

CAREER SUCCESS: Navigating the New Work Environment

Third Edition

WORKBOOKS



Developing Self-Awareness

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DATA COLLECTION: ANALYZING PAST EXPERIENCES

A great place to start the process of self-exploration is with an analysis of your life experiences. Analyzing past experiences is an invaluable source of career information and can be used to draw a map for the future. We recommend completing the following exercises in this order:

- Your Life's Story: Past and Future (from *FindingFIT*¹)
- Educational Experiences
- Peak (High) and Trough (Low) Experiences

Completed examples of each exercise for reference are available at the end of this data collection activity.

YOUR LIFE'S STORY—PAST AND FUTURE

This self-assessment exercise has four parts. It should take you about an hour to complete.

¹Portions of *Career Success: Navigating The New Work Environment* are used with permission from *FindingFIT*. *FindingFIT* is a copyrighted publication of the University of Virginia Darden School Foundation. A full version of *FindingFIT* is available for purchase at <http://store.darden.virginia.edu/findingfit>.

STEP 1: MY LIFE'S STORY IN 400 WORDS OR FEWER

Write your life's story in 400 words or fewer. This will require you to condense and to focus on the highlights and major events. Do this now, *before* reading the other steps of the assignment. Remember, 400 words or fewer.

STEP 2: KEY EVENTS TABLE

In the following table, list the *key events* you mentioned in the 400-word story in the left-hand column, one event per row. Then, note the extent (from -5 to $+5$) to which each event was an emotional “down,” neutral (0), or “up”. Next, try to summarize the *key learning* from that event in the third column. What did this event teach you about life and living? What was your “takeaway” from this event?

KEY EVENT	EMOTIONAL IMPACT (-5 to 0 to $+5$)	KEY LEARNING OR INSIGHT

STEP 3: CHARTING YOUR EMOTIONAL IMPACT SCORES

Use the blank graph below to chart chronologically from left to right the key events in your life in terms of their emotional impact. Then, label the peaks and valleys with the events they represent.²



STEP 4: YOUR FUTURE

Write your preferred future professional scenario in 200 words or fewer. Begin with today, and end with your death. Remember, only 200 words.

²Unless you have Adobe Acrobat Pro, consider printing this graph to complete the activity by hand.

STEP 5: INTERPRETING YOUR DATA

Look through your key learnings and insights from Steps 2 and 3. What themes or patterns do you find? Your life's "lessons" in the third column of your Key Events table might be themes in your life. How do they match up with the demands that various jobs place on people? Do you begin to see patterns emerging that match other data sets you may have (e.g., diaries, past performance reviews, etc.)?

-
-
-
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-
-
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-
-
-
-

EDUCATIONAL EXPERIENCES

In the following table, list your favorite and least favorite courses, courses in which you did best and worst, and extracurricular activities you engaged in during your secondary/high school and college/university years. Feel free to add additional categories that are meaningful to you.

	Secondary/High School	College/University
Favorite courses		
Least favorite courses		
Best-grade courses		
Worst-grade courses		
Extracurricular activities		

PEAK (HIGH) AND TROUGH (LOW) EXPERIENCES

For this exercise, describe and discuss past life experiences that made you feel either particularly happy and fulfilled or particularly unhappy and unfulfilled.

- List and describe a total of three to five peak experiences (aim for one or more each across work, family, and personal life categories)
- Explain why each experience felt like a peak experience and what you learned from it
- List and describe a total of three to five trough experiences (aim for one or more each across work, family, and personal life categories)
- Explain why each experience felt like a trough experience and what you learned from it

You are encouraged to provide as much detail as possible.

Peak Experience Description	Why It Felt Like a Peak Experience
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Work Life	
------------------	--

Family Life	
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Peak Experience Description**Why It Felt Like a Peak Experience**

Personal Life

Trough Experience Description**Why It Felt Like a Trough Experience**

Work Life

Family Life

Trough Experience Description

Why It Felt Like a Trough Experience

Personal Life

NEXT STEPS

Congratulations on completing this first set of data collection exercises! Please remember to save your results on each set of exercises you complete; they will be used for the Data Analysis and Career Implications activity.

We encourage you to engage in the [next set of data collection exercises](#), which will address clarifying your values.



