



CAREER PLANNER WORKBOOK

LEARN HOW TO GET YOUR CAREER ON TRACK



INTRODUCTION

If you're reading this workbook, it's probably because you have a desire to succeed in your career. This career planner allows you to take your career into your own hands, and create a plan to help you acquire the skills you need to get to the next level.

You can think of creating a career plan as constructing a plan to acquire new career skills. In Steven Covey's book, *The 7 Habits of Highly Effective People*, habit 7 is called "Sharpening the Saw". Covey uses the example of a Woodcutter who is toiling away sawing for sev-

eral consecutive days. As he does this the Woodsman is becoming less and less productive as he tires with the monotonous job, and during this time the saw's blade becomes increasingly blunt.

So, what's the solution? The solution is to sharpen the saw periodically. Simply taking a break or a holiday isn't enough, for when the saw is picked up again the blade will still be blunt.

Sharpening the saw is an activity that you should set time aside for. In a career sense sharpening the saw means taking the time to acquire the new skills and knowledge you need to get you to where you want to be.

You can think of this career planner as being the first step in this process, helping you to set your course to get to the next level. You should review and update this career plan regularly over time as your goals change and also as your understanding of yourself changes over time.

There are three parts to this planner:

1. Understanding yourself
2. Understanding the bigger picture
3. Setting goals and creating your career plan

Ready? Let's get started...



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UNDERSTANDING YOUR- SELF: SWOT ANALYSIS

SWOT Analysis is a key tool businesses use when performing strategic planning, assisting them in developing their strategy and future direction. From a business perspective, the real advantage of performing a SWOT analysis is that it helps analyze opportunities against the existing strengths and weaknesses of the business.

SWOT analysis can also be performed as a career development exercise to help us better understand ourselves. The advantage of a personal SWOT analysis is that it allows us to see

new opportunities in light of our strengths and weaknesses, so that we can pick the opportunity that is right for us, whilst taking action to limit any potential problems.

The SWOT Matrix

SWOT is an acronym representing Strengths, Weaknesses, Opportunities, and Threats. Strengths and weaknesses are internal characteristics which are personal to you, whereas opportunities and threats are external factors relating to your working environment and industry. You will typically see a SWOT matrix drawn as follows:

| | |
|----------------------|-------------------|
| <u>Strengths</u> | <u>Weaknesses</u> |
| <u>Opportunities</u> | <u>Threats</u> |

To assist you in creating your own personal SWOT assessment, below you'll find some useful questions to ask yourself to help you complete each section of the matrix. When answering these questions try to compare yourself to those people around you such as your colleagues, rather than against people in general. This will make your answers more objective and applicable to your actual career.

Strengths

- What know-how do you have that others don't?
- What are you particularly good at?
- What contacts do you have in your professional network that others don't?
- What would your colleagues say are your strengths?
- What behaviors or beliefs to you exhibit that stand you apart from others?
- Which of your achievements makes you most proud?
- Do you have any qualifications or training that differentiates you?

Weaknesses

- What part of your job do you dislike?
- What are your bad work-related habits? For example, are you often late to meetings or do you forget to take meeting minutes?
- What would your colleagues say are your weaknesses?
- Do you go out of your way to avoid certain aspects of your job?
- What do your colleagues do better than you?
- Are there any gaps in your education or experience?

Opportunities

- What are the trends in your company, your industry, or even the location in which you work? How could you use these trends to your advantage?
- Can you get access to tools or information that can help you in your role, or help you to get to the next role?
- Is your company missing an opportunity that your competitors aren't? Can you make this change happen?
- Is there a problem or gap in the company that you could fill? For example, if there is unclear communication or a bad relationship between your department and the next, can you take it upon yourself to fix it?
- Can you leverage your professional contacts?
- How can you take advantage of what's going on in your company right now? For example, if your company is making an acquisition and you have previously managed an acquisition there is a clear opportunity, or perhaps you speak a second language that might be useful?

This entire section could be summed up as keeping your eyes and ears open to what is going on around you, in your team, in your business, with your competitors, in other businesses, and in your industry, and constantly trying to find opportunities based on these observations.

Threats

- Which colleagues compete with you for the next promotion?
- Could technology render your position obsolete?
- Could trends, such as offshoring, render your position redundant?

- What barriers are preventing you from getting to the next step in your career and can these be overcome?

Now complete the following template using the questions described above to guide your answers.

SWOT WORKSHEET

1. STRENGTHS:

.....
.....

2. WEAKNESSES:

.....
.....

3. OPPORTUNITIES:

.....
.....

5. THREATS:

.....
.....



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THE BIG PICTURE - PEST ANALYSIS

We now have an understanding of our strengths and weaknesses, as well as some of the immediate opportunities that are potentially available to us. Now it's time to look at the bigger picture. We do this using a PEST analysis.

A PEST analysis can help you to select a career in a growing industry. It helps you avoid the myopia that can arise from doing a SWOT analysis alone, allowing you to see the broader opportunities and threats.

