



KEEPING AN EYE ON YOUR FUTURE

Building Career Plans for You and Your Team

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- 20 years in the field
 - Government (Butler County, Ohio)
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- Presented at ARMA and ILTA
- Live in the middle of nowhere PA – hence this web-x



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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 world
 - 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.

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Measurable
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ASSESSMENT

- 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	Yes	No
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)		

- Do I **have** the requirements?

Requirements	Yes	No
CRM		

- Can I **live with** the responsibilities?

Skills	Yes	No
Extended Travel		

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.

PROOFS & CHALLENGES - EXAMPLE

Financial Management			
Budget Development	YES/ NO	P/C: Budget built at firm wide level without local input	Review current budget, identify cost reduction strategies and rationalizations, present to management
Budget Management	YES	P: Manage a RIM office budget of 490,000 annually including personnel, equipment, storage & services, supplies, etc.	
Contract Negotiation	NO	C: Contracts roll over without my involvement	Review current contracts impacting operation, identify cost reduction possibilities, propose to lead re-negotiation to mgt.

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



THANK YOU

While this format doesn't necessarily lend itself to questions, I am available for comment, discussions and questions at

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