

2023

CAREER WORKBOOK #1

**Taking control of your career to
map a path to success and
fulfilment**

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CAREER PLANNING WORKBOOK

Start planning, reflecting and acting on
your career right now



WHAT IS THIS WORKBOOK?

THIS WORKBOOK IS A GUIDE

This workbook is a guide, a reminder, a tool. It is something you can complete in one go, complete a section and think about it or something in between.

It is aimed to help provide a complete or part of a framework that you can take away so you can own career and achieve growth and development in any role you have. You should be able to use this as a base to add the items you learn along the way on your own journey, or add what you learn here, into what you already have!

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INTRODUCTION

Some brief notes introducing the workbook, being open to opportunity, being responsible and proactive

PART **2**

THE PROCESS

An overview of a framework you can use to plan and iterate on based on the vision and action you set out to achieve

PART **3**

REFLECTION, ENVISION, DESIGN & PLAN

A deeper dive into the initial stages to gather information, learn what is possible and allow yourself to create a plan for action

PART **4**

REVIEW, FEEDBACK & ACTION

How to get feedback on your plan and hear from alternative and experienced thoughts and input to allow space to make minor tweaks for greater success. Then how to act upon your plans and stay on course

PART **5**

REFLECTION & CONCLUSION

What to do next and recommendations on taking all or part of the framework forward to continue iterating on your career



CHAPTER

INTRODUCTION

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A NOTE ABOUT PROACTIVITY AND RESPONSIBILITY

The previous page mentioned this is a tool, but it could also be something you grow to hate. What is written in these documents makes no excuses for you, and holds you 100% responsible for the actions you can always take in your career, even when you may feel like there is nothing you can do to push your career forward, there is. You just cannot see the path.

To be successful in your career you might be one of the lucky ones who don't have to put any thought into it at all. If so, that is great. For many of us, that is not the case, and to get to where we want to go, there is a need to be proactive about the actions we take to get what we want, being responsible for those, and not leaving the results of our career to anybody else but ourselves.



ANOTHER NOTE ABOUT BEING OPEN TO OPPORTUNITY

It is very unlikely you will wake up and say to yourself 'I'm ready for the challenging opportunity now'. What you are working hard to be ready for is THE opportunity but also OPPORTUNITIES (many!!). You are working hard so that the opportunity WILL come, and when it does comes around, you will have the clarity to see it as an opportunity and the confidence to say yes.

If it takes 6 months, a year, two years, you are working for opportunities. Opportunity comes from consistency, and often not from hard work for a very short period of time. Hard work over a short period of time can be helpful but it is often difficult to keep up without having negative effects on your life. Opportunities don't come around for people who give up when things get difficult, because you have given up already, so how would they find you?





