable*
- *Relevant*
- *Timed*
- *Specific*
- *Measurable*
- *Aligned*
- *Realistic*
- *Timed*



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### Choosing your victim(!)

Will Benefit		
Won't Benefit		
	You can't	You can



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## Extremely Open Questions

- |                         |                  |
|-------------------------|------------------|
| • <b>Closed</b>         | Are you well?    |
| • <b>Open</b>           | How are you?     |
| • <b>Extremely open</b> | What's going on? |



- |                         |  |
|-------------------------|--|
| • <b>Closed</b>         | Did that meeting make you feel frustrated? |
| • <b>Open</b>           | How did you feel following that meeting?   |
| • <b>Extremely open</b> | How is all this stuff making you feel?     |

- |                         |                              |
|-------------------------|------------------------------|
| • <b>Closed</b>         | Do you want chicken for tea? |
| • <b>Open</b>           | What do you fancy for tea?   |
| • <b>Extremely open</b> | What cross roads are you at? |

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## Feedback – SBI

### *Situation*

When we were in the meeting with Bill on Tuesday...

### *Behaviour*

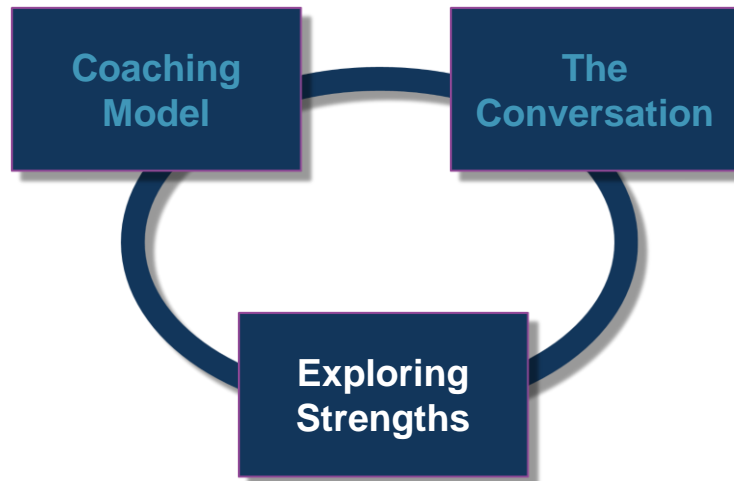
...you said "Bill, your idea is ridiculous!"...

### *Impact*

...and that made me feel uncomfortable.

