**AIG**

Employee: Vincent Zhu （朱晋枫）(5281797)

Date of Conversation: _____

Reviewing Manager: Kellie Zhang （章怡）(5232229)

Last Update: 01/24/2018

**INSTRUCTIONS:** Please use this guide for your 2017 Year-End Performance Review Conversation. Space is provided below for any notes you may take during the conversation.

# Section I: 2017 Goals

## Goal 1

| | |
|---|---|
| **TITLE:** | DSA Re |
| **WEIGHT:** | 80 |
| **DESCRIPTION:** | 1. Provide modeling supports to various key stakeholders for DSA-Re2. Project Jupiter Phase III development - CAULReview and validate the GGY AXIS models developed by the external consultants through the development of Excel Testware validation tools and reconciling results against GGY AXIS model outputs.3. Support capitalization plan development for DSA Re and provide analytical support for capital strategy and dividends planning. |

**Self Evaluation:** **Fully Met**

**Self Comment**

For CAUL testware validation, I got involved in this project from the very beginning. Things I have done include: - Extracted tables from the ARCVAL system - Built rate tables based on the ARCVAL info and product specifications - Leveraged the Phase II UL Testware for CAUL This project provided me a thorough understanding about UL product as well as the logic for projecting one single policy. Also learned the way/logic about how to dig in when reconciliation results do not look good. We fully met the intermediate goal (reconciling 3 Vantage testbeds) for CAUL project before it was put on hold by Oliver Wyman. Besides, I was also engaged in other Jupiter Phase III testware validation projects for other projects (Appraisal/CFT basis for ROP/UL/WL): - Reviewed the product features and the previous testwares - Incorporated the new assumptions into the testwares and reconciled It helped build a sound knowledge of the underlying products and the related GGY AXIS models through all the testware validation projects. This project helped OW to verify all the functionality and product features have been built into GGY AXIS models correctly.

## Goal 2

| | |
|---|---|
| **TITLE:** | GGY AXIS |
| **WEIGHT:** | 20 |
| **DESCRIPTION:** | Continue to learn all the relavent functionalities/features of Health model within GGY AXIS to provide support to evaluation/stress testing. |

**Self Evaluation:** **Fully Met**

**Self Comment**

On track. Got familiar with both the interface and functionality of GGY AXIS and ready for performing more complex analysis by using GGY AXIS next year.

## Additional Questions

**Please indicate if you contributed to the achievement of goals outside your area of responsibility and describe your contributions. If this is not applicable for you this year, please indicate so in the comments box below.**

**Self Comment**

Other than the Goal on the list, I got intensively involved in the Corporate Model - data consolidation project: - Self-studied the Access VBA via Google. - Implemented the code-writing for aggregation process and also tested it - Discussed with OW to refine the coding based on additional requests throughout the project. - Created a macro to implement the quarterly to annual conversion to feed the aggregation result into Run Control Workbook. - Helped other team members if they have any issues on Access macro. It was really grueling at the beginning. But I managed to bring myself up to speed with the knowledge of MS Access macro within a week and being able to apply the knowledge to various situations, such as incorporating some risk-checking mechanism which was not requested by OW at front, allowing for a high level of flexibility within the macro etc. Personally, I reckoned the debugging process was challenging while helpful to consolidate the macro skill. In the end, I gave a brief walk-through about all the macro used for aggregation process to Oliver Wyman over the teleconference.

**What was your biggest disappointment in 2017?**

**Self Comment**

At times as a new joiner, the volume of new information to process and understand was on occasion a little overwhelming, however as I have gained experience, I have found the processing of new information a lot easier.

**What was your proudest achievement in 2017?**

**Self Comment**

Being a quick-learner: Within a short time, I was able to pick up how the previous UL testware worked and had the capability of working on my own to leverage it. Also, I picked up the Access VBA skill from scratch quickly and made it be a part of my expertise so that I was able to help out the team whenever we would like to perform an automation process in the Access database.

