



LEAD: ANALYST TRACK Q4

Learn, Elevate, Apply, Develop

BRIDGE
INVESTMENT
GROUP

Executive Guest Speaker:



ISELA ROSALES

Managing Director, Global Head of
Sustainability & Responsibility

LEAD - ANALYST TRACK

Q1 – Foundations for Success

- Bridge Values and Departments
- Performance Expectations
- Career Progression and Opportunities

Q2 – Time Management and Organization

- Prioritizing Tasks
- Multitasking Myth
- Enhance efficiency to improve work-life balance

Q3 – A Practical Approach to Analytical Thinking

- Enhance ability to break down complex problems into manageable components
- Discuss analytical frameworks to real-world scenarios
- Acquire skills to draw meaningful insights and make informed decisions based on data

SESSION AGENDA

Q4 – Identify, Create, and Manage Impactful Goals



➤ Brief review of previous session content.



➤ Pro-Tips on how to set goals that align with objectives.

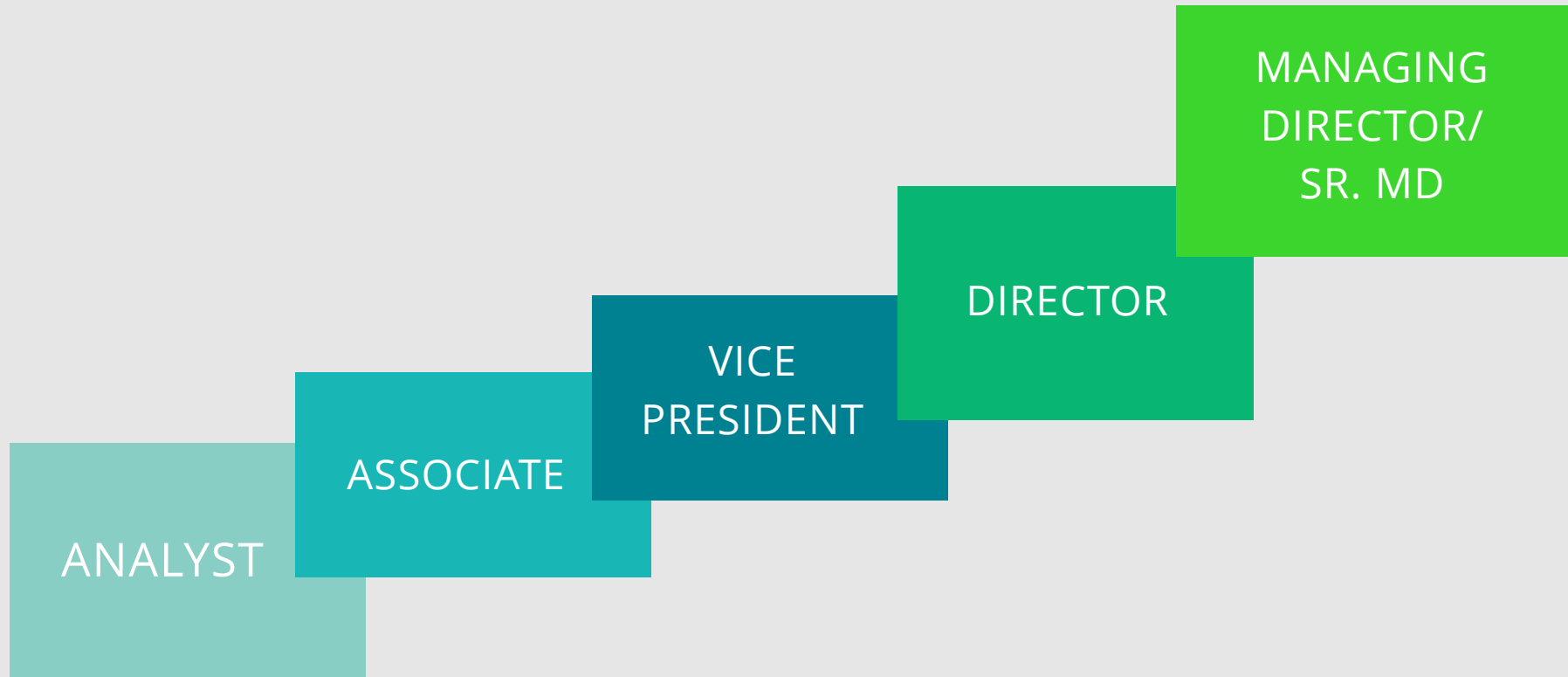


➤ Maximize your goals by utilizing the “Stretch” technique.



