

# Career plan for calendar years 2021 to 2023

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- Learn data stack technologies, especially R, Python, SQL, Excel, Power BI, and Tableau for data analysis.

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# Overview



This Career Plan covers calendar years 2021 until 2023. The Plan sets career objectives and goals for these covered years. The objectives and goals set in this Plan shall serve as the targets at work.

The Plan begins with a summary of the current state and aspired future state in career development. It then sets objectives and goals from five dimensions: performance, networking, knowledge and skills, financials and promotion. All these objectives and goals follow the SMART model and should be achieved by the end of 2023 and no later than June 2024.

Companion with this Career Plan is the Learning Plan for Calendar Years 2021 to 2023. Together, these documents will deliver and sustain the growth needed to achieve the financial and non-financial goals in professional development.

At the end of each covered years, I must compose a report to review the performance over the year against the objectives and goals set in this Career Plan.

# Current state



After graduation last year, I joined HSBC's Digital Business Services as a Global Operations Graduate Trainee in July 2021. This rotational, international programme is designed to train graduates into the next generation of operations managers. As of May 2022, I've completed my first rotation on the programme, responsible for a range of process enhancement and automation projects. I'm currently working as a Business Analyst, analysing and restrieving insights from operational data such as overtime, desk utilization, and device utilization.

In May 2022, I secured an offer from P&G as an Information Technology Manager. If I join P&G, I will become an Application Manager for P&G's supply chains, designing software and systems and managing product lifecycles. The P&G job will pay higher than the HSBC programme but will require stronger commitment with less flexibility in terms of schedule. I have unofficially accepted the P&G offer, which means after more than 10 months and less than one year working at HSBC, I will be leaving the organization and entering the fast moving consumer goods industry.

# Future state

I have always hoped to become an entrepreneur. I want to start my own business, build a global brand, and be my own boss. Before that, I need experience, knowledge, and skills to succeed as a businessman. Whist I have acquired financial management and information technology knowledge and skills from college, I need to learn continuously to stay at the forefront of business and technology research. I also need to acquire leadership, marketing, and product management experience, knowledge and skills by working at reputable multi-national organizations.

The experience I got from HSBC has taught me how to methodically manage processes and workforce with analytics and technology. I also got experience leading a team in delivering automation solutions. Now, I need experience that would give me a chance to manage a product from the ground up and deliver that product to create value for society. I also need experience conducting research on products, consumers, and markets to understand how to introduce products into the market and make strategic decisions based on feedback.



“ Develop and apply business acumen and technical expertise to create value for consumers and society. ”

*Career goal in a sentence.*

# Performance

What does it mean to “be the best performer on the team”? The objectives set for this goal explain it all.

## **Objective 1.1 Deliver quality work on time with excellent communication.**

Be the best performer means delivering quality outcome on time. People prefer having their requests fulfilled as good as possible and as quickly as possible. Providing quality and timely services shows how much attention and care you have given to your customers.

Communication is the key in this process. Understanding the challenge well and ensuring that everyone's on the same page are crucial for making meaningful progress.

## **Objective 1.2 Exceed expectations**

Be the best performer means exceeding expectations. When you go the extra mile and strive to exceed expectations, people would appreciate your dedication and are more willing to give you bigger assignments for you to challenge yourself and create value. Your confidence will also get boosted because of the recognition you receive from others. More and better opportunities will be unlocked when you outcompete your peers.

## **Objective 1.3 Think out of the box and use the optimal solution to challenges**

Be the best performer means thinking creatively and offering the best solution to challenges. If there is a better solution to approach a piece of challenge, adopt this solution.

## **Objective 1.4 Take ownership and responsibility**

Be the best performer means taking ownership and responsibility. Approach work from the standpoint of the owner, from a long-term perspective, and hold yourself to account for the work you're assigned to complete. Understand the value and impact of work and approach it methodically with a SMART action plan. Be responsible for all stakeholders.

## **Objective 1.5 Do what's best for stakeholders**

Be the best performer means doing what's best for the team and stakeholders. Always consider their demands and fully utilize resources to fulfil their expectations.

“Be the  
best  
performer  
on the  
team.”

“Get to know all persons on team.”

**Objective 2.1 Actively participate in team building and company-led activities**

Participation in team-building and companywide activities is the most direct exposure to people on team. By actively participating in these activities, I will be able to meet people, establish connection with them, and start perhaps some lifelong friendships.

**Objective 2.2 Work from office as much as possible and approach colleagues on a daily basis.**

Whether or not work from home is an option, I should always push me to work from office. Working from office will allow me to immerse into a work environment that is formed by colleagues. This environment will give me exposure to different people.

In addition, I must also approach my colleagues and project stakeholders on a daily basis. In doing so, I will be able to understand them better and give them opportunities to get to know me.

# Networking

**Objective 2.3 Be the colleague who everyone else want to work with.**

This is one of the best words of wisdom I have ever heard. It is from John Flint, the current CEO of the UK Infrastructure Bank and former Group Chief Executive of HSBC Holdings plc. It is true because EQ is a lot more important in complex work environments compared to school classrooms.

I should strive to be the most respected and wanted workmate in office whether through upholding the highest standards of performance or building long-lasting relationships with colleagues.

**Objective 2.4 Use social media such as WeChat and LinkedIn to maintain connections with colleagues and friends.**

I should use social media to keep my colleagues, stakeholders, and friends posted. This is one of the best and easiest solutions to keep connected with people offwork.



# Knowledge and skills

I need both people and technical skills to excel in careers.