DATA COLLECTION: CLARIFYING VALUES

Values represent beliefs, principles, qualities, or standards and generally guide our day-to-day behavior and conduct in life and in work. We derive psychological satisfaction and fulfillment if our occupation, job, and work environment allow us to express the values that we uphold. This is why identifying and understanding your own personal values is a critical step in the self-exploration process. That said, understanding your values can be a complicated endeavor.

Because the list of potential values you may consider desirable can be very long, it is important to create a value structure that clarifies the relative importance of your individual values.

There are a number of exercises and tools at your disposal to identify the values that may have a significant impact on your career goals and decisions. We recommend completing the following exercises in this order:

- Value Identification Exercises 1 and 2
- Value Clarification Exercise
- Value Test Exercise
- ValueBase

Completed examples of each exercise for reference are available at the end of this data collection activity.

VALUE IDENTIFICATION EXERCISE 1

Even though we express values in our day-to-day conduct, some individuals actually have a hard time identifying and verbalizing them. This exercise will help you generate a list of values that are relevant to you.

Over a two-week period, make detailed notes of all the things (behaviors, conduct, or attitudes) about yourself and others around you that make you either happy or unhappy. For instance, if treating others with respect and dignity, whether they are relatives, friends,

subordinates, colleagues, or superiors, is an important value for you, then you may well be bothered by an individual who talks rudely and disrespectfully to others. If you are happy about the fact that your manager gives you a lot of freedom to operate, then working independently is also an important value. If not finding time for your favorite hobby or exercise is a source of extreme frustration for you, then having time for self or staying healthy and fit are significant values for you.

If you conduct this exercise properly, then by the end of the two-week period, you should be able to generate a reliable list of values that are relevant to you. Capture your observations in the table below.

What Makes You Happy or Unhappy?**Value Implication**

What Makes You Happy or Unhappy?

Value Implication

VALUE IDENTIFICATION EXERCISE 2

Another exercise for identifying relevant values is to think about your life goals and your ideal future life. On the one hand, if your ideal life points to the fact that you are living in Manhattan and running a large corporation, then that tells you something about your values and priorities. On the other hand, if your life goals relate to exiting the rat race, teaching at a university, and living in a small town, then that too provides important insights into your values and priorities. Again, if you conduct this exercise truthfully, you should be able to generate a reliable list of values that are relevant to you.

When you fantasize about your ideal life or when you reflect on the future portion of the “[Your Life’s Story](#)” exercise,¹ ask yourself the following questions and capture your thoughts:

Questions to Consider	Your Responses
Which kind of occupation are you involved in?	
Which kind of organization are you working for? Or are you self-employed?	
What job are you performing?	
What are your working hours?	

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Questions to Consider

Your Responses

What does the work environment look like?

What is your commuting time?

Are you married? Do you have children?

Where are you living: a big city or a small town?

What is the size of your home?

What activities are you engaged in with your children? How much time do they take?

What kind of material possessions do you have?

What personal hobbies or activities are you engaged in? How much time do they take?

VALUE CLARIFICATION EXERCISE

Complete the table below using the list of values you generated in the two Value Identification exercises above. Make sure to carefully reflect on your “always valued” values and to have no more than eight values in this category (you may have fewer). Once you are satisfied with the classification of your values, this exercise is complete. You should see a trend in that the “always valued” values you have identified reflect the real you.

	Always Valued	Sometimes Valued	Never Valued
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			

VALUE TEST EXERCISE

The practical application of the previous exercise is that “always valued” values can prove to be extremely helpful in career decision making. An effective way of applying the “always valued” values is to hold or test them against a career decision.

To begin, think about at least one current work decision and one current private life decision with which you are confronted. The work decision could relate to accepting a new job offer, contemplating a career change, setting a specific career goal, and so on. Examples of private life decisions include moving in with your boyfriend/girlfriend, getting married, adopting a baby, coaching your child’s soccer team, and so on.

**Decision
Area**

Decision to be Made

Work Life

Private Life

You will need the “always valued” responses you generated in the Value Clarification Exercise above for this exercise. Using the Work Life and Private Life decision information above, complete the appropriate table below. For each “always valued” value you generated in the Value Clarification Exercise, determine whether the value “supports,” “conflicts with,” or “is not relevant to” the decision being considered. For each “always valued” value that conflicts with the decision, explain how you will resolve the conflict or why you are willing to live with it and for how long.

