Today’s Speakers

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QUESTIONS?
Please type your question in the Q&A section of the toolbar and we will do our best to answer it.
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Agenda
What we’ll cover today

- Overview of talent challenges facing the sector
- Context: Mercer research on performance management and careers
- Career path design areas and examples
- Sample process for developing career paths
- Career pathing as focal point for talent and reward programs
Key Talent Challenges Facing Investment Management in the Financial Services Industry

- Market for talent is highly competitive
- Compensation alone is ineffective
- Skill sets are fully portable
- Not uncommon for full team lift outs or bolt ons
- Top performers have high expectations regarding career advancement
## Context
Mercer research on performance management

<table>
<thead>
<tr>
<th>Area</th>
<th>Critical Drivers of Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Skills</td>
<td>• Elements having most impact&lt;br&gt;  – Having candid dialog&lt;br&gt;  – Linking performance to development planning&lt;br&gt;  – Setting “smart” goals</td>
</tr>
<tr>
<td>Executives Leading by Example</td>
<td>• Holding one-on-one performance discussions&lt;br&gt;  • Having formal performance planning discussions&lt;br&gt;  • Holding team accountable&lt;br&gt;  • Providing regular coaching/feedback&lt;br&gt;  • Regularly talking about performance management as a core business process</td>
</tr>
<tr>
<td>Calibration</td>
<td>• Calibrating all employees</td>
</tr>
<tr>
<td>Technology</td>
<td>• Providing access to information; supporting a comprehensive/timely process</td>
</tr>
</tbody>
</table>

Source: Mercer’s 2013 Global Performance Survey Report (n = 1,056 organizations)
Context
Mercer research on career frameworks

1/3 companies have a career framework

- Plan to implement a new framework (9%)
- Do not plan any modifications (26%)
- Plan to modify their existing career framework, including linking additional talent management or rewards programs (65%)

68% companies plan to implement one

- Plan to implement a career framework
- Do not plan any modifications (32%)

Career Path Design Areas
Program objectives

• Provide employees with a map to own their careers
  – What career opportunities exist?
  – Vertical and lateral progression

• Manage employee expectations
  – What experiences/skills are required for success in the role and to progress?
  – Career opportunities reflect organizational need and employee capabilities
  – Discourage entitlement mentality

• Provide managers with a tool to be effective coaches
Career Architecture
Determining the right career architecture is the blueprint to a strong foundation enabling individual growth and better business performance.

DO I HAVE A CHOICE BETWEEN A TECHNICAL CAREER OR A MANAGEMENT CAREER AT SOME POINT?

HOW MANY RUNGS ARE THERE IN THE CAREER LADDER HERE?

WHERE ELSE CAN I GO IN THIS ORGANIZATION? WHAT OTHER FUNCTIONS EXIST?

WHAT ARE THE ROLE EXPECTATIONS?

WHAT is expected of me?

HOW can I get there?

CAREER STREAMS
Career type within the organization, characterized by unique responsibilities.

CAREER LEVELS
The hierarchical position of a job within a career stream. Recognizes incremental changes in job scope and responsibilities. Consistent across job families.

JOB FAMILIES/SUB-FAMILIES
Generally recognized major professional area, often requiring a unique set of skills. Most career development occurs within a job family.

ROLE
A specific point in a career journey, characterized by a combination of career level, career stream, and sub-family. Each role has a unique blend of competencies and technical capabilities.
Career Path Design Areas
Vertical and lateral progression

FUTURE OPPORTUNITIES

GROUP A

GROUP B

GROUP C

GROUP D

GROUP E

GROUP F

GROUP G

CURRENT ROLE

ROLE PROFILE

ROLE PROFILE

ROLE PROFILE
Career Path Design Areas
Career path design building blocks

Career Path Guides
Career Tracks
Role Architecture
Career Path Design Areas
Dual career track illustration for investment management roles

Individual Contributor

Portfolio Manager (Technical Specialist)
Sr. Portfolio Manager (Technical Expert)

People Manager

Chief Investment Officer
Head of Investment Area
Team Leader (People Manager)

Senior Investment Associate
Investment Associate
Investment Analyst

Investment Management Team
## Career Path Design Areas
Career path guides: content areas for each role