CHAPTER

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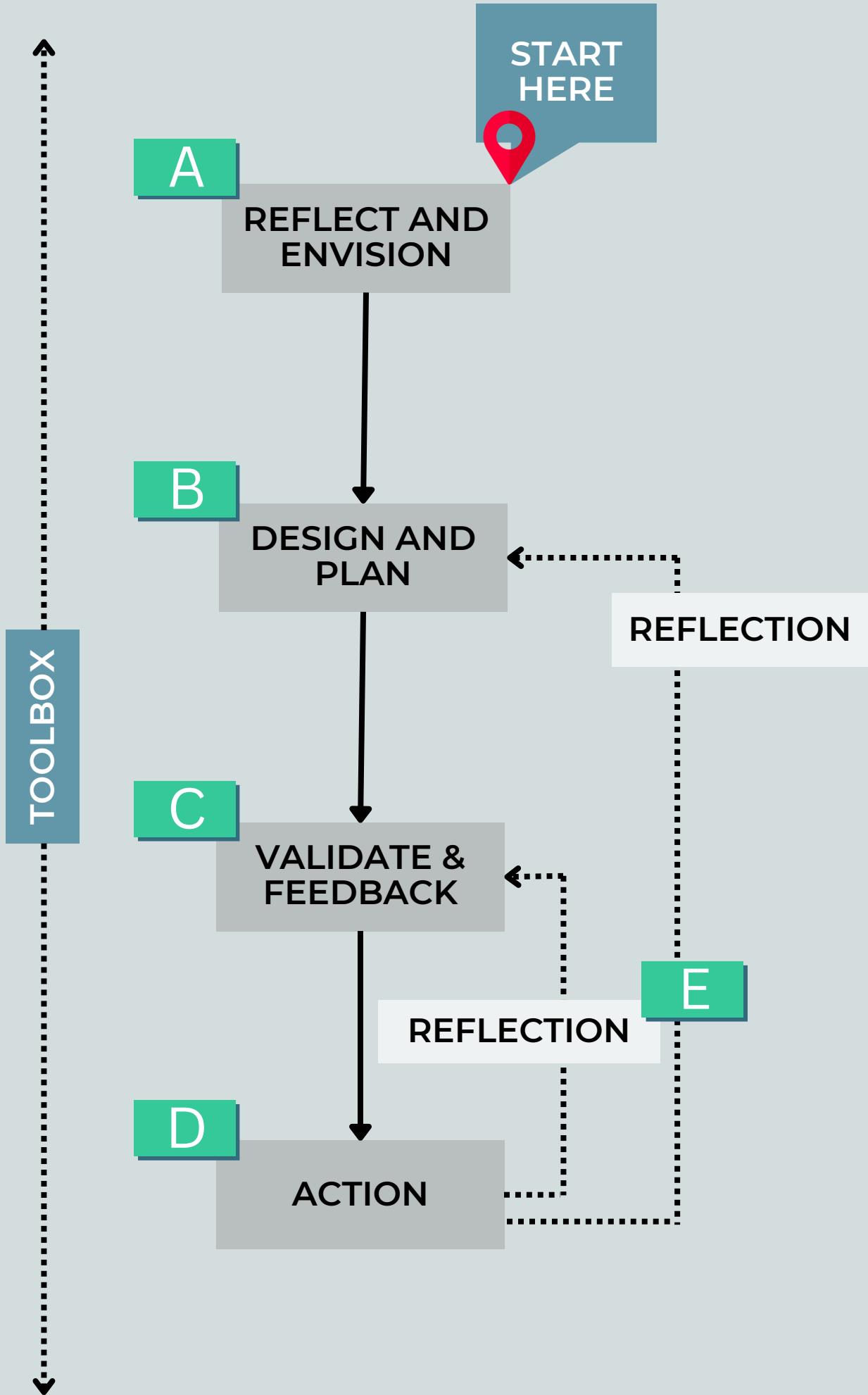
OVERVIEW

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WHERE TO BEGIN

This process doesn't have a name; it is just a basic planning process you could find anywhere in most industries. It is a process I use a lot and have developed with my own learnings, growing to use it naturally to work on my own career, and it could help others like you, too. It is not designed to be complicated or complex. Although there may be some areas, you want to focus on more than others. The entirety of the process is more essential to iterate on than get stuck on one stage for a long time.

Reflection is a critical task in the process, found in multiple areas. One the short-term reflection and another is long-term reflection. These stages are some of the most difficult because they require you to acknowledge you need to grow and to overcome something, you need to change. The key to this is humility, but our other human emotions often get in the way of this. This workbook prompts you to remember to reflect and gives you a short-term and long-term framework to plan against if it works for you, where the degree of planning is really up to your style. You might use some of the tools in this workbook, but you might not. You might create your entire plan, or you may not need to write a single word down. The only correct way is to stick with what works for you, not somebody else. Doing this ensures there are no barriers or easy ways to procrastinate moving forward. This workbook aims to positively influence your career in any way, small or large, to what works for you.