WORK LIFE VALUE TEST

Always Valued	Supports, Conflicts with, or Is Not Relevant to Value?	For each “always valued” value that conflicts with the decision at hand, explain either how you will resolve the value conflict or why you are willing to live with the value conflict.
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

PRIVATE LIFE VALUE TEST

Always Valued	Supports, Conflicts with, or Is Not Relevant to Value?	For each “always valued” value that conflicts with the decision at hand, explain either how you will resolve the value conflict or why you are willing to live with the value conflict.
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

Finally, write a conclusion for each decision, which summarizes and rationalizes the decision you intend to make.

Decision Area	Decision	Conclusions
----------------------	-----------------	--------------------

Work Life

Private Life

This Value Test Exercise is extremely important for effective career management. You should be fully aware of value conflicts that a given career decision may pose. And you should have a clear understanding of how you will resolve or live with a value conflict. Unintended value conflict situations often result in unhappiness and frustration, which ultimately lead to lack of motivation and potential failure.

ADDITIONAL ASSESSMENTS

In addition to the exercises above, CFA Institute members and CFA® Program candidates may also wish to consider the ValueBase assessment available in the [CFA Institute Career Tools](#) (login required). This assessment forces you to prioritize values specifically related to a workplace environment from a list and then further sort them until you've ranked your top five. The ValueBase assessment looks at values specifically related to a workplace environment. If you choose to complete the ValueBase assessment, you can record your top five values here:

Prioritized Values

1.

2.

3.

4.

5.

In the *FindingFIT*² model, the **Career Concepts assessment** encourages you to more deeply understand your values related to “success.” If you choose to complete this assessment, you can record what you’ve learned about yourself here:

Career Concepts Assessment Learning

NEXT STEPS

Congratulations on completing this second set of data collection exercises! Please remember to save your results on each set of exercises you complete; they will be used for the Data Analysis and Career Implications activity.

We encourage you to engage in the **next set of data collection exercises**, which will address identifying your interests and motivations.

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DATA COLLECTION: IDENTIFYING INTERESTS AND MOTIVATIONS

Interests and motivations refer to activities and tasks an individual likes to perform and considers satisfying. One of the most important determinants of career success is the degree to which individuals enjoy their work. Successful individuals view work as something that interests and motivates them and, in that sense, represents more fun than work. Individuals who choose career fields that are compatible with their interests and motivations find greater satisfaction in work and have longer tenures in their jobs.

Many tools and instruments have been developed to help individuals match their interests and motivations with occupations and jobs. Below are some you may want to explore. Additionally, most universities make tools available for their students (and often alumni as well) to assess the compatibility of occupations and jobs with their interests.

Name	Description	Where to find it
Strong Interest Inventory (SII)	The SII provides a wealth of information, including 6 general occupational themes, 30 basic interest areas, and hundreds of occupations and jobs. The basic interest areas cover a variety of work roles, such as sales, management, teaching, and finance and investing, whereas jobs cover a variety of positions in business, government, military, and so on.	The SII assessment is available (at cost) through CPP. The traditional assessment requires interpretation and consultation with a trained administrator, however, CPP does allow individuals to purchase the iStartStrong report which provides an interpretation of results without an intermediary.
Career Preference	This tool provides you with a powerful process to reflect on your current and past jobs and identify the main themes in a structured approach. The outcomes include clarity about the ideal career direction for you.	Career Preference is available to CFA Institute members and CFA Program candidates at no fee through the CFA Institute Career Tools (login required).

Name	Description	Where to find it
CenterMark	Assess the key attributes and behaviors associated with job performance and satisfaction. This tool provides an in-depth view of 11 key areas associated with job performance for each of the 16 Myers–Briggs types, including characteristics, contributions to the organization, management style, communication style, learning style, problem solving, decision making, conflict resolution, motivators, team participation, change management, and growth opportunities.	CenterMark is available to CFA Institute members and CFA Program candidates at no fee through the CFA Institute Career Tools (login required).
MatchPoint	Assess the key characteristics influencing job fit and satisfaction. This tool helps you, as an employee, better understand your goals, professional contributions, developmental needs and potential pitfalls. It assists both you and your manager in identifying where within the organizational structure you might find the best match with your interests, values, and skills.	MatchPoint is available to CFA Institute members and CFA Program candidates at no fee through the CFA Institute Career Tools (login required).
Working Styles	A 360-degree view of observable social behaviors and working styles. Identified by four themes: Expressive, Amiable, Driver, Analytical. Analyze work settings, work environment fit, communication style, and management style with development suggestions.	Working Styles is available to CFA Institute members and CFA Program candidates at no fee through the CFA Institute Career Tools (login required).

