



Learning plan for calendar years 2021 to 2023

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Overview

Career goal in a sentence

Performance

- Deliver quality work on time with excellent communication
- Exceed expectations
- Think out of the box and use the optimal solution to challenges
- Take ownership and responsibility
- Do what is best for the team and other stakeholders.

Networking

- Actively participate in team building activities and company-led activities

- Work from office as much as possible and approach colleagues on a daily basis.
- Be the colleague who everyone else want to work with
- Use social media such as WeChat and LinkedIn to maintain connections with colleagues and friends.

Knowledge and skills

- Take the lead in projects. Never wait for others to approach.
- Learn mathematics and statistics to revamp STEM knowledge.
- Learn data stack technologies, especially R, Python, SQL, Excel, Power BI, and Tableau for data analysis.

- Learn financial management, business administration, and marketing fundamentals.
- Learn to manage product lifecycle and Java Spring Cloud enterprise application development.

Financials

- Robust financial management of income and costs.
- Learn to use financial instrument to create wealth.
- Seize opportunities for pay raise and promotion.
- Seize side-project opportunities to generate extra income.

Promotion

- Establish and maintain good relationships with IT and BRM colleagues in BI.
- Be a good performer on the current position and maintain good relationship with the Line Manager.
- Acquire business analytics knowledge and skills, including mathematics, statistics, and computing since day one.
- Look out for vacancies in BI. Establish and maintain good relationship with BI team manager.

Conclusion

Overview

This learning plan is companion with the career plan covering 2021 to 2023. This document identifies research questions relevant to each objective and goal in the career plan and analyse in detail how to answer each of these questions. The purpose of the learning plan is to help facilitate the execution of the career plan.

For each objective listed in the career plan, there is a section in this learning plan that provides further detail on the objective, including relevant research questions and steps to be taken. These materials will clarify the objectives and clear paths to achieve them.

The learning plan shall be used in tandem with the career plan. These documents are updated constantly to reflect changing demands.



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

Career goal in a sentence.

Performance

Q: What does it take to be a good performer?

There are multiple dimensions in the measurement of performance. A good performer should be a good communicator, thinker, and executor.

He/she should communicate effectively to understand challenges and share ideas without ambiguity. He/she should think out of the box, finding and deploying the optimal solution. He/she should be an excellent action owner who transforms blue prints into decisive, meaningful and careful action.

Q: How is work quality measured?

Quality outputs are error-free, delivered on time and exceed expectations. It should also be purpose-focused and audience-oriented.

In an analysis task, a quality analysis should thoroughly and accurately examines all relevant variables, achieving the goal of the analysis. And the analysis should be presented in an audience-oriented way, on time and exceed their expectations.

Communication plays a big role in the delivery of quality work. When you communicate effectively, conversations will allow you to understand the value of your work and the purpose of that work. And you get a chance to share what's on your mind. Communication also keeps all stakeholders posted on progress, which is critical.

Q: What does it take to exceed expectations?

To do this, we need to understand what the expectations are in the first place. This is achieved, again, through effective, regular, and timely communication.

It is important to note down stakeholders' expectations, qualify and quantify them where appropriate, and develop plans to meet these expectations.

As you work, you should think more creatively from people's perspectives. Find better ways to perform tasks and go beyond what's expected at the minimum.

Q: How to think out of the box?

Thinking out of the box is about problem-solving through breaking conventions. It is about finding fresh and better solutions to old or new issues.

There're often multiple solutions to a challenge, but there should always be a solution that outperforms others. Thinking out of the box is the process of finding, testing, and deploying this solution. Never self-inflict restrictions.

Q: How are ownership and responsibility defined?

Ownership is a mindset. When you do work for your own interests, you're likely working hard and giving special care.

When we work for others, we should also use this type of mindset to think for others and understand how our work may impact them. When we take ownership, we will likely put into more efforts to make perfect the (...)

“Be the
best
performer
on the
team.”

Performance

work and create higher value for the people who we serve. Responsibility is about understanding the importance of our work, including the consequences of failure. We must deliver quality work when people entrust us with the tasks.

Taking responsibility is about holding us to account for the work that we're assigned.

Q: How to do the best things for stakeholders?

We need to communicate with our stakeholders, understand their concerns and share our opinions. We need to put their interests first and strive to meet and exceed their expectations. When we think for them, we will do meaningful things for them.

“Be the
best
performer
on the
team.”

“Get to know all persons on team.”

Q: How to select and participate in team-building and company-sponsored activities?

There is no better way to get to know colleagues than joining team-building and company-wide activities. These activities are designed with the purpose of bringing people closer together whether they're virtual or offline. These activities are usually advertised on the intranet and in work social media groups. There're also activities such as lectures and demos that require less commitment.

I should try to participate in at least three activities each month to get to know people and get people to know me. It's important to maintain a visibility as it will help with promotion and all sorts of career moves.

Q: Why is it crucial to work from office and connect with colleagues daily?

The office is where we work together to achieve shared goals. It is a good place to connect and collaborate. It is critical to connect with colleagues and stakeholders on a daily basis to ensure that people are on the same page and they can see my contribution to the team, the business, and our customers.

They can see who I am from the work I do and how I do this work and the Line Manager will rate me based on the work I do and the conversations that I hold with him.

Networking

Q: How to be the colleague who everyone else want to work with?