➤ Walk through the Miller's Pyramid of Competence.

Q1 - CAREER PATH PROGRESSION



Q1 - PERFORMANCE EXPECTATIONS - ANALYST

	Exceptional Written & Verbal Communication	DEI & B Mindset	Critical Thinking Skills	Builds Relationships	Subject Matter Expert	Works Autonomously
Analyst I	✓	✓				
Analyst II	✓	✓	✓	✓		
Analyst III	✓	✓	✓	✓	✓	✓

Prioritize

Q2 - TIME MANAGEMENT

A. Most Important

B. Important

C. Least Important

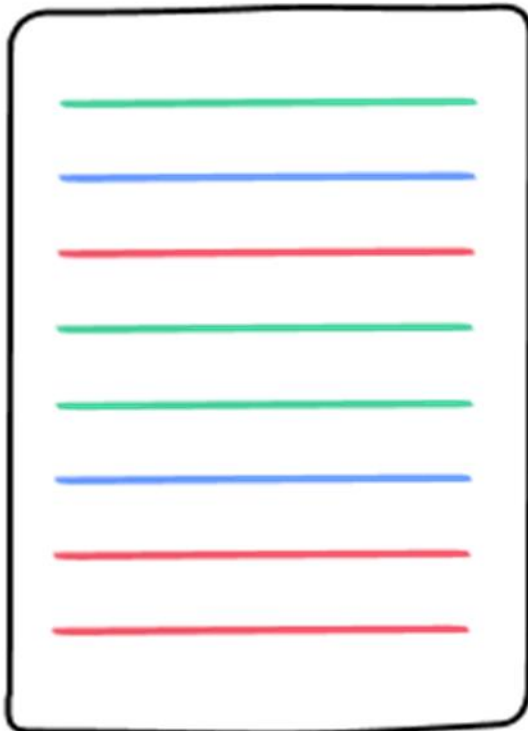
Unsorted



Step One



Step two



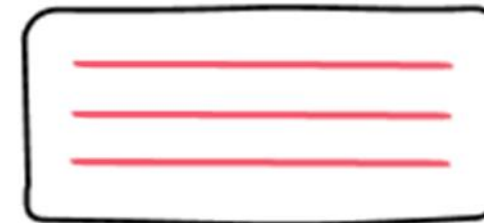
A.



B.



C.



A1.



A2.



A3.



B1.



B2.



B3.



C1.



C2.



C3.



Q3 - COMPUTATIONAL THINKING

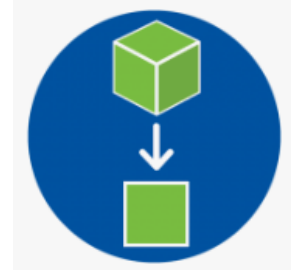
Pattern Recognition

Analyzing and looking for a repeating sequence



Abstraction

Remove parts of a problem that are unnecessary.



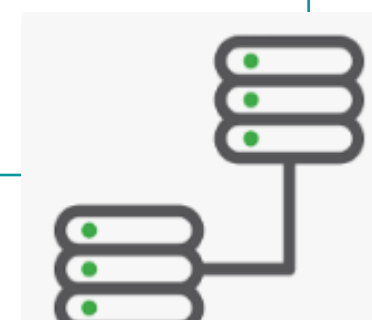
Decomposition

Breaking big problems into smaller, more manageable problems



Algorithm Design

Step-by-step instructions on how to complete a task



NEXT SECTION: Q4

**Identify, Create, &
Manage Impactful Goals**

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Set Goals
(Outcomes)

Q4: CREATE GOALS

S

M

A

R

T

SPECIFIC

You need to be clear on what you want to accomplish.



