

# 7<sup>TH</sup> ANNUAL CASE COMPETITION KICKOFF MEETING

Bruin Actuarial Society



BAS.00

BRUIN ACTUARIAL SOCIETY

# Agenda

- Why participate in the Case Competition?
- Judging Criteria & Presentation Structure
- Intro to Case Comps Workshop: Recap of Tips
- Formatting Excel Files and Writing the Executive Summary
- Logistics (dates, rules, etc.)
- Form a team and sign up!

# Why participate?

- Exposure to real world actuarial work
  - Develop skills you wouldn't otherwise learn in the classroom
- Practice your communication – written and verbal
- Get to know your peers
- Network with firm representatives
- Gain relevant experience for recruiting

# Judging Criteria

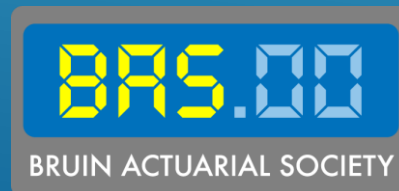
- Organization
- Content
- Delivery
- Q&A
- Professionalism

# Presentation Structure

- Create a PowerPoint to present your solutions
- 10 minute presentation
  - Each team member must speak for at least 1.5 minutes
- ~10 minute Q&A session after the presentation

# INTRO TO CASE COMPS WORKSHOP

## RECAP OF TIPS



# Things to Keep in Mind

- Assume you are presenting to upper level management
  - They may not have much technical knowledge
  - KISS: “Keep it simple, stupid”
  - Less concerned with calculations, more concerned with the implications of your results
    - Think outside the box when you’re interpreting your results
- Have a balance of slides with text and visuals

# Slide Design Tips - Text

- Your PowerPoint should serve as a visual aid
  - It is **NOT** the primary focus of your presentation
  - Your audience should be more focused on listening to what you're saying
- Start with an agenda
- Don't clutter your slides with text
  - Your bullet points don't always need to be complete sentences
  - Make sure that they're still coherent