REFLECT AND ENVISION

This is the brainstorm phase and is used to collect stray ideas and dreams together



DESIGN AND PLAN

When you start to organize those dreams and begin to make some kind of journey from it

REVIEW AND FEEDBACK

Get some initial feedback from peers on your plan and start talking about where you want to go in a safe environment



ACTION

Act on your plan, and do so consistently over time



REFLECTION

Get more feedback from your actions and give yourself time to reflect to see if there are learnings you can get and if you achieved what you set out to

A BRIEF NOTE ON THE PROCESS OF REFLECTION

Later in the workbook, the process of reflection is covered in more depth. However, it is essential to know that reflection can be twofold after action. Reflection can occur in both the short term and the long term, where it is up to you how you work best and what is most appropriate based on the action you have taken so far. If you want to repeat quickly, action with shorter-term reflection followed by action can work well, yet sometimes longer-term reflection can provide clarity and space for growth. Often a combination of the two provides the best of both

BASIC FRAMEWORK

WORKSHEETS

There are several worksheets and exercises throughout this document that act like prompts. Some of these are basic, and you may have even completed these before - they are great exercises to keep returning to reaffirm and review where you are today. This career workbook is not an exhaustive list or management tool. Instead, it aims to help give you a place to begin if you have not already and a basic framework for you to start creating some control over your career.

Reflection and Envision

- **Current Role Assessment** - Use this to review the responsibilities and tasks in your current role to see which parts you enjoy
- **Job Description Research** - Take a step back and look at keywords in job descriptions and even your current role on paper

Design and Plan

- **Planning Prompts** - Use these prompts to begin thinking about key areas after your research in the previous stage

Review & Feedback

- **Feedback Checklist** - Suggestions to work through and ensure you have refined your plan enough to 'present' it to your sponsors

Action

- **Think, Plan, Do Tracker** - To a tool to guide you in consistently showing up without overwhelm and using simple qualification criteria to move from one stage to another, ensuring you never working on more than 5 items

Reflection

- **Reflection Checklist** - Prompts for you to work through
- **Common Storyline Plot** - In combination with prompts, a tool to guide you through being comfortable with growth



CHAPTER

3

REFLECTION AND ENVISION

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REFLECT AND ENVISION

This first section aims to allow you to reflect on and consider your career, including your current role. What do you like about it? What don't you like about it? These things can change over time in your position, and you may change too, so what may have been excellent when you first took the role may be different from how you feel about it now. Don't hold back in this section; you may even need a good chunk of time to review your career and your past challenges; what went well for you and what didn't? Depending on where you are in your career, especially early, you may have few experiences. That is okay as well. Dig deeper into your experiences so far, and you can even use past experiences in any education you may have too. What you are aiming to achieve by reflecting is to create a foothold for yourself. You can use this foothold to envision what may be next for you.

Envisioning is about leaning into the safety of the foothold you create, where you understand your likes, dislikes, strengths and weaknesses, to then begin to think about what could be possible for you. What excites you? What interests you? Do you want to develop broader knowledge or specialized type knowledge in a smaller area?

The goal of envisioning is to develop an awareness of the direction you wish to move in and, through research, even a tiny idea of what is needed to begin stepping one foot at a time. It is essential to know that you don't have to look far afield here, and growth in your current role and company could be an excellent place to begin if you're looking for what is possible. In addition, you will likely have a collection of notes and material from your work at this stage (or not!)

By the end of this stage you should have at least a core understanding of what you are looking for, what is out in the market where and what you wish to look for

CURRENT ROLE

ASSESSMENT

REVIEW THE THINGS YOU DO IN YOUR CURRENT ROLE, AND ADD THEM TO THE QUADRANTS BELOW. AN ITEM CAN ONLY BE IN ONE QUADRANT



LEARN MORE ABOUT YOUR CURRENT & OTHER JOBS

Take some time to research your current job, similar and lateral jobs.

Understanding your current role is important to take a step back from your understanding and in some way, assumptions you may have made and gain clarity, understanding and feedback through open questions with your line manager and peers

Exploring other roles, in your own company and through typical job searching apps and websites can help bring even more clarity, perspective and even creativity into your current role, expanding your current knowledge and understanding about how you can grow and gain new skills.

MANAGER 1:1

Explore gaining an improved understanding and perspective on your role by asking open questions such as 'is there anything I could be doing differently?' and reviewing your own job specification and asking how some open ended tasks could be completed. This could be continued discussion over a number of weeks to be able to give space for listening and discussion

PEER REVIEW AND PERSPECTIVES

It can be very useful to listen and hear from your peers in the same or similar roles to see how they do things differently to you - remaining open and not putting yourself in the situation and seeing how the results differ.