MEASURABLE

The goals should be quantifiable. For example, generate one lead per month.



ACHIEVABLE

The goals should not be too easy or too hard. Set ambitious, but realistic targets.



RELEVANT

The target should align with your business goals.



TIME-BOUND

Set a time frame and/ or a clear deadline for achieving your goals.



SHORT-TERM GOALS VS LONG-TERM GOALS

SHORT-TERM GOALS

- Duration: 0-2 years
- Targeted
- Measurable
- Specific and Focused

LONG-TERM GOALS

- Duration: 3-5 years
- Progressive
- Strategic
- Sequential Layers

INDEPENDENT ACTIVITY

1. Focusing on your department and your job title, write down one or two long-term goals you'd like to achieve.

2. Next, write down a short-term goal that needs to be achieved prior to attaining the long-term goal.

3. Stretch The goal!

Examples:

- Become Vice President.
- Create a new Business Process.
- Develop a new Strategic Relationship.

Example:

- Long-Term Goal: Become Vice President.
- Short-Term Goal: Promote to Associate
 1. Display Ownership in Area of Expertise
 - a. Identify Area
 - a. Gain expertise/Certificates
 - b. Share goal with Manager

STRETCH GOALS

People who set **difficult** goals are 34% more likely to love their jobs.

www.leadershipiq.com



Why? It fosters a sense of engagement & fulfillment.

DEFINITION:

Ambitious targets that push individuals or teams beyond their current capabilities, designed to inspire greater performance and innovation by challenging them to achieve more than what they initially thought possible.