<table>
<thead>
<tr>
<th>Career Path Guides</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Related Information</strong></td>
</tr>
<tr>
<td>Major responsibilities</td>
</tr>
<tr>
<td>Job family specific experiences, e.g., investment management, research, trading, sales</td>
</tr>
<tr>
<td>Broadening experiences</td>
</tr>
<tr>
<td>Typical feeder roles (within and outside the organization)</td>
</tr>
<tr>
<td>Potential next roles (within and outside the organization)</td>
</tr>
<tr>
<td><strong>Career Path Guidance</strong></td>
</tr>
<tr>
<td>Core competencies/skills</td>
</tr>
<tr>
<td>Technical competencies/skills</td>
</tr>
</tbody>
</table>
Career Path Design Areas
Major responsibilities

• 3 to 8 major responsibilities
• Provide a picture of what’s critical
• Not every task or duty
• Show progression from role to role
# Career Path Design Areas

## Major responsibilities: simplified progression illustration

<table>
<thead>
<tr>
<th>Role</th>
<th>Major Responsibilities Illustration</th>
</tr>
</thead>
</table>
| **Senior Investment Associate** | • Independently performs most complex quantitative analyses with limited supervision  
                              | • Prepares reports for internal and external stakeholders  
                              | • Assists in presenting recommendations to Heads of Investment Area and possibly Chief Investment Officer  
                              | • Makes buy, sell and hold recommendations for investments of greater complexity  
                              | • Coaches Investment Associates and Analysts  
                              | • Serves on cross functional team to identify key information for financial reporting |
| **Investment Associate**  | • Under general supervision, performs specialized quantitative analyses, including financial modeling and research, for specialty area  
                              | • Contributes to report development for internal and external stakeholders  
                              | • Makes buy, sell, and hold recommendations  
                              | • Reviews programming developed by Investment Analyst to track data |
| **Investment Analyst**    | • Under close supervision, conducts market research and analysis in support of the selection, evaluation and monitoring of investments or external investment managers for a specialty area  
                              | • Develops programs to track investment and risk management data |
# Career Path Design Areas

## Experiences

<table>
<thead>
<tr>
<th>Types of Experiences</th>
<th>Examples</th>
</tr>
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</table>
| **Investment Management Specific** | • Demonstrated knowledge of assigned asset class and trends/developments in related areas  
• Understanding of basic principles of risk management  
• Ability to interpret investment financial reports and apply data for decision-making |
| **Broadening** | • Project management  
• Financial analysis  
• Statistical analysis  
• Familiarity with sales and trading  
• Experience working outside of home country |
Career Path Design Areas
Career pathways: consider experiences and competencies/skills required

<table>
<thead>
<tr>
<th>Career Pathway Area</th>
<th>Examples</th>
</tr>
</thead>
</table>
| **Feeder Roles:** sources of talent within and outside the organization | • Within: finance and risk/compliance roles  
• Outside: MBA, other asset class specialists, financial services industry, consulting |
| **Next Moves:** within or outside the organization | • Within: most typically vertical, but sales and trading are possible options  
• Outside: financial services, consulting, academia, foundations/endowments |
Career Path Design Areas
Core and technical competencies (may pertain to behaviors or knowledge/skills)

<table>
<thead>
<tr>
<th>COMPETENCY/SKILL TYPE</th>
<th>PROFICIENCY LEVEL (EXAMPLE)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Core</strong></td>
<td>LEARNING</td>
</tr>
<tr>
<td></td>
<td>Demonstrates beginner awareness and understanding</td>
</tr>
<tr>
<td></td>
<td>FULLY PROFICIENT</td>
</tr>
<tr>
<td></td>
<td>Applies intermediate understanding in own work and may guide others</td>
</tr>
<tr>
<td></td>
<td>ADVANCED</td>
</tr>
<tr>
<td></td>
<td>Leverages advanced understanding in own work and may act as a coach</td>
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<tr>
<td></td>
<td>EXPERT</td>
</tr>
<tr>
<td></td>
<td>Leverages expert understanding and acts as a role model, organizational coach and champion</td>
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<tr>
<td><strong>Technical</strong></td>
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</tbody>
</table>

- Applies to all jobs and job families
- Applies to specific job families, e.g., specific to investment management
Competency Model Assumptions