REVIEWING THE JOB MARKET

In your career it is helpful to understand what is happening in the current market in your industry. This can be a simple job search or review and for some, an interview to keep those skills sharp. Whilst the depth you go in this search is personal to you, understanding job descriptions for yours, lateral or completely different jobs can be helpful so you can see where your skills fit, help you not feel 'stuck' and identify skills which you get excited about developing or growing, even in your current role!

DESIGN & PLAN

Once you have started or continued that journey of reflection and envisioning, you will become more comfortable with regular introspection. Next, the design and plan stage is about taking your work from the previous section, making sense of it, ordering it and interpreting it in whatever way works for you, whether that is a detailed plan, PowerPoint, or even a sticky note. After this stage, you look at how you can share that plan with others and ask for feedback, so you need to share your vision, needs and questions in a way that helps get you further than if you were working on it alone.

This section includes several prompts for you to consider, along with your work from the previous stage, for you to solidify specific actions and create a plan around what direction you want to go and what needs to happen for you to continue moving forward in that area. That could be to practice in more depth a specific skill, learn something completely new or gain broader experience.

The ultimate goal is about creating and being open to opportunity - you need to act to be able to do this. Being open to possibility means you can focus on the planned output you create whilst being open to what may come along as a result of your action but 'outside' of your project.

By the end of this stage you should have a solid plan you are comfortable getting feedback on from sponsors. Your plan can look like anything you are comfortable with and can be as detailed as you want. It can be a presentation deck, a document or even a simple list with dates

PLANNING PROMPTS

Read the following prompts and challenges, think about them over time and write notes across the next pages

What skills do you have, need and want?

What skills would you like to develop this year?

Have you considered both learned and human skills?

What are you really good at and enjoy doing?

Where and what could help you develop those skills you identified?

How will you stay accountable to your plan?

What support and engagement would be helpful to you?

Who are your sponsors?
Consider who could support you and offer you advice and experience beyond your own

How does that support look in reality? Is it 1:1s? What cadence is that and what does an agenda look like?

What would challenge you?

What challenges would you like to have this next year?

What challenges have you experienced in the past year?
Have you reflected on them on what you may have done differently?

Is there anything you have always considered out of your reach?

How will you connect the skills you identify to experiences you may need to develop them?

How can you create resilience and consistency that works for you?

How can you communicate your needs to help yourself?

What actions and timelines could you begin to consider?

CREATE YOUR OWN CAREER

PLANNING AREA



CHAPTER

REVIEW, FEEDBACK & ACTION

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REVIEW AND FEEDBACK

Review and feedback are about sharing your plan, in whatever way that works for you, with others you identify as a supporter, mentors or sponsors of your career. When you create something for other people, there is a level of effort you need to go to to be able to explain it that you would not otherwise do if you keep the plan to yourself.

By reviewing and getting feedback from others on your plans, thoughts, and challenges, you can look at it differently and work to refine it. There may be areas of your plan that are questioned or not understood - pay particular attention to these areas and work on understanding the feedback before you choose to disqualify or qualify it. You are not looking for validation but want to take the time to go through your plan and listen openly to their thoughts and experienced view.

Some of the prompts in the previous stage related to identifying sponsors, mentors or peers you could work with to seek feedback from in your career plans. Support in your career is critical for growth, so you can look at what you do from other people's perspectives and work to understand your influence and impact. In doing so, you can make the best use of your time and move in the direction you have set out for yourself. Potential people to reach out to could be your manager, peers and others you have worked with in your career with whom you would seek their experience or feedback. Consider asking them if they would have the time to listen to some of your plans, and remember that for those you seek their time and feedback, you are considerate and respectful of their time.

REVIEW AND FEEDBACK

When you ask for feedback, which is true with anything, listening is helpful, even if it's not what you want to hear. Still, when planning your career and openly asking for feedback, you choose what you change. Not all feedback can be implemented or actioned. Think about that for a moment; it is next to impossible to act on all feedback - you may get feedback from one person that recommends A and a second person that recommends B - if A and B conflict, what next? Feedback conflict happens regularly and often causes the result of no action at all because we are constantly worried about acting on the wrong feedback. The crucial part of the process is collecting and interpreting the feedback that speaks to your growth, challenges you and supports you, moving you forward in a direction that excites you.