## Manager's Overall Performance on Goals

**Overall, how would you evaluate Jinfeng Zhu's performance on their goals?**

**Manager Evaluation:** **Above & Beyond**

**Did Jinfeng Zhu contribute to the achievement of goals outside their own area of responsibility?**

**Manager Evaluation:** **Significant Contribution**

**Comments on Jinfeng Zhu's overall performance:**

**Manager Comments :**

Vincent has made significant contribution to a couple of projects that he has been assigned, namely corporate model data aggregation process, CAUL GGY AXIS assumption table build, and phase III Jupiter testware validation for ROP, UL and WL. In a very short time, Vincent has gained expertise and became a knowledge source for programming related issues the team may encounter. Vincent has also exhibited great communication and presentation skills during weekly catch up meeting with external consultants and has gained respect both in and out of the organization. In terms of work attitude, Vincent has taken great ownership of the projects assigned and has been a very reliable and trustworthy in meeting expectations as well as deadlines. Overall, Vincent has exceeded my expectation for him, especially as an entry level analyst in our team.

# Section II: Behaviors That Matter - Self & Manager Review

| Behavior | From Self | From Manager |
|---|---|---|
| able to anticipate problems | In-between | In-between |
| able to apply the right level of detail | In-between | In-between |
| able to get things done in the organization | Fits Perfectly | Fits Perfectly |
| able to value diversity of people and places | Fits Perfectly | Fits Perfectly |
| articulate and clear | In-between | Fits Perfectly |
| collaborative and helpful | Fits Perfectly | Fits Perfectly |
| energetic and engaged | Fits Perfectly | Fits Perfectly |
| focused in stressful situations | Fits Perfectly | Fits Perfectly |
| focused on what matters most | Fits Perfectly | In-between |
| generous in sharing credit | Fits Perfectly | Fits Perfectly |
| good at building relationships | Fits Perfectly | Fits Perfectly |
| open to new ways of doing things | In-between | Fits Perfectly |
| reliable in meeting commitments | Fits Perfectly | Fits Perfectly |
| respected by clients | Not Applicable | Not Applicable |
| the source of many good ideas | In-between | Fits Perfectly |
| thoughtful and decisive | Fits Perfectly | In-between |
| willing to admit mistakes | Fits Perfectly | Fits Perfectly |

## Strengths

| STRENGTHS - From Self | STRENGTHS - From Manager |
|---|---|
| able to get things done in the organization | articulate and clear |
| energetic and engaged | collaborative and helpful |
| open to new ways of doing things | reliable in meeting commitments |

## Weaknesses/Impact

| WEAKNESSES/IMPACT - From Self | WEAKNESSES/IMPACT - From Manager |
|---|---|
| able to anticipate problems (Mild ) | able to anticipate problems (Moderate ) |
| able to apply the right level of detail (Mild ) | able to apply the right level of detail (Mild ) |
| the source of many good ideas (Mild ) | thoughtful and decisive (Mild ) |

## Additional Questions

**Please use the comments box below to add any comments relating to your strengths and weaknesses (the "how") for 2017**

### Self Comment

Strengths: Energetic and engaged: enjoyed the work and was willing to learn more. Open to new ways of doing things: more about technical aspect, e.g. coming up with an efficient way to write formula or macro. Able to get things done in the organization: things (even files on the laptop) could be handled in an organized fashion. Weaknesses: Able to apply the right level of detail: Less experience of working with senior level staff. Occasionally went into too details. The source of many good ideas/Able to anticipate problems: not familiar with all the projects yet, hence can barely contribute many thoughts on them.

**Please describe the most important thing that the employee could do to improve his/her performance.**

### Manager Comments :

One thing that can be improved from observing Vincent's performance for the past few months is the ability to anticipate problems. For example in the corporate model data aggregation project, the key is to first understand what all the participants (including NY team/consultants/other work streams) are trying to achieve ultimately and how it relates to the work on hand. The earlier the awareness, the easier it is to anticipate potential issues down the stream. This is something that Vincent can keep in mind for his development next year, but this does not discredit his great performance at completing the work in hand.

Conversation Notes