Stretch Goal

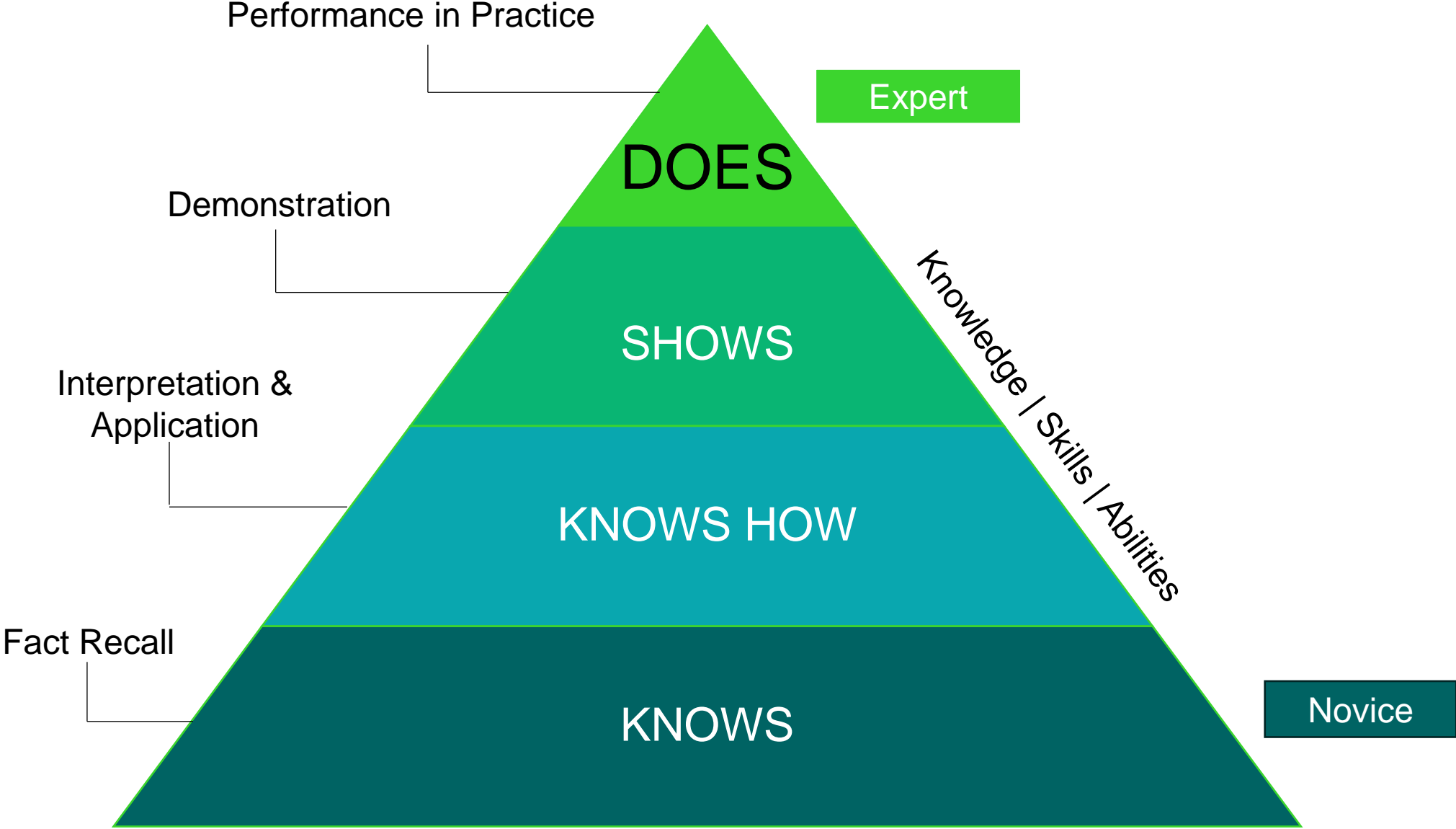


SMART Goal

BENEFITS:

1. Enhanced Motivation
2. Innovation & Creativity
3. Improved Performance
4. Skill Development
5. Resilience Building

Q4: MILLER'S PYRAMID OF COMPETENCE



Business Goal - Networking Event



PERFORMANCE EXPECTATIONS - ASSOCIATE

	Sets a positive example inside and outside of the office	DEI & B Mindset	Proven Solid Relationships across Org	Exhibits Accountability	Display Critical Thinking Skills	Ownership in Area of Expertise
Associate I	✓	✓				
Associate II	✓	✓	✓	✓		
Associate III	✓	✓	✓	✓	✓	✓

IN CONCLUSION:

THE REASON WHY WE NEED BOTH STRETCH GOALS AND SMART GOALS IS THAT AUDACIOUSNESS, ON ITS OWN, CAN BE TERRIFYING. IT'S OFTEN NOT CLEAR HOW TO START ON A STRETCH GOAL. AND SO, FOR A STRETCH GOAL TO BECOME MORE THAN JUST AN ASPIRATION, WE NEED A DISCIPLINED MINDSET TO SHOW US HOW TO TURN A FAR-OFF OBJECTIVE INTO A SERIES OF REALISTIC SHORT-TERM AIMS.

CHARLES DUHIGG

WRAP-UP: WHAT WE COVERED



Pro-Tips on How to Set Goals

- Start with the end in mind
- Create a Clear Roadmap
- Consider & Be Prepared for Obstacles




Stretch Your Goals

- Supports Big Thinking and Innovation
- Develop Creative Techniques
- Achieve Breakthrough



Ownership in Area of Expertise

- Know where you are & where you want to be
- Create and Maintain Short & Long-Term Goals
- Practice Skills to move from Novice to Expert



QUESTIONS? COMMENTS?

THANK YOU FOR ATTENDING!

