KEEPING AN EYE ON YOUR FUTURE

Building Career Plans for You and Your Team
CAROL A. VOLLE, CRM

• 20 years in the field
  • Government (Butler County, Ohio)
  • Corporate (Booz Allen Hamilton)
  • Legal (K&L Gates LLP)

• Presented at ARMA and ILTA

• Live in the middle of nowhere PA – hence this web-x

volleca@outlook.com
412.805.8372
KEEPING AN EYE ON YOUR FUTURE
Building Career Plans for Your and Your Team
IT ALL BEGINS WITH THE FUTURE

and the dreaded...

Where do you want to be in 5 years?
AND A REALLY GOOD PLAN TO GET THERE!

• **Define** your goal
  • Be SPECIFIC (what AND when AND WHY)
• **Assess** what is required for your goal and where you are in relation to it
• **Identify** the proofs and challenges to accomplishing that goal
• **Document** a plan to meet all identified challenges

**BE SMART**

- **Specific**
- **Measurable**
- **Achievable**
- **Realistic**
- **Timed**
GOALS

• Stay in the real word
  • There are things that you can’t do (or probably won’t happen to you)
  • There are things you won’t do
  • There are things that take time

• Samples:
  • I will be a CRM in 3 months.
  • I will become a motivational speaker.
  • I will become a global manager over the next 3 years.
  • I will get my MBA in the next 6 years.
  • I will marry a millionaire, stop working, move to the Rivera, eat bonbons and shop all day.
What **skill set** is required to succeed?
- Now
- At the end of the plan

What **requirements** are usually necessary to do the job?
- Professional Certification
- Advanced Degree

What **responsibilities** are required to do this job?
- 24/7
- Extensive Travel

**How do you get a skills/responsibilities* list?**
- Search professional sites
- Search job boards for position postings
- ASK people already doing the job
**ASSESSMENT - EXAMPLE**

- **Can I demonstrate** these skills?
  - **Skills**
    - **RIM/IG Skills** (write policies, document processes, manage change, technology deployment, etc.)
    - **HR Skills** (create job descriptions, hire/fire, improvement plans, virtual management, etc.)
    - **Finance Skills** (budget development & management, contract negotiations)
  - **Yes**
  - **No**

- **Do I have** the requirements?
  - **Requirements**
    - **CRM**
  - **Yes**
  - **No**

- **Can I live with** the responsibilities?
  - **Skills**
    - **Extended Travel**
  - **Yes**
  - **No**
PROOFS & CHALLENGES

• Review your answers and

  • If the answer is “yes,” document specific examples of when you used the skill, when you received the requirement, your experience with each responsibilities.

  • If the answer is “no,” you need to identify options to change the “no” to a “yes” and any impediments* to making this change.

*There are impediments (challenges) and there are show stoppers….make sure you are honest when building your responses.
<table>
<thead>
<tr>
<th>Financial Management</th>
<th>YES/NO</th>
<th>P/C: Budget built at firm wide level without local input</th>
<th>Review current budget, identify cost reduction strategies and rationalizations, present to management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budget Management</td>
<td>YES</td>
<td>P: Manage a RIM office budget of 490,000 annually including personnel, equipment, storage &amp; services, supplies, etc.</td>
<td></td>
</tr>
<tr>
<td>Contract Negotiation</td>
<td>NO</td>
<td>C: Contracts roll over without my involvement</td>
<td>Review current contracts impacting operation, identify cost reduction possibilities, propose to lead re-negotiation to mgt.</td>
</tr>
</tbody>
</table>
DOCUMENT YOUR PLAN

• Use a format that
  • Makes sense to you
  • Is visible

• Document every time a “no” turns into a “yes”

• Review regularly and review as required
APPLY TO YOUR TEAM

• Ask the question (and **not** at the interview)
• Work with them to define their goals (in relation to your program)
• Help them assess where they are in relation to those goals
• Help them identify the proofs and challenges to accomplish these goals
• Work with them to build a plan that you can support
While this format doesn’t necessarily lend itself to questions, I am available for comment, discussions and questions at

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