The PEST Matrix

PEST is an acronym representing Political, Economic, Social, and Technological. This big picture provides you with valuable context to help with your more detailed planning. To use a PEST analysis you must first identify those factors capable of influencing you. You must then analyze each of these factors for the opportunities or threats they provide.

To assist you in completing your PEST analysis here are some questions to ask yourself:

Political Factors

- Are there any new laws on the horizon that might impact you?
- Could the next election create any new opportunities?
- How might changes in business regulation affect your career?
- What opportunities or threats do these potential political changes represent?

Economic Factors

- What are the typical compensation levels within the industry in which you'd like to work?
- Are compensation levels expected to rise, fall, or remain static?
- What is the long-term demand likely to be for each of these sectors?
- Do the remuneration levels cover your needs and wants?

Social Factors

- What demographic trends will influence this role or industry?
- How will general lifestyle changes influence this role in the future?
- Are educational requirements for these roles expected to change in the future?
- Do you have family commitments that might impact on your ability to pursue these roles and industries?

Technological Factors

- What aspects of the roles you're considering will be replaced by technology in the coming years?
- How will technological trends affect your chosen career?
- What new technologies are emerging that it would be useful to know how to use in order to get ahead of your career competitors?

Now complete the template below using the questions above as a guide:

PEST WORKSHEET

For each factor below consider both the opportunities and the threats from that factor.

1. Political Factors:

.....
.....

2. Economic Factors:

.....
.....

3. Social Factors:

.....
.....

5. Technological Factors:

.....
.....



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CREATING YOUR CAREER PLAN

In this section we're going to use two techniques to set our personal goals and keep our career on track. The first technique we're going to use is to plan like an athlete using outcomes, performance, and process goals.

The second technique we'll use is to plan in thirteen week timeframes. Thirteen weeks is a long enough block of time to allow us to achieve something meaningful, but also short enough that we don't lose our motivation or our focus.

Plan Like an Athlete

The process of goal setting based on outcome, performance and process goals comes from the world of athletics, but is equally applicable to planning our career.

Why Should We Set Goals?

In the 1960's, two psychologists, Edwin Locke and Gary Latham, discovered that goal setting is one of the easiest ways to increase motivation and productivity. Over multiple studies Locke and Latham found that setting goals increase productivity by between 11% and 25%.

Having short and long term goals can have a number of benefits, including:

- Helping us to focus on what is important.
- Providing motivation.
- Giving a real sense of personal satisfaction upon achievement.
- Giving purpose.
- Helping us develop the resilience to persist when the going gets tough.
- Encouraging us to develop strategies and tactics to achieve our goal.

The goal setting process forces us to take stock of where we are now. It is important that goals are set in a way such that we focus on the process and performance rather than the outcome of competition.

There are three types of goals: outcome, performance and process goals. We break goal setting down in this way as it makes it easier to organize our thinking around how we're going to achieve our goals.

Outcome Goals

An outcome goal is the singular goal that you are working towards. Outcome goals are very often binary and involve winning, for example, wanting to win a gold medal or wanting to get a promotion. Whilst outcome goals are hugely motivating, they are not under your control as they are affected by how others perform.

In a sporting sense this might mean that someone outperforms you on the field of play, and in a business sense this could happen if one of your key team members was ill or your competition outsmarted you.

Examples of outcome goals include:

- To win a gold medal at an event.
- To finish top 10 in a local race.
- To become CEO before the age of 40.
- To achieve \$1m in sales in November.

Performance Goals

A performance goal is a performance standard that you are trying to achieve. These are the performance standards you set for yourself to achieve if you are going to build towards your outcome goal.

Over time, performance goals build upon one another to help you achieve your outcome goal. As an example, consider an athlete with the outcome goal of coming top 10 in a local running race. Their first performance goal might be to:

- run 5k in 20 minutes.

Their 2nd performance goal might be to:

- run 5k in 18 minutes.

Their final performance goal might be to:

- run 5k in 16:30.

It is this final performance goal achievement that makes them ready to attempt to hit their outcome goal of coming top 10 in a local race. By stacking performance goals in this manner they can be used to track performance towards your ultimate outcome goal over time. Performance goals are building blocks towards your outcome goal.

Examples of performance goals include:

- Run 10k in 40 minutes.
- Cycle 10 miles in 25 minutes.
- Convert website visitors to newsletter subscribers at a rate of 1%.
- Convert 1 in 3 sales calls to a sale.
- Call 100 prospects this month.

Process Goals

Process goals support performance goals by giving you something to focus on as you work towards your performance goals. Process goals are completely under your control. They are the small things you do each and every day to eventually achieve your performance goals.

Examples of process goals include:

- Train 4 days per week.
- Eat fewer than 1,800 calories per day.
- Ensure every new article on the website has a call to action for newsletter signup.
- Call 5 prospects every day before midday.

By taking consistent action every day on your process goals you will get to where you ultimately want to be, and not burn yourself out in the process.