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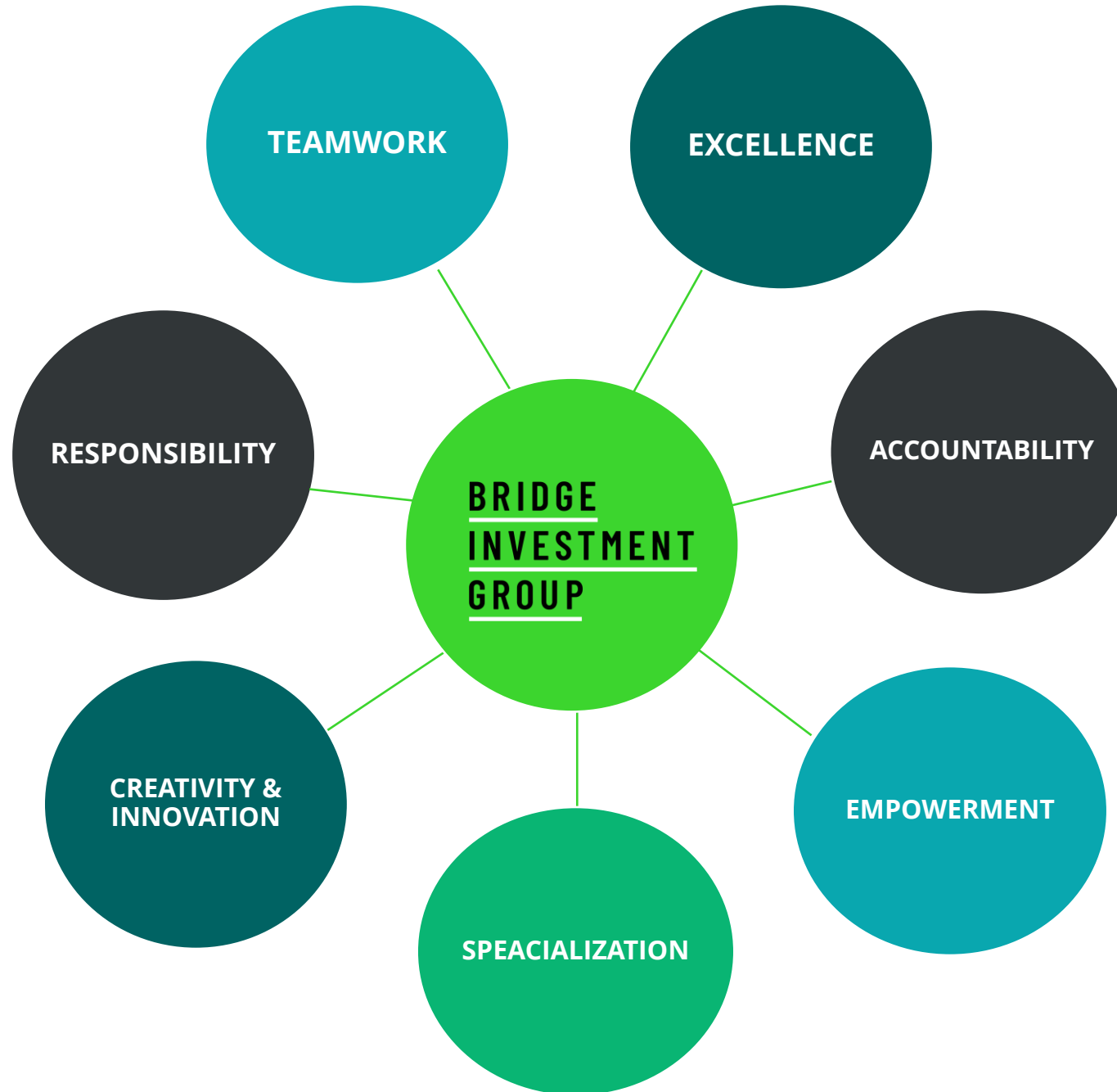
APPENDIX