Name	Description	Where to find it
Take Five	Designed to assist you in identifying your strengths as they relate to you personally and within the working environment.	Take Five is available to CFA Institute members and CFA Program candidates at no fee through the CFA Institute Career Tools (login required).
Leadership Steps Assessment	This instrument from <i>FindingFIT</i> ¹ looks specifically at an individual's interest in leadership.	Leadership Steps Assessment (free access). If your results indicate people management may be a good fit, you may be interested in completing the Measuring Client, Leadership, and Management Impact activity .

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For reference, an example of a summary report showing a financial professional's interests and motivations is available at the end of this activity.

SUMMARY EXERCISE

After completing a sampling of the interest and motivation assessments listed above, review your results and compare them across instruments. What are the recurring messages about your interests and motivations? Do they ring true for you? How could this information help direct your career path? Capture your thoughts here:

NEXT STEPS

Congratulations on completing this set of data collection exercises! Please remember to save your results for each set of exercises you complete; they will be used for the Data Analysis and Career Implications activity.

We encourage you to engage in the [next set of data collection exercises](#), which will address understanding your skills.



DATA COLLECTION: UNDERSTANDING SKILLS

Skills refer to abilities or talents that an individual does or does not possess. They highlight personal strengths and weaknesses. While **interests and motivations** tell us what an individual likes to do and **values** tell us what an individual wants or prefers to do, skills tell us what an individual has the ability to do. The importance of individual skills lies in the fact that different jobs require different skills.

To understand your own individual skills, and hence your strengths and areas for development, complete the Skills Assessment exercise below.

SKILLS ASSESSMENT EXERCISE

STEP 1: SELF-EVALUATION

Conduct a self-evaluation of your skills using the assessment below. Carefully consider and study the skill areas, which play an important role in work and private lives. For each skill area, rate yourself from 1 to 5 (1 is worst and 5 is best).

Skill Area	Description	Rating
Communication	Communicates clearly and concisely	
Listening	Listens actively and effectively	
Creativity	Innovates to add value	
Execution	Exhibits attention to detail	
Teamwork	Operates efficiently in a team environment	
Stress management	Keeps calm and composed under difficult circumstances	
Interpersonal	Builds effective relationships	
Conflict management	Resolves, rather than avoids, conflicts	

Skill Area	Description	Rating
Integrity	Exhibits professional and personal integrity and strength of character	
People management	Treats all employees fairly	
Process management	Works within or across departments to finish projects on time	
Technical expertise	Possesses in-depth knowledge of the business and the industry	
Role model	Leads by example	
Mentor	Coaches others	
Judgment	Takes calculated risks by considering all facts and information	
Ownership mentality	Operates like an owner	

Once you've completed your **self-rating**, identify your top three strengths and areas for development and list them below.

Top 3 Strengths

- 1.
- 2.
- 3.

Top 3 Areas for Development

- 1.
 - 2.
 - 3.
-

STEP 2: GATHER FEEDBACK FROM OTHERS

While completing a self-evaluation is a great first step, it is also important to seek feedback from others. We recommend seeking feedback from sources representative of both your work and private life. To obtain work-related feedback, select at least five work colleagues and ask them to rate you from 1 to 5 on the same skills that you used in your self-evaluation (without, of course, sharing your own assessment results with them). You should also select at least three people who know you well in your private life (significant other, family member, friend, etc.) and repeat this process.

To gather this feedback from others, you can use one of the following options:

- Print the last page of this PDF (from the Appendix) and distribute paper copies.
- Copy the table in Step 1 of this exercise and paste it into an email.
- Copy the skill areas into one of the many simple online survey tools available, set a rating scale from 1 to 5, and distribute the online survey.