By the end of this stage you should have presented or spoken to somebody else about your career plan and considered some of what they had to say to make meaningful changes

CREATE YOUR

FEEDBACK CHECKLIST

As you are working your way through the previous planning exercises, it is useful to keep in mind some of the recommended tasks below which can help challenge and expand your own perspectives. It is important to get alternative views and experiences on your plans because in your career your opportunities are dependent on others and their view and recommendation of you and your readiness

Identified my sponsors and advocates and mentored and have asked them for their support and what that specifically looks like

Have you shared your challenges with key individuals and considered their feedback?

Identified people who are less supportive and monitor my behaviour around them

Consider who you yourself could mentor in their career (it helps develop listening skills and further perspectives)

Have agendas set up with managers and peers who have agreed to it (even basic agendas) so expectations are clearly communicated

Identify topics which you wish to ask specific sponsors, advocates and mentors about

Have you got an idea of where your goals are and what skills you wish to develop?

Have you identified where you can learn and develop those skills and what actions you need to take to develop them?

Additional notes:

ACTION

Once you have incorporated any feedback you received during the previous stage into your planning, you must move to action and start working on the tasks you have set out to do. The action stage should be sufficient to allow you to be consistent in your efforts. Of course, it is less challenging to do hard things for a shorter period; however, what builds character and what companies look for is those who can weather the harder times and challenges that naturally come over time.

Earlier in this workbook, we addressed the importance of consistency, and the journey is about being ready for and creating opportunity. The biggest challenge is often this consistency, especially if things get tedious and complex or you don't 'get' what you want in an acceptable timeframe. You have to remind yourself that the 'get' is a better version of yourself, not one specific opportunity you set your sights on. Otherwise, you lock yourself out of seeing and being ready for opportunities you have never thought possible.

Try and avoid planning around one specific event happening at all costs in a particular way; this will help manage expectations and guide you to steady consistency. Instead, keep notes on how you are experiencing your plan, as this active reflection is essential to move on to the following stages.