INTRANET

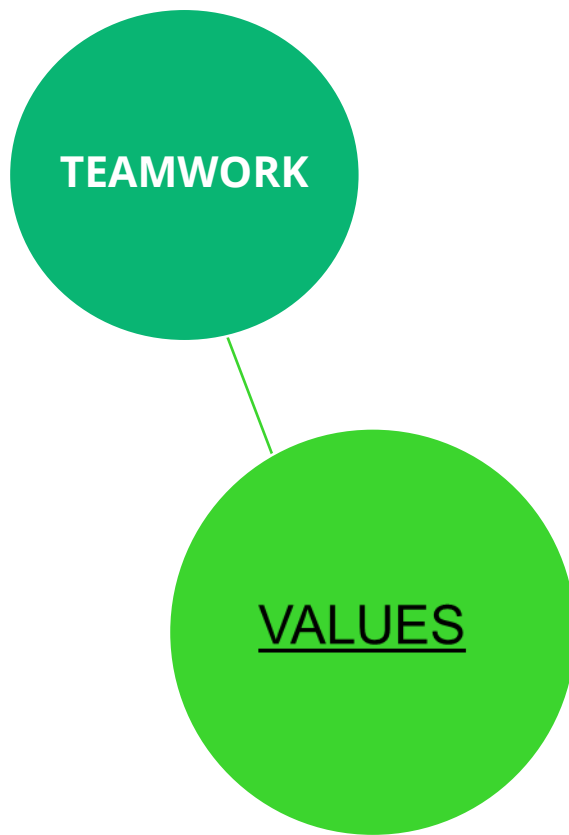
The one-stop shop for all Bridge resources



ONE BRIDGE - Living Our Values

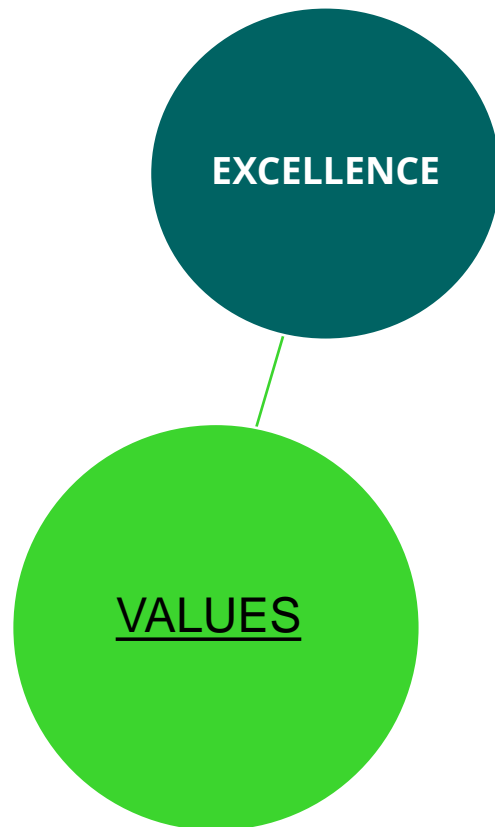


ONE BRIDGE - Teamwork



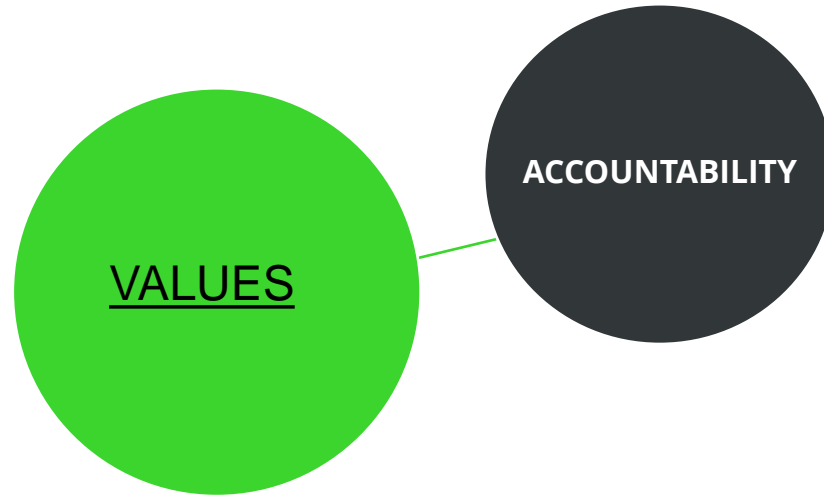
- We emphasize teamwork in everything we do.
- We thrive on collaboration, hard work and open and honest communication.