Core Competencies
that apply to all jobs regardless of geography or function

Specific skills and knowledge that are critical for function specific jobs

COMPETENCIES

Relationship and Application

SAMPLE CAREER LEVEL

Level 1
Level 2
Level 3
## Career Path Design Areas
### Competencies

<table>
<thead>
<tr>
<th>Sample Behavioral</th>
<th>Sample Knowledge/Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership</td>
<td>Communications</td>
</tr>
<tr>
<td>Decision making</td>
<td>Quantitative analysis</td>
</tr>
<tr>
<td>Personal influence</td>
<td>Subject matter expertise</td>
</tr>
<tr>
<td>Teamwork/collaboration</td>
<td>Business acumen</td>
</tr>
<tr>
<td>Flexibility</td>
<td>Risk management</td>
</tr>
<tr>
<td>Resilience</td>
<td>Client facing</td>
</tr>
<tr>
<td></td>
<td>Analytical/synthesizing</td>
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</tbody>
</table>
Building Blocks: Competencies
Defined company-wide competencies (leadership, employee) to drive performance management and career development

**Key Career Framework Components**

**WHAT**
Job scope and responsibilities/accountabilities

**HOW**
Key behaviors, skills and knowledge

**EXPERIENCE/PROGRESSION GUIDELINES**
Education and experience guidelines

**Illustrative**

<table>
<thead>
<tr>
<th>Leadership behaviors</th>
<th>Key Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Think Strategically</strong></td>
<td></td>
</tr>
<tr>
<td>Understands the external environment, their customers’ perspectives, and the fundamentals of their business</td>
<td></td>
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<tr>
<td>Actively seeks and synthesizes information to develop broad perspectives and priorities</td>
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<tr>
<td>Looks forward, envisions alternatives, and connects with others to set a direction</td>
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<tr>
<td>Works collaboratively and communicates actively within and across boundaries</td>
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<tr>
<td>Develops a shared understanding of desired outcomes and strategies to achieve them</td>
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<tr>
<td>Develops talent and manages resources effectively and efficiently</td>
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<tr>
<td>Sets clear expectations and holds self and others accountable for results</td>
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<tr>
<td>Anticipates problems, develops contingency plans, and is quick to adapt and act</td>
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<tr>
<td>Encourages open deliberation and consideration of diverse and independent views</td>
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<tr>
<td>Takes initiative, innovates, and challenges the status quo</td>
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<tr>
<td>Inspires and motivates others</td>
<td></td>
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<tr>
<td>Takes well considered risks, shares mistakes openly, and learns from them</td>
<td></td>
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<tr>
<td>Models the Bank’s values and acts with personal integrity</td>
<td></td>
</tr>
<tr>
<td>Creates a respectful and inclusive environment</td>
<td></td>
</tr>
<tr>
<td>Listens empathetically, seeks first to understand them to be understood, and strives for mutual benefit</td>
<td></td>
</tr>
<tr>
<td>Selects and provides feedback and recognizes the contributions of others</td>
<td></td>
</tr>
<tr>
<td>Bank Values and Integrity</td>
<td></td>
</tr>
<tr>
<td>Emotional Intelligence</td>
<td></td>
</tr>
<tr>
<td>Teamwork and Inclusion</td>
<td></td>
</tr>
<tr>
<td>Communication and Influencing Skills</td>
<td></td>
</tr>
<tr>
<td>Develops Talent</td>
<td></td>
</tr>
</tbody>
</table>

**US bank Illustrative 19**
### Personal Influence

**Definition:** Has the ability to convey and communicate ideas in a way that is simple and enhances understanding, collaboration and engagement.

<table>
<thead>
<tr>
<th>Learning</th>
<th>Fully Proficient</th>
<th>Advanced</th>
<th>Expert</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Investment Analyst/Associate</em></td>
<td><em>Sr. Investment Associate/Portfolio Manager/Team Leader</em></td>
<td><em>Senior Portfolio Mgr/Head of Investment Area</em></td>
<td><em>Chief Investment Officer</em></td>
</tr>
</tbody>
</table>

#### Impactful communication

- Exhibits effective oral, written and non-verbal communications and delivers high quality work
- Listens attentively and asks effective questions to clarify understanding
- Understands verbal and non-verbal nuances while delivering messages to create simple and high impact outcomes
- Leverages knowledge of a myriad of communication styles and adapts own approach to convey complex concepts in a simple way to manage sensitive and diverse audiences

