



WITH TED SEIDES & RAHUL MOODGAL

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Learning Outcomes for Creating Personal Leverage

Cohort members should be able to:

- I. Apply Simon Sinek's "Golden Circle" framework to their personal and professional goals
- II. Distinguish between telic and atelic activities and how each contribute to accomplishing long-term goals
- III. Describe the Rocks, Pebbles, Sand framework and how our time can get absorbed by unimportant tasks.
- IV. Leverage the GPS framework for setting goals, measuring success, and achieving outcomes
- V. Describe the \$10K framework and the relationship between skill and leverage
- VI. Provide examples of \$1 through \$10K work in your role and across the investment office
- VII. Ask questions to define your investment office's \$10K portfolio
- VIII. Apply best practices to build personal leverage through "tracking tools," calendar management, saying "no", delegation, time away from the office, and habit change.

Learning Outcomes for Communication and Networking

Cohort members should be able to:

- I. Describe the principles of great public speaking
- II. Understand how to motivate an audience to listen
- III. Present effectively to a small group
- IV. Describe the key components of active listening including noting distractions, mirroring, validation, and empathy
- V. Recognize phrases conducive to active listening
- VI. Remember the elements of writing from high school
- VII. Adapt writing principles to a virtual world
- VIII. Describe and implement the framework for effective networking
- IX. Understand networking rules of thumb and common misconceptions

Learning Outcomes for Leadership & Management

Cohort members should be able to:

- I. Differentiate between leadership and management and the common frameworks associated with each
- II. Create practices and policies around the shared values of an organization
- III. Successfully create a vision statement, a values statement, and understand the difference between the two
- IV. Establish standards of conduct across an organization
- V. Leverage frameworks for effective communication within a team
- VI. Define “fanness” and understand its importance as a universal behavior for all leaders
- VII. Understand frameworks for inspiring and motivating a team
- VIII. Incorporate shared values into your interviewing and hiring processes
- IX. Leverage frameworks for onboarding new team members
- X. Design an organization intentionally across office space, functional roles, and meetings
- XI. Use frameworks for project management
- XII. Apply lessons in delivering feedback to develop talent

Learning Outcomes for Interviewing

Cohort members should be able to:

- I. Define interviewing core principals including purpose, preparation, set-up, active listening, and feedback
- II. Describe why interview preparation leads to successful conversations and implement strategies to better prepare for interviews
- III. Determine how to prepare for a successful interview, including both content and context.
- IV. Successfully assign roles for team members to maximize participation and optimize meeting outcomes
- V. Distinguish between structures for introductory meetings versus those with an established relationship
- VI. Create processes to facilitate feedback following interviews
- VII. Describe common interview best-practices including mindset, considerations in the interview, techniques for asking questions, and gathering feedback
- VIII. Describe the search process for a CIO seat

Learning Outcomes for Decision Making

Cohort members should be able to:

- I. Understand the difference between a good decision and a good outcome
- II. Identify the challenges of decision making, including belief formation, bias, and inaccurate assessments
- III. Explain the framework for making a good decision using possibilities, probabilities, and preferences
- IV. Describe a decision making unit and the components of an effective decision making unit
- V. Define cognitive diversity and its influence on the decision making process
- VI. Describe base rates and their importance in making a good decision
- VII. Construct a pre-mortem analysis framework
- VIII. Describe a quitting decision and how it compares to other decision types
- IX. Describe common pitfalls made by money managers and asset allocators in decision making
- X. Create a feedback loop for improving decision quality for you and your investment team

Learning Outcomes for Investment Frameworks

Cohort members should be able to:

- I. Understand the first principals and limitations of the “Yale Model”
- II. Identify the challenge, framework, and suggestions from peers to improve governance
- III. Identify the common approach, framework, and suggestions from peers to improve sourcing
- IV. Identify the common approach, framework, and suggestions from peers to improve due diligence
- V. Identify the common approach, framework, and suggestions from peers to improve portfolio construction
- VI. Identify the common approach, framework, and suggestions from peers to improve incremental opportunities to add value