ONE BRIDGE - Excellence



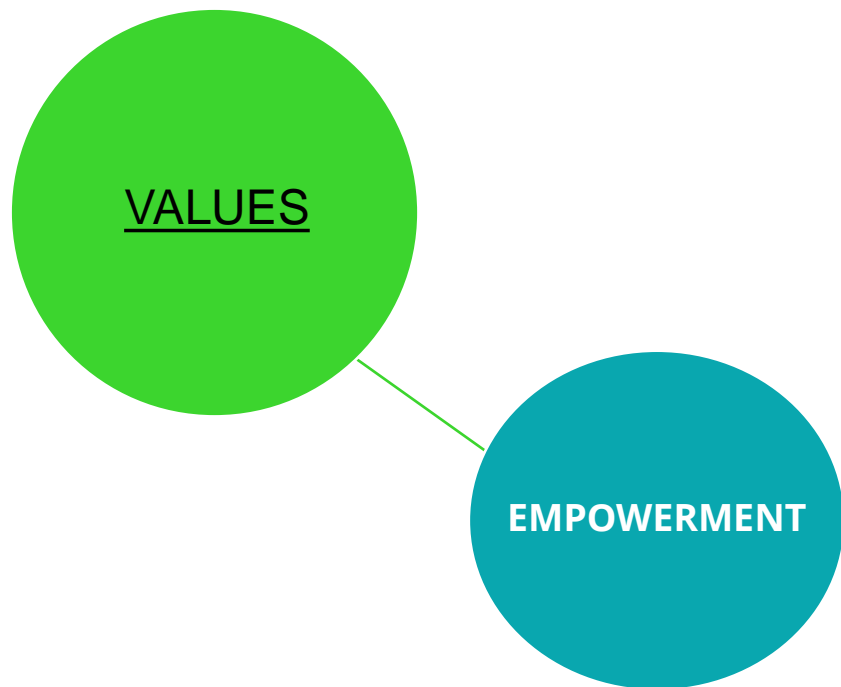
- We strive to be the best performing firm in our industry.
- We take pride in our performance and celebrate our achievements.
- We do what is right – for the right reasons.

ONE BRIDGE - Accountability



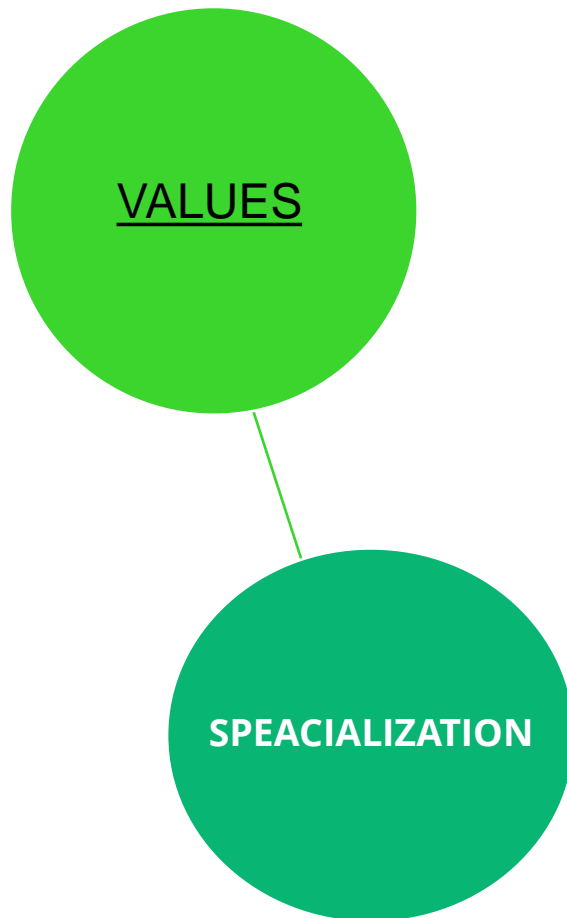
- We stand behind our word and strive for continuous improvement in all that we do.
- We face facts and realities, and we embrace challenges.