#### Internal and external relationships

- Exhibits awareness of different stakeholders (e.g. banks, investment managers, regulatory bodies, etc.) recognizing their impact on XYZ
- Leverages knowledge of different stakeholders and seeks opportunities to engage them in different ways that can have positive outcomes
- Understands priorities and deeper needs of different stakeholder groups while strategically utilizing them for the organization
- Is an expert in managing multiple varied stakeholder perspectives and objectives while providing risk advice with an impact on the wider industry

#### Developing self

- Shows eagerness to learn new business knowledge, technologies, tools or systems and makes a point to offer ideas/solutions
- In times of change, applies various learning experiences to proactively anticipate problems, create efficient solutions and avoids “over-analysis”
- Drives, anticipates and embraces the change process by quickly learning new concepts and techniques and helping others to do so as well
- Keeps abreast of innovative industry practices and external perspectives and shares data/reports that can improve XYZ’s position
### Career Path Design Areas

**Career path guide simplified illustration for Senior Investment Associate**

<table>
<thead>
<tr>
<th>Area</th>
<th>Senior Investment Associate</th>
</tr>
</thead>
</table>
| **Major Responsibilities** | • Independently performs most complex quantitative analyses with limited supervision  
• Prepares reports for internal and external stakeholders  
• Assists in presenting recommendations to Heads of Investment Area and possibly Chief Investment Officer  
• Makes buy, sell and hold recommendations for investments of greater complexity  
• Coaches Investment Associates and Analysts  
• Serves on cross functional team to identify key information for financial reporting |
| **Investment Management Experiences** | • Advanced understanding of assigned asset class and trends/developments in related areas  
• Demonstrated understanding of investment quality standards, including performance in the context of risk management and managing liquidity  
• Advanced understanding of how to apply financial/statistical modeling to investment analyses |
| **Broadening Experiences** | • Project management  
• Demonstrated ability to present recommendations to senior management |
| **Required Core / Technical Competency Level** | • Fully proficient |
| **Feeder Roles** | • Within Investment Management: Investment Associate role  
• Outside organization: MBA, other asset class specialists, financial services industry, consulting |
| **Next Moves** | • Within Investment Management, Portfolio Manager or Team Leader  
• Within organization, sales or trading  
• Outside organization, financial services, consulting, academia, foundations/endowments |
Building Blocks: Role Profiles

A single document for each role that would bring all the pieces together. This would drive market pricing and employee development.

Each job standard profile represents a global level in the career ladder.

- **Job Scope** - Each grade is defined using organization-wide criteria such as scope/impact, complexity, span of control, etc.

- **Responsibilities** - Key areas of responsibilities are developed and assigned by career stream for each grade.

- **Technical capabilities** – Key skills, knowledge and behaviors that are articulated by sub-department for each grade. The types of competences include:
  - **Core (generic)**: across the organization for all employees
  - **Department-specific**: Some specific capabilities can be identified for sub-departments

- Guidelines on key qualifications and experiences are developed and assigned by global job level.
Competency models can include the identification of specific on-the-job actions to strengthen capabilities and facilitate employee development.

**Sample Development Actions**

**Technical Competency: Effective Communication**

<table>
<thead>
<tr>
<th>Element</th>
<th>Learning — Applying</th>
<th>Applying — Leading</th>
<th>Leading — Expert</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical Reasoning</td>
<td>Develop process for establishing goals and assessment by different stakeholders.</td>
<td>Identify key evidence of success-failure messages. Seek input from stakeholders when developing validated models and design an intervention.</td>
<td>Analyze at least one development opportunity and incorporate multiple perspectives, while considering possible scenarios or determining outcomes.</td>
</tr>
<tr>
<td>External Perspective</td>
<td>Identify at least two primary target audiences and study how emerging external channels can be utilized to achieve an appropriate communication.</td>
<td>Enhance awareness by designing a plan to maintain messages effectively. Define strategies and goals that apply to external relationships and objectives.</td>
<td>Language knowledge of different external perspectives to develop communication strategies.</td>
</tr>
<tr>
<td>Writing, Oral, Listening, Presentation</td>
<td>Identify at least two complex issues and study how emerging external channels can be utilized to achieve an appropriate communication.</td>
<td>Enhance awareness by designing a plan to maintain messages effectively. Define strategies and goals that apply to external relationships and objectives.</td>
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</tr>
<tr>
<td>Strategic — Interactive Communication</td>
<td>Select a business objective and use the communication planning process to develop the strategy.</td>
<td>Identify the critical communication platform and design a plan to develop an innovative communication campaign.</td>
<td>Develop an innovative communication campaign to influence and drive brand awareness and increase sales.</td>
</tr>
</tbody>
</table>

