

Career Planning Worksheet & Check List



Only 8% of people at work ever make a career plan. That is the number one career mistake according to the 60 highly successful and satisfied men and women in a wide variety of careers that I interviewed.

So here is a Career Planning Worksheet & Check List for you to create your plan or plans (dream a little too). You can also download it at www.your7keys.com. The app at Apple and Google Play 7 Keys to Work Satisfaction has related information as well. Use all of these free helps to make a variety of potential career plans. Don't be afraid to do some "what if" thinking. Make at least one plan for the next logical promotion and another for something in a totally different area of the organization that interests you.

Before you move on to planning for a change in your work, take a moment and reflect on why you are thinking about a change. Look at the list below, check those areas that are not working for you.

___ Your daily work is boring or otherwise unpleasant

___ Your relationships with coworkers is an issue

___ Your relationship with your boss/supervisor isn't good

___ Your future potential is limited where you are

___ You need to include plans for a more healthy life style—exercise and more

___ Other: _____

When looking to future opportunities, keep these issues in mind. You don't want to change positions only to find the issues you have today in your current work show up again.

1. What is the title of the position you want to have (assignment change, promotion) next?

2. How soon would you like this change/promotion or new job?

Traditional or Non-traditional Career Path?

Check below whether your next promotion will be in a “traditional” position in a career path based upon your current skill set in your department or division where you are well known or will it be a position in a “nontraditional” career path where you do not have a history of success yet, but believe you have the potential to do well in?

___ traditional career position ___ nontraditional career position

3. Do the decision-makers concerned with this new position know you and your work history?

___ Yes ___ No Do they know you are interested? ___ Yes ___ No

If the answers to either of the questions is **no**, you need to get better connected and noticed (Principle 1 in Chapter 4). Here are things you can do to become better connected and noticed.

___ Find a mentor. The person I will ask to be my mentor is

___ Volunteer for the following task force or committee:

___ Get involved in the following industry organization:

___ Connect with the following peers outside my department:

___ Become a company-sponsored community volunteer in the following activity:

___ Share my career plan with:

___ Boss ___ HR ___ Co-workers ___ Social media

4. Are you a star where you are? (Key 2: Chapter 5)

List three things you need to do to improve your success in your current position.

1. _____

2. _____

3. _____

List some “extras” that you do, or can do, to increase your star power beyond just meeting expectations.

List the name or names of the future “stars” you want to help develop?

1. _____ 2. _____

Trust is one of the most important attributes of “stars.” If you need to improve your “trust factor,” list two things you could do.

1. _____ 2. _____

5. Anyone seeking a promotion should learn more about his or her organization and the business and industry it which it operates.

The more you understand about where the money comes from, what the products and/or services are and who the stakeholders are, the better able you are to make a larger contribution. Check off those tactics you have already used and underline the ones that you intend to use in the future. (**Success Principal 4: Understand the Big Picture, Chapter 8**)

___ Research your company and your industry online.

___ Have a conversation with other leaders in other parts of the organization, to learn what they do and how what you do relates to their success.

___ Learn about your organization's culture.

___ Attend seminars or seek formal education to learn skills important to the overall organization to broaden yourself.

___ Attend industry conferences or meetings.

6. Are you ready for the next level?

Promotion opportunities won't wait for you to get ready. This section can help you plan for what you need to do to be ready for your next promotion opportunity.

What education, training, or experience do you need to become a stronger candidate for the next job you want or promotion?

Education

Training

Experience

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Where and when can you get this added education, training or experience? (Be specific)

Who have you selected as your potential replacement?

(It's hard to move on if you are indispensable in your current job.)

Will you fit in at the next level? Do you look the part? Is your language (grammar and/or English as a second language), terminology, and work style compatible with other the people working at the next level?

Specifically, what do you need to do to demonstrate your readiness for the next level?

____ Wardrobe: Do you need to change what you wear to work?

____ Work Schedule: Do you need to adjust your work habits? How?

____ Personal Issues: Do you need to improve your grammar, speaking style, office organization, posture, hygiene, or increase your level of exercise and healthy mental activities...doing things you enjoy. Anything else that might be helpful in a new, higher-level position? If so, what, specifically?

