

Alpha and Gender Diversity: The Competitive Edge

14–15 September 2016
Boston, Massachusetts, USA

CONFERENCE TAKEAWAYS

Top 10 Conference Takeaways by Barbara Roberts

1. Use the phenomenal language from the conference, “Diversity improves corporate performance and adds alpha to portfolios.”
Refer to Julia Dawson’s [CS Gender 3000: The Reward for Change](#)
2. Remember Anita Woolley’s and Scott Page’s research on building smarter teams through diversity of thought and process. We should be asking why we are at the table and is everyone (on the team) being heard accurately and fairly. “The best teams are diverse teams” –Sallie Krawcheck
Watch [Sallie Krawcheck’s session](#) again.
3. The number of women in the profession will not change unless a person at the top wants it to happen. Meet with your CEO. Bring more men into the conversation and to the conference next year.
4. We all have responsibility to fill the pipeline. Connect with women at your CFA societies and at educational events. Offer your time to mentor and help women in the profession. Destroy the myth of the “Queen Bee.”
5. Networking, mentoring, and compensation are critical. Beware of bias in your organization and help eliminate it.
6. We need to refocus and work on getting more women to the C-suite. We’re making progress on getting women on corporate boards, but don’t forget the C-suite. If you’re in a senior position, “Lean down, yank up!”
7. We need to talk more about culture within investment firms. Ask leaders at your firm, “Is our culture holding women back?” and “Do we have a retention problem because of culture?”
8. Give up the need to be perfect. We are not taking chances unless we meet 100% of the checklist. Use fear to your advantage in the workplace and if you’re post-fear like Lucy Kellaway, use that to your advantage as well.
Watch [Lucy Kellaway’s session](#) again.
9. We need to be deliberate about our actions after the conference. Set goals to achieve before next year’s gathering. Tell at least 5 people about the conference and what we learned.
10. We raise the boys! (and the Martin Lukes’)