ACTION

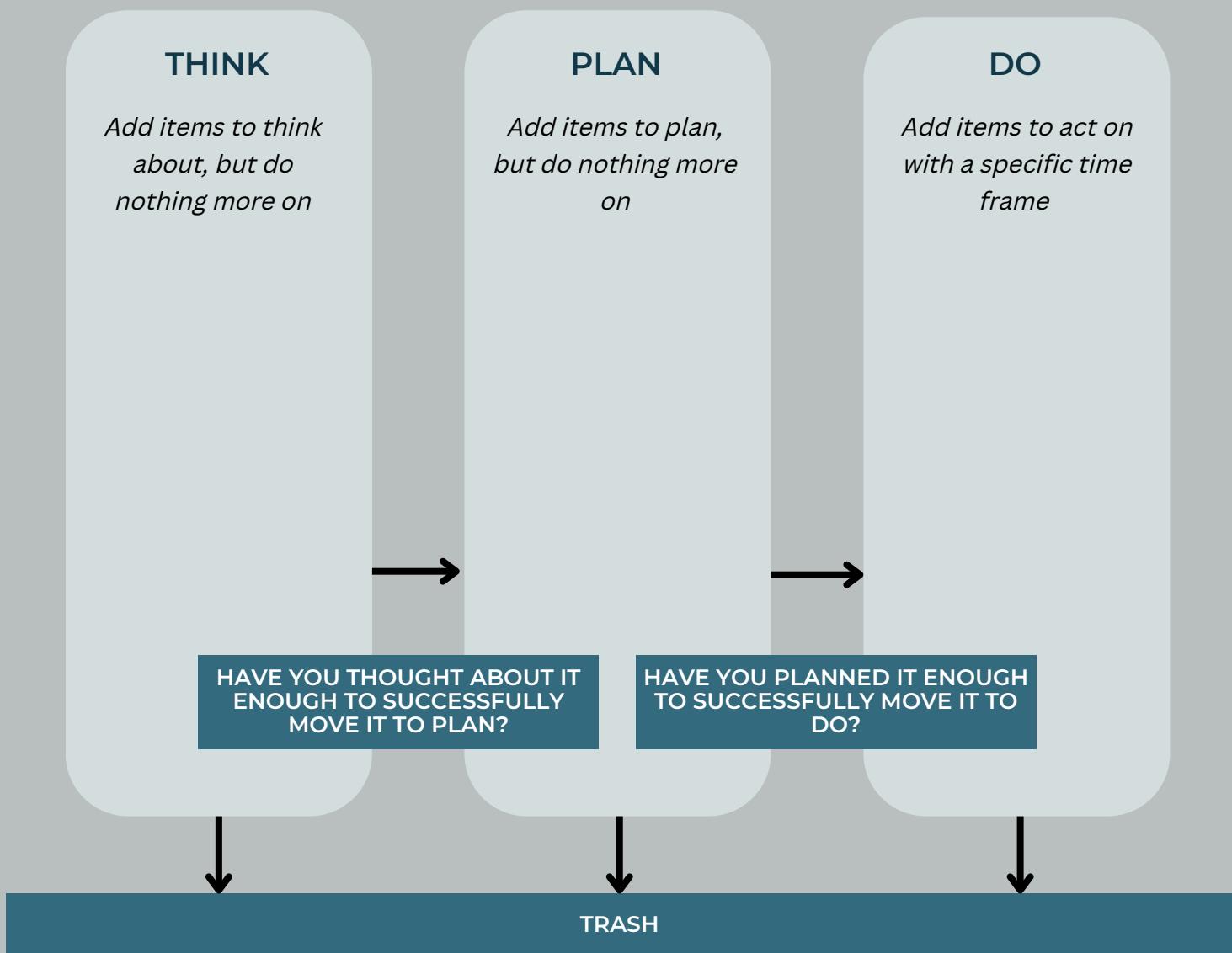
This workbook section includes a framework I also recommended to my team at one point in my career. It is a framework you can use individually and as a group. It is called Think, Plan, Do, and it is straightforward. You only take on five items that you think about, plan or act upon, so you are only working on 15 things at different levels of effort. It also requires a qualification process, so you shouldn't have anything in the 'Plan' and 'Do' sections if they were not in the section before. If you struggle with completing tasks, try out this tool and see if it works for you, modifying it to suit your style.

By the end of this stage you should have completed key tasks you have set out in your plan (or attempted them) and allowed for a period of time that gave you the opportunity to be consistent in your actions

FRAMEWORK

THINK PLAN DO (5X5X5)

This planning tool can help you focus on specific actions for items without being overwhelming. Only 5 items should be in each section, and each section has a specific action in each section before either being graduated to the next section or put in the trash section. Start with 5 things in each section and then ensure you move those completed items to the section to the right. Items in 'Do' should not linger there for long, and if not being completed, moved to the trash to make way for other things from 'Plan'. This way of acting ensures you are only graduating items that have had thoughts and plans around being moved to the 'do' section.



REFLECTION

When you first looked at the workbook, you might have looked at the central process diagram and thought, there is a lot of reflection! There are many books on leadership that will help you improve your ability to reflect, and there is a good reason. If you can become comfortable with reflection, you will identify, without judgement, the areas that you need to improve upon to be open to more opportunities. Not only that, you will be able to improve upon your learned and human skills whilst doing so! The first stage of reflection was at the very start when you picked up this workbook. This type of reflection is more about big-picture planning coupled with imagination.

These second and third periods of reflection come after a period of action. The period of activity is up to you, depending on the challenges you face and if you want to make small or more significant changes. Reflection can help your focus move from action action action to taking a breath and stepping back. It can help you get perspective from yourself and others without having activity in the back of your mind.

REFLECTION

In this workbook, short-term reflection aims at being relatively quick and is more about minor tweaks to your plan. For example, it could result from one activity or a specific challenge. In contrast, long-term reflection is more about taking time out of the action, reviewing your challenges and the results of your effort in more depth. Finally, it takes you further back to the design and plan stage, where you may make changes based on the outcome of the reflection you have done.