ONE BRIDGE - Empowerment



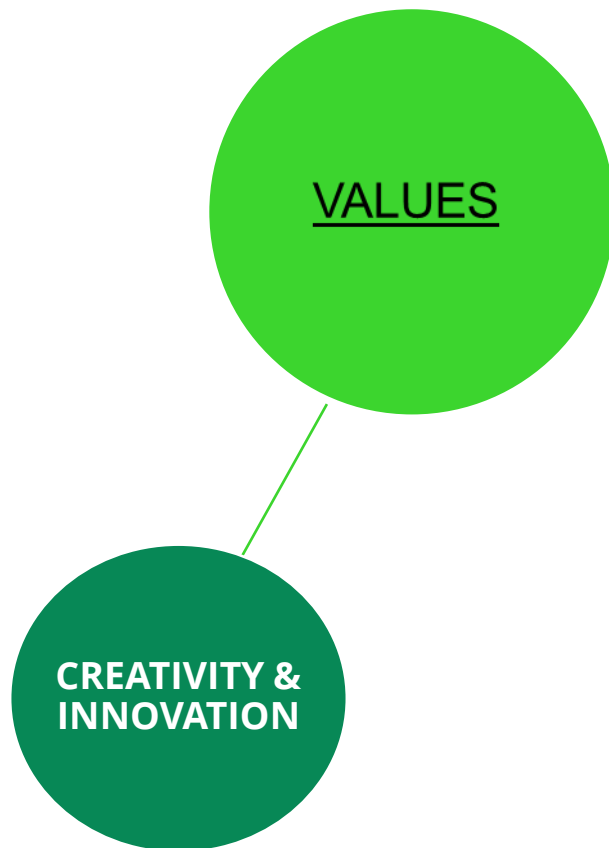
- We empower our people to reach their full potential.
- We cultivate a diverse and inclusive culture of disciplined analysis and action.
- We believe that diversity is the only path to superior performance.

ONE BRIDGE - Specialization



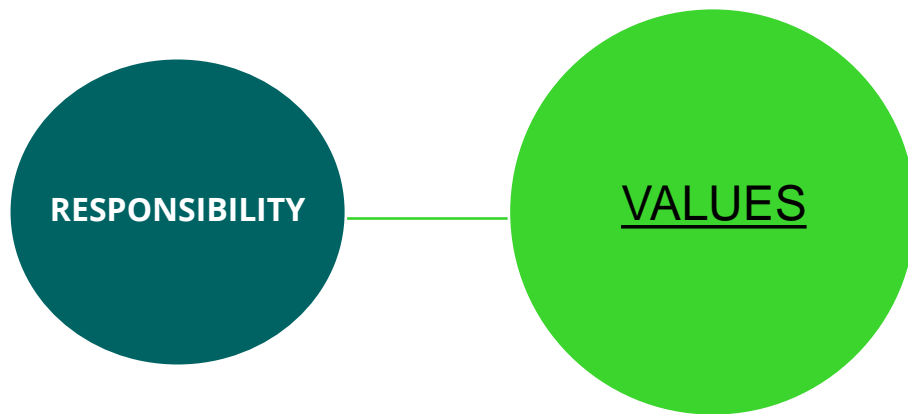
- We develop specialized investment and operating teams which have deep sectoral knowledge of the areas in which we invest.
- We use data, carefully analyzed and fully vetted, to complement decades of experience, in guiding our investment decisions.

ONE BRIDGE - Creativity & Innovation



- We consistently reexamine how we operate and seek innovative solutions to improve our performance, at the asset level, at the Fund level and at the corporate level.
- New ideas are carefully examined and adopted if appropriate.

ONE BRIDGE - Responsibility



- We invest and operate responsibly and believe that strong corporate and individual citizenship go hand-in-hand.
- We understand that responsible investing does not sacrifice returns but should in fact enhance risk and return characteristics through deliberate and thoughtful integration of environmental, social and governance best practices.