One of the big advantages of goal setting using outcome, performance and process goals is that it makes it possible to be satisfied with your performance even if the final outcome wasn't what you wanted. This is why you often see post-race interviews with athletes where they say they're happy or proud of what they achieved in the race even though they didn't win or get a medal.

Using SMARTER Goals

Both athletes and business people frequently set goals that make it very difficult to measure progress against, for example, “win a gold medal” or “get promoted”. To avoid this trap make sure that all of your personal goals are SMARTER:

- **Specific:** your goals need to be well defined.
- **Measurable:** it must be obvious when you have reached your goal.
- **Agreed Upon:** stakeholders need to agree the goals through negotiation. This could be your mentor or partner.

- **Realistic:** all parties must believe the goals are achievable.
- **Time-bound:** the goals must have a deadline.
- **Exciting:** the goal must be exciting and give you energy to want to achieve it.
- **Recordable:** progress towards the goal must be recordable, for example, using KPIs.

An Example from Sports

Let's look at a complete example to really make this concept sink in. Suppose you wanted to finish top 10 in a local 5k running race, then your goals might look like this:

GOAL SETTING EXAMPLE: SPORTS

OUTCOME GOAL:

Finish in the top 10 for a 5k race by the end of the year.

PERFORMANCE GOALS:

1. Run 5k in 20 minutes
2. Run 5k in 18 minutes
3. Run 5k in 16.5 minutes

PROCESS GOALS:

Based on Performance Goal #1:

1. Train 4 times per week
2. Eat fewer than 1,800 calories
3. Get a sports massage once per month

Based on Performance Goal #2:

1.
2.
3.

Based on Performance Goal #3:

1.
2.
3.

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In this example the the performance goals are stacked, meaning that you need to run 5k in 20 minutes before you can start to work towards running 5k in 18 minutes. For this reason only one process goal is being worked on at any one time, because we won't commit to our process goals for achieving an 18 minute 5k until we have the first building block in place and are able to run a 20 minute 5k.

An Example from Business

Let's look at a complete example from business to further build our understanding. Suppose our revenue is currently at \$500k per month and we wanted to generate \$1m revenue per month, then our goals might look like this.

GOAL SETTING EXAMPLE: BUSINESS

OUTCOME GOAL:

Generate \$1 million in revenue per month by the end of the year

PERFORMANCE GOALS:

1. Get website visitors to signup to newsletter at a rate of 2%
2. Convert newsletter subscribers to a sale at a rate of 5%
3. Close leads at a rate of 1 in 2

PROCESS GOALS:

Based on Performance Goal #1:

1. Ensure every article on website has a call to action to newsletter signup
2. Ensure there is an exit popup on every page asking users to subscribe
3.

Based on Performance Goal #2:

1. Ensure every newsletter has a call to action for a telephone conversation
2.
3.

Based on Performance Goal #3:

1. Call 5 leads every day before lunchtime, and record and implement what seems to be working.
2.
3.

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Setting Goals in Real Life

In addition to setting SMARTER goals as described above, when setting outcome, performance and process goals, it can be a good idea to break down the timeline of achieving your

outcomes into smaller blocks of time. A 2007 study by psychologist Richard Wiseman showed that 88% of people who make New Year’s resolutions fail. For this reason it is not a good idea to make detailed long range plans focusing a year out or more. Instead stick to a shorter timescale like 13 weeks. There are a number of reasons to use a 13-week timeframe:

- A shorter 13-week timescale will help keep you focused, committed, and excited about achieving your goal.
- 13 weeks fits into a year 4 times, meaning it’s a great way to plan a quarter.
- Your 13-week goal is not so far away that you lose your motivation.
- Not too much will (hopefully) change in 13 weeks so you stand a good chance of hitting your goals which will help you to build and sustain momentum as you head into the next 13 week planning block.

When we combine planning like an athlete and 13-week planning we end up with a planner that looks something like the one below. Use this planner to create your career plan for the next quarter:

GOAL SETTING TEMPLATE

OUTCOME GOAL:
.....

PERFORMANCE GOALS:

1.
2.
3.

PROCESS GOALS:

Based on Performance Goal #1:

1.
2.
3.

Based on Performance Goal #2:

1.
2.
3.

Based on Performance Goal #3:

1.
2.
3.

WEEKLY OBJECTIVES:

| | |
|-----------|--------------------|
| 1 | 1. 2. |
| 2 | 1. 2. |
| 3 | 1. 2. |
| 4 | 1. 2. |
| 5 | 1. 2. |
| 6 | 1. 2. |
| | 1. 2. |
| | 1. 2. |
| 13 | 1. 2. |

As you can see, we've created a mechanism to set career goals 13-weeks out, and then set and track our progress weekly towards those career goals. You should also plan daily what you plan to achieve each day to help you towards your weekly goals.

Over time, as we use this technique to consistently take action towards our goals we build great momentum and give ourselves a great chance to meet our ultimate career objectives.