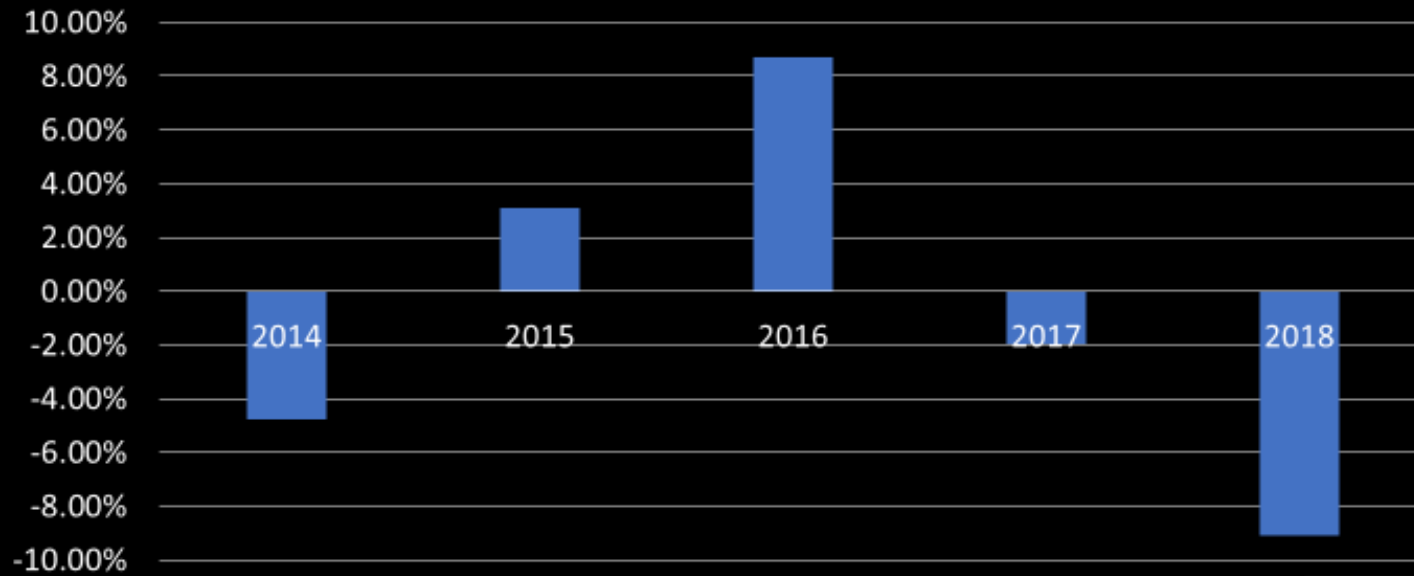


# Slide Design Tips - Visuals

- Text/charts/graphs should contrast with the background
- Use color coding to categorize your information
  - Ex: red for negative figures, green for positives
  - Use the same color scheme throughout
- Again, keep it simple!
  - Try to round to at most two decimal places
  - Adjust the axes of your graphs to make them easier on the eyes

# Slide Design Tips – Visuals

## Loss Development Method: Reserve Errors



# Slide Design Tips – Visuals

## Loss Development Method: Reserve Errors



# Presentation Tips

- Practice, practice, practice!
- Rehearse your part out loud, practice transitions with your teammates
- Familiarize yourself with the *entire presentation*, not just your part
  - This will come in handy for the Q&A portion
  - Having more context is always useful
- Project your voice, speak clearly, be conscious of how fast you're talking

## For More Tips...

Look for the “Introduction to Case Competition Workshop” slides on our website

[www.math.ucla.edu/~actuary](http://www.math.ucla.edu/~actuary)

# EXCEL FILES AND THE EXECUTIVE SUMMARY

# Excel Files

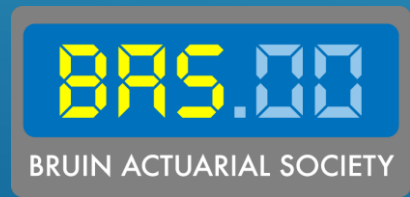
- You must submit your Excel file along with your presentation slides and Executive Summary
  - Submit as .xls/.xslm
- Make sure it is easy to read
  - Make sure that there is not extra clutter in your file
  - Keep a “clean” version to submit which only has your answers in it

# Executive Summary

- Check our website for examples from past case competitions
- Use this to summarize what you have done and your answers
  - Submit this as a PDF



# CASE COMPETITION LOGISTICS



# First Round on Friday, 1/18

- Presentations start at 6:00pm
  - We will email out a link to sign up your team for a time slot
- BAS officers will serve as judges
- Deadline to submit deliverables: **Thursday, 1/17 @ 6:00PM**
  - Late submission will not be accepted
  - *No exceptions will be made*

# Final Round on Tuesday, 1/22

- Presentations start at 6:00pm
- Will feature other UC schools
- All members invited to come watch
- Reception and networking after presentations
- Deadline to submit deliverables: **Tuesday, 1/22 @ 10:00AM**
  - Late submission will not be accepted
  - *No exceptions will be made*

# Deliverables

- Presentation slides (.ppt/.pptx AND .pdf)
- Excel Files (.xlsx/.xlsm)
- Executive Summary (.pdf)
  - Condensed business proposal, 2 pages max
- Attach all in the same email and send to [bruinactuaries@gmail.com](mailto:bruinactuaries@gmail.com)
  - Subject: 2019 BAS CASE COMPETITION TEAM [your team number] Round 1/Final Round Presentation

# Create a Team

- Must have at least two freshmen, sophomores, or first year transfers
- All participants must be paid BAS members
  - If you are NOT a paid member you must become one before 1/18 to participate
  - Pick one person to be the main point of contact for your team
- Exchange contact information with your teammates

**Register your team at the end of this meeting!**

# Paying for Membership

- \$40 – access to Case Competition, Spring Banquet, paid members mailing list
- Ways to Pay:
  - Venmo (@BruinActuarialSociety)
  - Paypal
  - Cash (email [bruinactuaries@gmail.com](mailto:bruinactuaries@gmail.com) to schedule payment)
- More info can be found on our website

# Last Reminders

- You MUST submit all deliverables on time!
  - No exceptions
- You are NOT allowed to seek help outside of your team for work on this case
  - Everything you present must be your own
  - i.e. no help from professors, parents...

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# Questions?

Teams can sign up here:

<https://bit.ly/2sj9tan>

**Note:** You must sign up before you leave—we will be closing signups at the end of this meeting!