STEP 3: CALCULATIONS

Now it is time to combine your ratings and do some calculations. You can do this work manually in the table below. To do this:

- Enter all the ratings below.
- For each skill, calculate an average score for all of your non-self-ratings for each skill.
- For each skill, calculate the difference between your self-ratings and others (= average non-self-ratings – self rating).

Skill area	Self	Work					Other			Average non-self-ratings	Difference of others vs. self
		1	2	3	4	5	1	2	3		
Communication											
Listening											
Creativity											
Execution											

Skill area	Self	Work					Other			Average non-self-ratings	Difference of others vs. self
		1	2	3	4	5	1	2	3		
Teamwork											
Stress management											
Interpersonal											
Conflict management											
Integrity											
People management											
Process management											
Technical expertise											
Role model											
Mentor											
Judgment											
Ownership mentality											

STEP 4: PROCESSING RESULTS

Prepare a summary of your top three strengths and your top three areas for development as rated by your **work colleagues** and list them below.

Top 3 Strengths

1.

2.

3.

Top 3 Areas for Development

1.

2.

3.

With regard to **private life**–related feedback, your spouse, significant other, or a close relative or friend may be the best person to provide a candid assessment of your skills and abilities. Prepare a summary of the top three identified strengths and top three areas for development from these people and list them below.

Top 3 Strengths

- 1.
- 2.
- 3.

Top 3 Areas for Development

- 1.
- 2.
- 3.

Finally, once this exercise is completed, compare your self-evaluation and feedback summaries from all of your sources. In most cases, your self-evaluation and your feedback summaries will differ. What you consider your strengths may not be viewed as such by your evaluators. Similarly, you may be surprised that your evaluators are able to find many more development areas than you did.

The objective of comparing your self-evaluation with the feedback provided by others is to give you an indication of how self-aware you are. If there is a conflict or discrepancy between your self-evaluation and your evaluator feedback, then it implies that (1) you are not as self-aware as you think and/or (2) your conduct is not reflective of your true skills.

In either case, the simple fact is that the feedback from your evaluators is critical to help you assess your personal blind spots. Whether you like it or not, perceptions are reality, especially in a work environment. And perceptions shape your career progression.

NEXT STEPS

Congratulations for completing this data collection activity! Please remember to save your results on each set of exercises you complete; they will be used for the Data Analysis and Career Implications activity.

We encourage you to engage in the [next set of data collection exercises](#), which will address assessing your personality characteristics.

APPENDIX: AN OPTION FOR GATHERING FEEDBACK

SKILLS ASSESSMENT

In order to gain more insight into my personal skills, my strengths, and my development areas, I ask for your candid feedback using the following assessment.

Are you a: Work colleague

Other (significant other, family, friend, etc.)

Please provide a rating from **1 to 5 (1 is worst and 5 is best)** for each one of the following skill areas. Please use “n/a” when a skill area is “not applicable” and not rated.

Skill Area	Description	Rating
Communication	Communicates clearly and concisely	
Listening	Listens actively and effectively	
Creativity	Innovates to add value	
Execution	Exhibits attention to detail	
Teamwork	Operates efficiently in a team environment	
Stress management	Keeps calm and composed under difficult circumstances	
Interpersonal	Builds effective relationships	
Conflict management	Resolves, rather than avoids, conflicts	
Integrity	Exhibits professional and personal integrity and strength of character	
People management	Treats all employees fairly	
Process management	Works within or across departments to finish projects on time	

Skill Area	Description	Rating
Technical expertise	Possesses in-depth knowledge of the business and the industry	
Role model	Leads by example	
Mentor	Coaches others	
Judgment	Takes calculated risks by considering all facts and information	
Ownership mentality	Operates like an owner	

Please return this information to me by _____.

Thank you for your assistance!



DATA COLLECTION: ASSESSING PERSONALITY, BEHAVIORAL STYLE, AND PSYCHOLOGICAL CHARACTERISTICS

Personality refers to psychological characteristics, such as emotions, behaviors, and habits. Many tools and instruments have been developed to help individuals assess their personality, behavioral style, and psychological characteristics and match them with work environments, occupations, and jobs.

Below are some you may want to explore. Additionally, most universities will make similar tools available for their students (and often alumni as well).

