



WITH TED SEIDES & RAHUL MOODGAL

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Learning Outcomes for Interviewing Money Managers

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 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. Leverage the GPS framework for setting goals, measuring success, and achieving outcomes
- IV. Describe the \$10K framework and the relationship between skill and leverage
- V. Provide examples of \$1 through \$10K work in your role and across the investment office
- VI. Ask questions to define your investment office's \$10K portfolio
- VII. Leverage time and calendar management best-practices including "tracking tools," pre-commit calendars, delegation frameworks,

Learning Outcomes for Improving Decision Making in the Investment Office

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 Dissecting Modern 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