You can achieve reflection in many ways, and one of the best ways is by thinking over the period of action and considering typical questions like what went well, what didn't and what you could have done differently.

You can easily get frustrated when something needs to be done; however, you cannot get your desired results for some reason. Perhaps someone didn't agree with you, the outcome of something could be better, or your results may fall short of expectations in your team. So what can you do about it? The first step is to decouple yourself briefly and look at the **common storyline plot** outlined below. This plot is familiar; the story's main character cannot overcome something in their current state. They need to identify that they cannot overcome it to figure out what needs to change to become strong enough to overcome the original challenge. This process is valid for challenges in your career.

You must ensure you give yourself time for reflection to move through these processes of realization and identify what you can do differently to get different (and ideally, the desired) results from your challenge.

This stage is about inward thinking and you can only really know when you have completed this stage and ready to move back into action

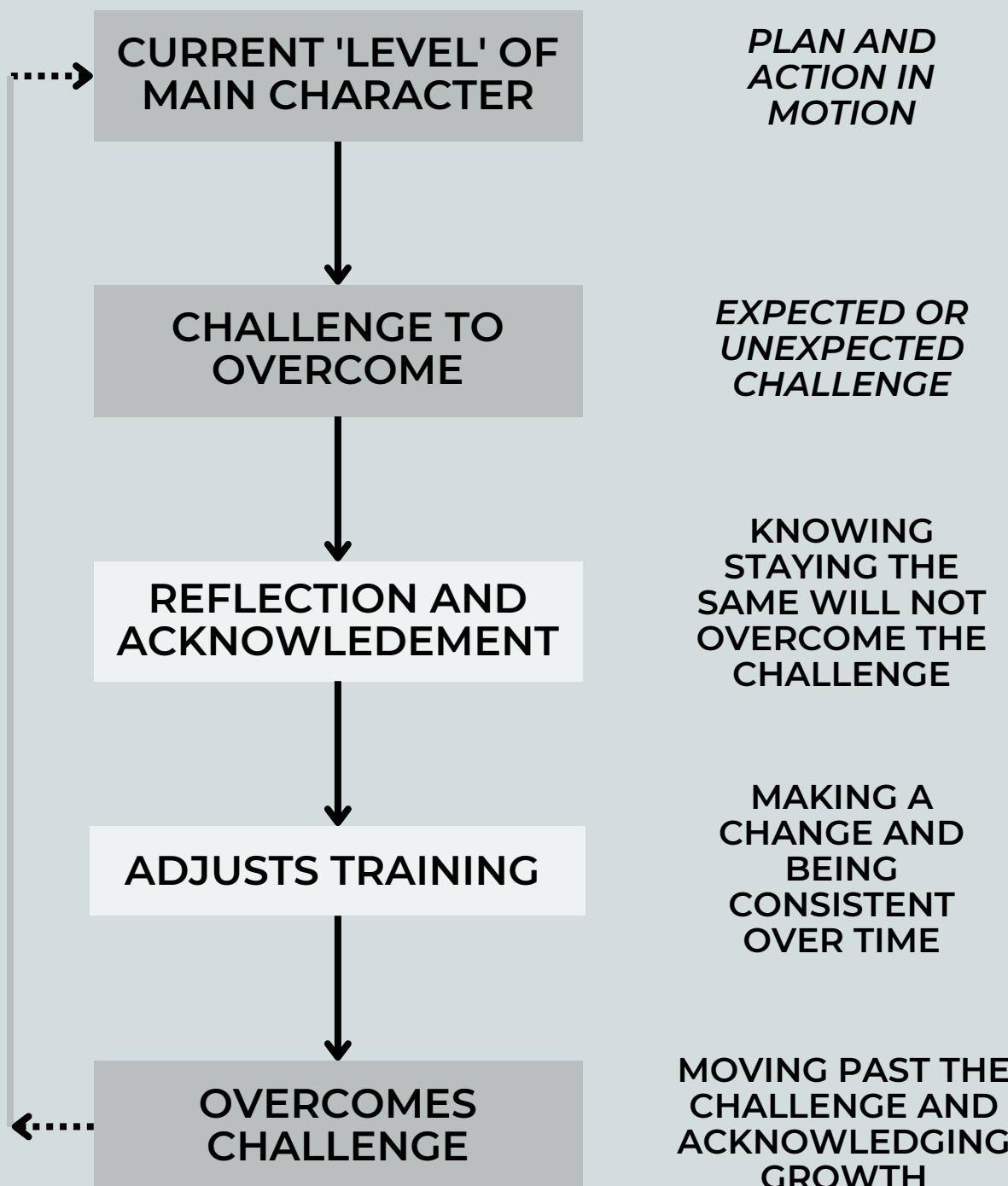
CHECKLIST

When reflecting, review the prompts below to begin thinking about how your experiences so far have been and to look at how you can begin the iteration process

- Have you sufficiently and consistently been working through action?
- Consider if you wish to reflect on the short term, iterate and get back to acting or look at more longer term reflection and replanning
- Have you come across challenges which have either been recognized or recognized now in retrospective?
(Acknowledgement)
- How might you do things differently in those challenges that would produce different, and more desirable results?