7. Are you open to real change?

(Key 7: Never Say Never: Get Out of Your Comfort Zone & Capture the Butterfly Moments, Chapter 11) Company policies, procedures, and traditions can only guide employees. The more senior you are, the more you will face crises and challenges where you and your team must determine the best path forward. That will take flexibility and the confidence of having faced tough situations successfully in the past.

List three situations in which you demonstrated flexibility in the last 12 months or could demonstrate flexibility in the next 12 months. (Think job transfer, applying procedures creatively, or taking on a new project)

1. _____

2. _____

3. _____

If you were asked to relocate in order to move your career along, what things, if any, would prevent you from accepting the move?

1. _____

2. _____

3. _____

What concerns would you have if you were offered a promotion into management, where your future success would depend upon team performance, rather than your own personal specialist or technical expertise?

1. _____

2. _____

3. _____

What, if any, relationship problems do you have at work, and what can you do about them?

1. _____

2. _____

3. _____

8. Self-awareness is important at all levels, but it is critical at the highest levels in any organization.

Getting to know your personality traits, along with your thinking, and leadership styles, is part of becoming more self-aware. **(Key 3: Know Yourself & What You Want: Create Your Own Unique Career, Chapter 6)**

What self-awareness tools have you used to understand yourself more deeply?

___ Myers-Briggs or other personality trait assessment

___ C.A.R.E. Profile or other thinking style assessment

___ Worked with a mentor

___ Worked with a career coach or psychologist

What did you learn about yourself, and how might you want to change, in order to make a positive difference in your career?

1. _____

2. _____

3. _____

If you haven't done this type of self-analysis, what are you going to do about it, if anything?

1. _____
2. _____
3. _____

What part of your next job change or promotion will be especially difficult for you? (Consider workload, stress, impact on family, further development requirements.)

1. _____
2. _____
3. _____

What are your motivations for seeking this job change?

1. _____
2. _____
3. _____

Now that you have completed this Career Plan Checklist and considered some of the action steps you identified, use the one-page Career Success Action Plan to make a specific plan to get your next position/assignment/promotion.

The Career Success Action Plan that follows is a quick summary for you of the action steps you have developed in the full plan you have created.

Congratulations, you are already in the top 10% of all employees by creating one or more specific career plans.

Career Success Action Plan

New Position/Promotion sought: _____

Goal date for the change: _____

1. What **Get Connected and Get Noticed** actions do you need to take and when do you need to take them to be a viable candidate?

a. Who do you need to talk to so that the right people know that you are interested and qualified for the position?

When are you going to do this? _____

b. Is there anyone who might try to block your promotion?

Who? _____

What can you do about this, and when? _____

2. What actions do you need to take to make yourself more attractive for the job you want now?

a. What additional skills, knowledge or formal education do you need?

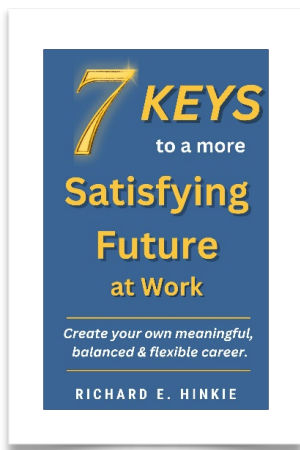
How soon? _____

b. What can you do to improve your “Star” quality?

c. Are there any other actions you need to take? (Think of the other Career Success Keys)

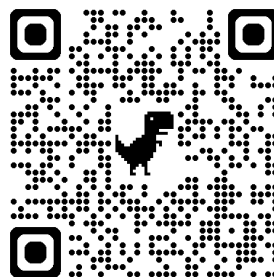
1. _____
2. _____
3. _____

Share your plan with your boss, co-workers you trust, and mentor(s).

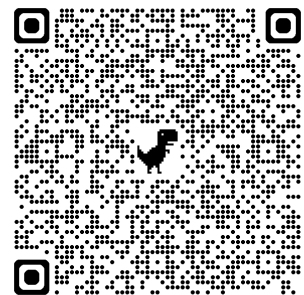


Use www.your7keys.com AND the new 7 Keys to Satisfaction at Work (QR code below) to continue your plan to thrive not just survive at work.

Except for the book, **7 Keys to a More Satisfying Future at Work**, all of these tools are free. The book has much more detail on how and why these keys were developed.



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