This is a good piece of advice from the former Group CEO of HSBC. EQ is arguably more critical than IQ in careers. It is not just about what we are capable of but also about how we market ourselves and how others see us.

Being the colleague who everyone else want to work with will make professional life much easier because we always need to cooperate with others on tasks. There're many ways to become this person. We don't need to be at the centre of the workforce or transform ourselves from introverts to extroverts to achieve this.

There are a lot of reasons why others would want to work with or for you. Perhaps, it is because you deliver quality work. Your outputs are error-free, delivered on time and exceed minimum expectations. Your work is purpose-driven and audience-oriented. It could also because you're willing to offer help when others are in need, or because you're a humerous or resourceful person that possesses certain knowledge, skill or resource that others don't have.

Striving to be the colleague that others would love to work with will help you a great deal in career advancement.

“Get to
know all
persons on
team.”

Networking

Q: How to use social media to connect with people?

Social media is a big part of our digital life. We can connect with people their by sharing content and holding healthy conversations.

We should fully utilize social media to connect with people, whether it is starting a chat, sharing information, or commenting on others' posts. There're many ways we can use social media to network.

We can also join virtual and offline events by inviting others. These events are usually shared on social media. These connections will help us a lot in our professional and personal development.

Knowledge and skills

Q: How to acquire leadership skills?

The most obvious way is to take the lead in projects. When you actively engage your work, your stakeholders, and your customers, you're more exposed to leadership opportunities. Taking the lead in projects is a challenge but also a rewarding experience.

The best way to develop leadership skills is to take the lead with a leader's mindset. Be the first to explore untouched waters and do extra work to find out the best possible solution.

Q: What mathematics and statistics knowledge is required and how to acquire it?

Whether finance or IT, both of which are quantitative fields that involve the use of maths and stats. It is necessary to have a firm grasp of these subjects to excel in these fields.

Since I'm looking to deep dive into technology, I must systematically upskill in terms of mathematics and statistics. I need to understand calculus, algebra, and discrete mathematics as well as statistics fundamentals such as descriptive, predictive and prescriptive analytics to design AI models and business intelligence solutions.

It takes practice to acquire this knowledge. I need to read books, attend lectures, do exercises, and apply this knowledge at work or in side projects to cement knowledge.

Q: What knowledge and skills are needed to transition into business analytics?

In order to successfully transition into business intelligence, I need to acquire mathematics and statistics knowledge.

I also need to master data stack technology for cleaning, analysing and visualizing data. In particular, I need to know Python, R, SQL, Excel, Power BI, and Tableau. These are some of the most used tools in BI. I also need to get to know the business's specific tools in BI.

I need to build and maintain connection with the BI team to get to know the latest about BI.

Q: What business knowledge is required to succeed as a BI analyst?

In addition to data stack, I need to understand the business, the market in which it operates, and the business's customers. To understand these, I need to use all resources available to conduct research offwork and review economics and marketing fundamentals. I also need to understand corporate finance to make wise, strategic decisions.

Q: What are some job-related skills?

On the new post as an Application Developer, I need to learn project management in software engineering, product management, software development lifecycle, and Java Spring Cloud enterprise applications.

“Leadership,
analytics,
technology, and
product
management”

“Accumulate
500,000 by
2023.”

Financials

Q: How to manage income and costs?

First, I need to acquire wealth management knowledge through reading books and attending lectures. Second, I need to build financial models to manage finances.

Both income and costs must be managed robustly, ensuring that costs grow slower than income and income grows at an increasing rate.

It is important to keep finances under control through active monitoring and planning. It would be helpful to create tools to track financial performance.

Q: How to use financial instruments to generate additional income?

There are many financial instruments such as stock, debts, and other services provided by banks.

I need to get ware of these products and services, understanding their risk profiles and make use of these instruments to generate additional income.

Q: How to identify and seize pay raise and promotion opportunities?

Such opportunities are usually shared on the company intranet, spreaded by words or other mediums. The first step in seizing these opportunities should be getting aware of them. Then, the next step should be preparing for opportunities that may suit.

Q: How to identify side project opportunities?

In addition to work, side projects can also bring in incomes. Sometimes, side projects can even develop into standalone businesses.

I must continue to develop hobbies and sharpen my web development skills to prepare and capture side project opportunities.

Side projects shall play a big role in financial management.

Promotion

Q: How to establish connection with BI team people?

I need to seize every opportunity to get to know people in BI, starting from the induction day. Company-led activities usually provide exposure to such networking opportunities.

I should also use social media such as WeChat and LinkedIn to connect with BI people to get to know their work and prepare for vacancies there.

Q: How to be a good performer on the current team and maintain good relationship with the Line Manager?

Being a good performer on the current team is critical to get the Line Manager's approval for role transition. To perform well on the current team, I need to ensure that all work are delivered on time with high quality. I need to possess all the knowledge and skills as discussed in the Performance and Knowledge and Skills sections.

Q: How to acquire business analytics and computing skills?

These have been discussed in the Knowledge and Skills section.

“Transition
into
business
analytics in
2 years.”

Conclusion

In this learning plan, we reviewed each and every goal and objective set in the companion career plan. For each objective, we discussed a few relevant research questions. This information should help executing the career plan.

Now, having created these plans, it's time to act. The next step should be going over all research questions and create tools to implement the steps.

Learning plan for calendar years 2021 to 2023

End of document