- Regardless if you are working on shorter term or longer term reflection, work on adjusting your plan, review and seek feedback
- Now begin your work, either developing your tools or using new ones to keep iterating on your planned action. Ensure you take into consideration as you grow, and gain experience in new things you might want to try different methods of career planning and development, so feel free to adapt these exercises and process to suit you!

COMMON STORYLINE PLOT

To chart a course for growth, using the common storyline plot outlined below can help you focus less on distractions and more on what is within your realm of control to overcome challenges and grow.





CHAPTER

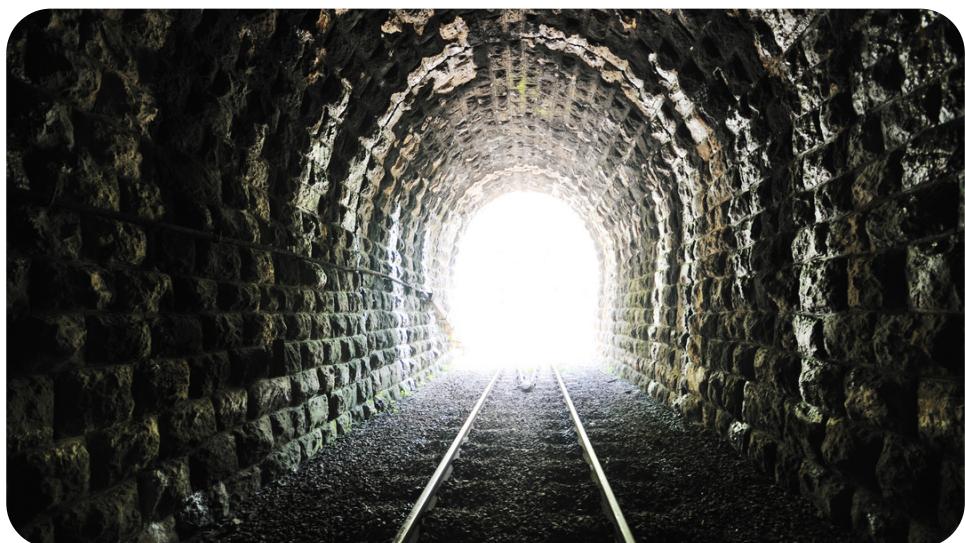
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CONCLUSION

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CONCLUSION

As you continue to work through the stages outlined in this workbook, I hope it has helped provide you with a simple guided process that you can use as is or make your own by adding your tools and recommendations and learnings that you have found along the way. Working on your career, overcoming challenges, and the uncomfortable feeling of change should give way to growth through managing those challenges. By thinking about where you are in your career and where you want to go, you can create and seek out opportunities to help get yourself there and enjoy the journey by creating a support network of tools and processes to guide you.



THANK YOU!

I appreciate your support in downloading this workbook. The goal was to create a workbook that gives people new to their career or those wanting guidance a place to go.

By providing a basic framework that encouraged accountability and openness, I helped promote growth whilst keeping minds open to not just what they know today to be possible. Thank you so much for using it, and look out for updates in the future!

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