**Job Rotations and Changes**

<table>
<thead>
<tr>
<th>Element</th>
<th>Learning — Applying</th>
<th>Applying — Leading</th>
<th>Leading — Expert</th>
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<tr>
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Mercer strongly supports baseline talent review and development through an assessment process. The assessment also helps socialize the competency model.

### Illustrative

<table>
<thead>
<tr>
<th>Sample assessment page with free form comments boxes</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image-url" alt="Sample assessment page" /></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Sample assessment pages</th>
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</thead>
<tbody>
<tr>
<td><img src="image-url" alt="Sample assessment pages" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Developing</th>
<th>Fully Proficient</th>
<th>Role Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receives coaching from executive peers when developing the next generation of marketing skills, analysis, planning, and knowledge requirements that deliver bottom-line results which take more time than colleagues at the Fully Proficient level.</td>
<td>Draws upon a foundation of broad knowledge to develop the next generation of marketing skills, analysis, planning, and knowledge requirements that deliver bottom-line results.</td>
<td>Receives and drives others to develop the next generation of marketing skills, analysis, planning, and knowledge requirements that drive results.</td>
</tr>
<tr>
<td>Develops successful market plans that deliver on revenue projections and profit targets through the direction of senior colleagues/managers.</td>
<td>Develops successful market plans that deliver on revenue projections and profit targets.</td>
<td>Sets and drives market plans that deliver on revenue projections and profit targets.</td>
</tr>
<tr>
<td>Identifies sources of competitive advantage in market and company capabilities and develops market plans that reflect customer and market requirements with the guidance of senior colleagues/manager.</td>
<td>Increases visibility of unique product solutions by translating information into actionable items for others.</td>
<td>Coaches others to competitive advantages of the company capabilities that reflect customer needs.</td>
</tr>
<tr>
<td>Produces positive results using market analysis to make strategic decisions that positively impact the brand most of the time after reviewing a clear example.</td>
<td>Produces positive results using market analysis to make strategic decisions that positively impact the brand.</td>
<td>Drives positive results through others using market analysis to make strategic decisions that positively impact the brand.</td>
</tr>
</tbody>
</table>

Based on where the majority of your ratings fall, choose an overall rating for the Market Analysis and Planning competency:

- Developing
- Fully Proficient
- Role Model

Supporting evidence (support your overall rating with specific work-related examples and results):

**Developing Fully Proficient Role Model**

Mercer strongly supports baseline talent review and development through an assessment process.

**Sample administrator page**

**Sample assessment pages**

- **Section 1**
  - **Step 1:** Choose a rating for the Market Analysis and Planning competency.
  - **Step 2:** Use the rating scale: indicate how frequently you allocate the time or the number of ratings you assign to each option in Step 1.
  - **Step 3:** Choose a rating using market analysis to make strategic decisions that positively impact the brand.
Sample Competency Assessment Results: Individual Report and Talent Heat Map

**Illustrative**

**Individual Report: Overall profile** provides an overview of results

**Talent Heat Map** provides an overview of aggregate results

**Individual Report: Discrepancy profile** shows largest discrepancies between own ratings and the ratings of others
Sample Process for Developing Career Paths

• Gather information on current roles
  – Organization charts
  – Existing position descriptions

• Consider market practice

• Establish design principles around
  – Desired degree of change from current state
  – Career tracks and alignment with organization-wide role architecture

• Involve employees and managers in building content, e.g.,
  – Steering Committee
  – Design Team
  – Broader employees
Key Learnings About Process for Broader Applications

Start career pathing with the right job family
Think carefully about project team structure
Project momentum is critical
And so is executive sponsorship
Career Pathing as Focal Point for Talent and Reward Programs
Today’s Speakers

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