Name	Description	Where to Find It
The Big 5 Personality Test	This assessment measures the five basic personality factors (agreeableness, conscientiousness, emotional stability, extraversion, and openness to experience) and aligns with the <i>FindingFIT</i> ¹ model.	Free access on the OutOfService website

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Name	Description	Where to Find It
Myers–Briggs Type Indicator (MBTI)	This is another well-known and broadly used personality factor assessment designed to measure psychological preferences in how you perceive the world and make decisions. MBTI assessments are typically proprietary, so to take the assessment you can expect to pay anywhere from \$50 to \$250.	<ul style="list-style-type: none"> • If you are interested in taking the true MBTI assessment, you can visit www.cpp.com. • There are a plethora of MBTI-based assessments available online, including this one, but the best way to take full advantage of this assessment is to use a certified professional experienced in administering and interpreting the results. • The CFA Institute Career Tools (login required) hosts a similar assessment available at no fee for CFA Institute members and CFA Program candidates, CenterMark, which examines the same four factors as the MBTI. • Once you have completed the MBTI assessment, you can reference Appendix B of <i>Career Success: Navigating the New Work Environment</i> (from <i>FindingFIT</i>) for more information about MBTI interpretation and types.

Name	Description	Where to Find It
CenterMark	Assess the key attributes and behaviors associated with job performance and satisfaction. This tool provides an in-depth view of 11 key areas associated with job performance for each of the 16 Myers–Briggs types, including characteristics, contributions to the organization, management style, communication style, learning style, problem solving, decision making, conflict resolution, motivators, team participation, change management, and growth opportunities.	CenterMark is available to CFA Institute members and CFA Program candidates at no fee through the CFA Institute Career Tools (login required).
Keirsey Temperament Sorter	This self-assessed personality questionnaire is designed to help you better understand yourself and others and is similar to the MBTI.	You can access a free sorter online along with a plethora of additional resources and workshops available at a cost.
<i>FindingFIT's</i> Predisposition Test	Both Predisposition and Locus of Control exercises address personality dynamics.	<i>FindingFIT's Predisposition Test</i> is available at no charge from the University of Virginia's Darden School of Business.
<i>FindingFIT's</i> Locus of Control	This exercise helps determine the extent to which you believe you can control events that affect you.	See Appendix A of <i>Career Success: Navigating the New Work Environment</i> .
The DISC Assessment	Another useful inventory that helps you understand yourself and how others relate to you. It explores behavioral traits across four key dimensions from which the acronym is derived—dominance, influence, steadiness, and conscientiousness.	You can access a free version of this assessment online along with a variety of additional resources available at a cost .

Name	Description	Where to Find It
Herrmann Brain Dominance Instrument (HBDI)	Similar to both the MBTI and DISC in its cognitive style and model, this instrument aims to measure and describe thinking preferences.	A free sample report is available online along with additional (at cost) resources .
Enneagram of Personality	Also referred to as simply Enneagram, this model of personality is based on nine interconnected types that are represented by the points of a geometric figure.	Additional information and access to the assessment (at cost) are available online .
Strong Interest Inventory (SII)	The SII provides a wealth of information, including 6 general occupational themes, 30 basic interest areas, and hundreds of occupations and jobs. The basic interest areas cover a variety of work roles, such as sales, management, teaching, finance, and investing, whereas jobs cover a variety of positions in business, government, military, and so on.	The SII assessment is available (at cost) through CPP. The traditional assessment requires interpretation and consultation with a trained administrator, however, CPP does allow individuals to purchase the iStartStrong report which provides an interpretation of results without an intermediary.
Working Styles	A 360-degree view of observable social behaviors and working styles. Identified by four themes: Expressive, Amiable, Driver, Analytical. Analyze work settings, work environment fit, communication style, and management style with development suggestions.	Working Styles is available to CFA Institute members and CFA Program candidates at no fee through the CFA Institute Career Tools (login required).
Take Five	Designed to assist you in identifying your strengths as they relate to you personally and within the working environment.	Take Five is available to CFA Institute members and CFA Program candidates at no fee through the CFA Institute Career Tools (login required).

SUMMARY EXERCISE

After completing all or a sampling of the personality, behavioral style, and psychological assessments listed above, review your results and compare them across instruments. What are the recurring messages? Do they ring true for you? How could this information help direct your career path? Capture your thoughts here:

NEXT STEPS

Congratulations on completing this set of data collection exercises! Please remember to save your results for each set of exercises you complete; they will be used for the Data Analysis and Career Implications activity.