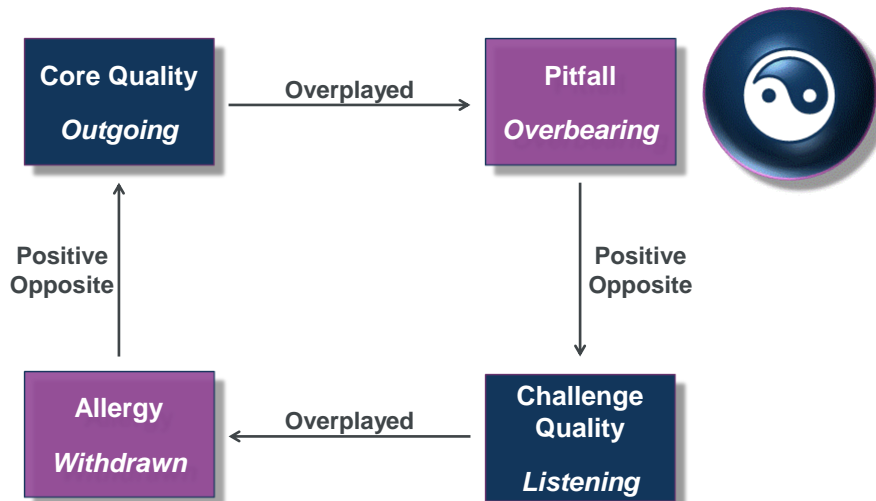


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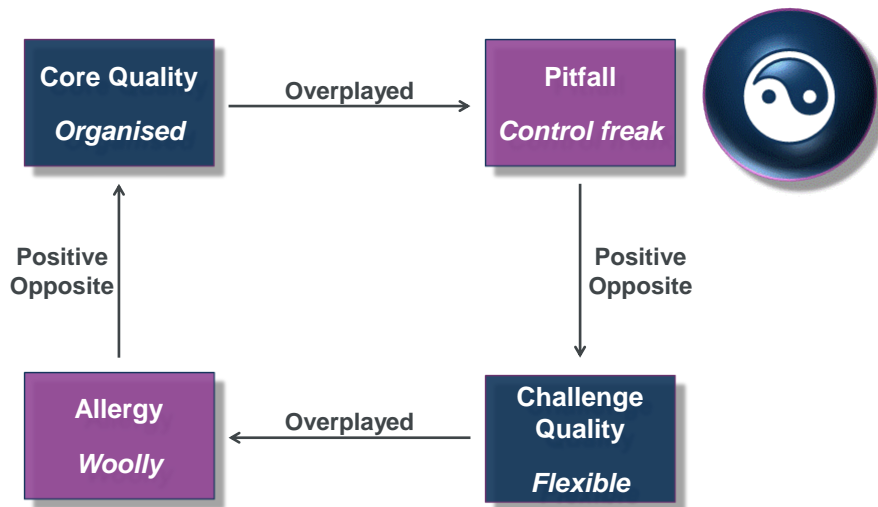
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## Core Qualities – Daniel Ofman



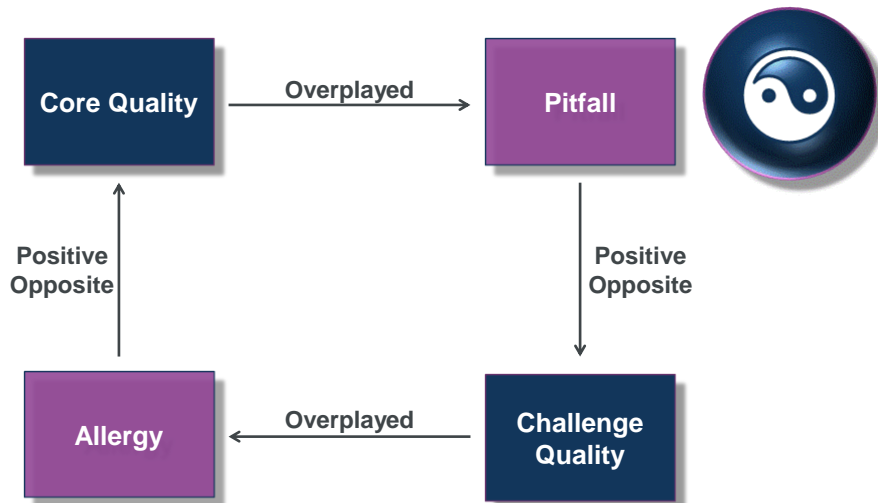
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## Core Qualities 2



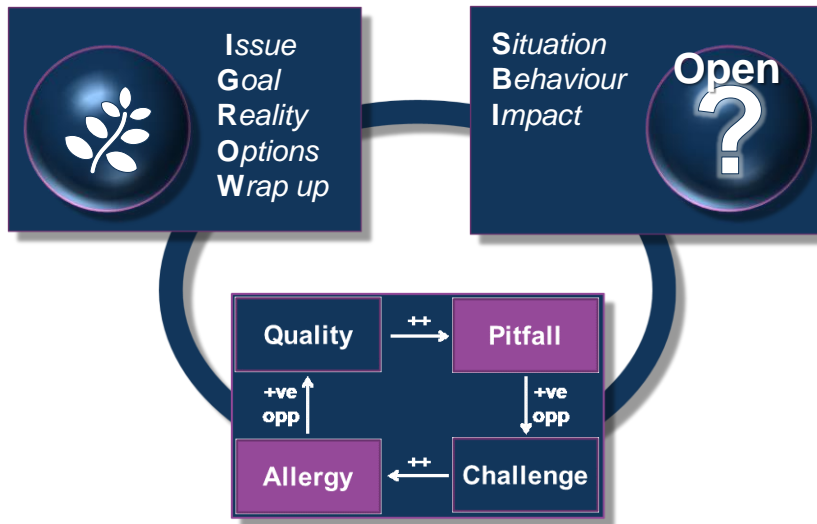
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## Core Qualities – Now you try



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## Final Word

Tools and models are useful but...

...the most important thing is...



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# Questions



# Comments

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