**Objective 3.1 Take the lead in projects. Never wait for others to approach.**

I must take the leading role in projects. This means adopting owner's mindset and proactively approaching work. This also means never wait for others to push for progress.

I should develop a plan for each project to identify challenges, gather resources, and approach stakeholders and keep all members posted on progress. I should be open-minded and always ready to learn from others. I should also be brave to share ideas and engage in meaningful and respectful conversations to achieve shared goals and objectives.

**Objective 3.2 Learn mathematics and statistics to revamp STEM knowledge.**

I need strong maths and stats knowledge to succeed in business. My goal is becoming a business analyst, I must keep this goal in mind and methodically acquire this knowledge early on by reading books, attending lectures, doing exercises, and getting certification. I must do so following SMART action plans to ensure that when opportunities reveal themselves, I'm ready to take on the challenges.

**Objective 3.3 Learn data stack technologies, especially R, Python, SQL, Excel, Power BI, and Tableau for data analysis.**

These are some of the most popular computing tools in the business intelligence (BI) arena. I must learn to use these tools to tackle challenges, create commercial value, and prove to the company that I'm qualified for BI roles.

**Objective 3.4 Learn financial management, business administration, and marketing fundamentals.**

I must consider myself a business professional rather than a tech nerd or just another worker. I must adopt ownership and gain the full picture. I must understand the financial performance and other aspects of the business and I need to acquire marketing knowledge to succeed as a business analyst. In doing so, I can derive better solutions by fulfilling the business's purpose.

**Objective 3.5 Learn to manage product lifecycle and Java Spring Cloud enterprise application development.**

As an Application Manager, I will be responsible for managing product lifecycle - products built with Java Spring Cloud. It's critical that I get familiar with knowledge and skills relevant to my day-to-day duties.

“Leadership, analytics, technology, and product management.”

“Accumulate  
500,000  
RMB by end  
of 2023.”

**Objective 4.1 Robust financial management of income and costs.**

I need to vigorously manage my financials to ensure that income is growing and costs are under control. I must do so by reviewing finance fundamentals, take wealth management courses, and develop tools such as financial statement models to visualize and monitor financial condition.

I must accumulate at least 500 thousand Renminbi in net asset with all legal means by 2023. The tools should set this number as the target.

**Objective 4.2 Learn to use financial instrument to create wealth.**

I should also get to know various ways to secure and generate wealth from savings using financial instruments such as wealth management products and the capital market.

I must take control of my financials rather than relying on family or others for financial management. It is critical to gain understanding of economics and finance early on so that I can secure a prosperous future and achieve my goals.

# Financials

**Objective 4.3 Seize opportunities for pay raise and promotion.**

I must communicate with HR, the Line Manager as well as colleagues to get a thorough, unmistakable understanding of how payroll management works at the company I serve. I must seize opportunities to negotiate salary increase as well as opportunities for promotion or transition into roles that are paid more. I must fully utilize resources available, including knowledgeable co-workers and company intranet to achieve this objective.

**Objective 4.4 Seize side-project opportunities to generate extra income.**

I must continue to develop hobbies, sharpen my web development skills, and acquire new knowledge and skills and seize opportunities to commercialize these assets to generate additional income. I must do so without compromising work quality and to build long-lasting partnerships with co-workers and clients. I should leverage my network and the internet to identify opportunities, think creatively with business acumen, and act decisively with faith.

# Promotion

In order to move from supply chain to business intelligence, I need to establish good relationships with colleagues here and there across all ranks.

## **Objective 5.1 Establish and maintain good relationships with IT and BRM colleagues in BI.**

I must fully utilize my network and other resources available to establish and maintain connection with colleagues from IT and BRM who work in BI. This is critical as I may need their nomination to transition successfully and collaborate with them on important work after joining the BI team.

## **Objective 5.2 Be a good performer on the current position and maintain good relationship with the Line Manager.**

I need to be a good performer on the current team to demonstrate my work ethics and capabilities as a business analyst. I must make my intention of transitioning in to BI clear to my Line Manager without making him concerned about my work on the current role before transitioning. It is critical that I do a good job on the current post and maintain a good relationship with the Line Manager to get his approval and support for the transition to happen.

## **Objective 5.3 Acquire business analytics knowledge and skills, including mathematics, statistics, and computing since day one.**

I must communicate with BI team members to get familiar with the techniques, knowledge, skills, and tools needed to succeed as a Business Intelligence Analyst. I must do extra work to get familiar with these items, ensuring that I'm well equipped with the knowledge and skills required and qualified for getting the BI job when transition happens.

I must join trainings with others and take courses on BI to get prepared for assessments and interviews for the internal role transition.

## **Objective 5.4 Look out for vacancies in BI. Establish and maintain good relationship with BI team manager.**

I must leverage my network and the company intranet to get to know vacancies when they become available. I must stay alerted that competition is everywhere, and whenever appropriate, I should get to know these vacancies directly from people in BI.

I should decisively apply for jobs when I'm qualified to do so before the end of 2023.

“Transition into business analytics in 2 years.”

# Conclusion

In this document, I reviewed the current state in my career and presented the future state to which I aspire. I also set qualitative and quantitative goals and objectives from five dimensions - performance, networking, knowledge and skills, financials, and promotion - in accordance to my career goal. These goals will get me closer to my end goal over time.

In the companion Learning Plan for Calendar Years 2021 to 2023, I have identified research questions and steps to be taken to achieve these goals and objectives. The Learning Plan offers greater detail on each of the topics discussed in this Career Plan. These documents are intended to work together to help achieve professional development goals.



# Career plan for calendar years 2021 to 2023

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