We encourage you to engage in the [next set of data collection exercises](#), which will address determining your lifestyle preferences.



DATA COLLECTION: DETERMINING LIFESTYLE PREFERENCES

Some values, interests, and abilities may be difficult to satisfy through work. Yet, they are important and define who we are as individuals. Their expression and attainment is critical to our psychological well-being. Career decisions can impact this. For example, a passionate tennis player who regularly competes in local club tournaments or a singer who regularly performs in concerts with a band may well find a job that requires extensive travel frustrating because it interferes with practices and/or performances. Effective career management requires that appropriate consideration also be given to nonwork interests and values in making career decisions.

To understand your own lifestyle preferences, and hence the things that may impact your overall life satisfaction, complete the Lifestyle Preferences Exercise below. A completed example of this exercise for reference is available at the end of this data collection activity.

LIFESTYLE PREFERENCES EXERCISE

Complete the table below. As you think about each element, identify general, rather than specific, characteristics where you can. For example, when you are thinking about your preferences for a job, rather than simply naming a job title, think of such characteristics as how much travel is required or whether it is a more generalist or specialized job. Include other lifestyle activities or attributes that you feel are relevant to you—for example, leisure activities, educational needs of children, the size of your primary residence, ownership of a second or third home, number of material possessions, and so on.

Lifestyle Activity	Preferences
Occupation	
Job	

Lifestyle Activity	Preferences
---------------------------	--------------------

Working hours

Commuting time

Work environment

Location

Family activities

Personal activities

Community or social
activities

NEXT STEPS

Congratulations on completing this final data collection exercise! We encourage you to engage in the [Data Analysis and Career Implications](#) activity next (please remember that the results of each set of data collection activities you completed will be used for this activity).



DATA ANALYSIS AND CAREER IMPLICATIONS

The interplay of values, interests, skills, and preferences defines who we are as individuals. Therefore, another critical step in the self-awareness process consists of analyzing the data gathered in the self-exploration process and identifying themes. Themes are like a thread connecting your decisions, behaviors, and life events and coloring your view of life. Thus, the objective of this data analysis is to develop “life themes” that define you and to consider their implications in your career decision making.

Completed examples of these exercises for reference are available at the end of this activity.

REVIEW AND CATEGORIZATION

In order to effectively develop life themes, you will need to pull together all that you have learned about yourself in the previous exercises.

1. Carefully review and study each source of information from the [data collection activities](#) and any additional instruments you used, such as those in the *FindingFIT*¹ model and those in the [CFA Institute Career Tools](#) (CFA Institute member or CFA Program candidate login credentials required).
2. Develop themes specific to each data source. (Themes may be supported by more than one data source, and sometimes different sources lead to conflicting themes. That’s OK.)
3. Next, categorize all of the themes from Step 2 based on theme similarity, such as location, occupation, job/roles, work environment, work–life balance, life outside work, and so on.

¹Portions of *Career Success: Navigating The New Work Environment* are used with permission from *FindingFIT*. *FindingFIT* is a copyrighted publication of the University of Virginia Darden School Foundation. A full version of *FindingFIT* is available for purchase at <http://store.darden.virginia.edu/findingfit>.

DEVELOPING LIFE THEMES—SELF-ASSESSMENT

Based on your review and categorization work above, complete the following table. Be sure to keep the following points in mind.

- You should be able to identify at least 10 life themes that define you as an individual from the data instruments you have generated.
- Narrow and focused life themes are generally better than broad, all-encompassing statements.
- Do not overlook or ignore data that contradict your life themes. With so many moving parts, contradictions are normal and to be expected.
- Most importantly, retain objectivity as you develop your life themes. This means that your life themes should be based on observed data found in the instruments. You should not attempt to use data selectively to support your existing views or make inferences or judgments from the data.

Life Theme	Supporting Evidence	Contradictory Evidence
1.		
2.		
3.		
4.		

Life Theme	Supporting Evidence	Contradictory Evidence
5.		
6.		
7.		
8.		
9.		
10.		

DEVELOPING LIFE THEMES—EXTERNAL ASSESSMENT

For this exercise, choose someone (e.g., a peer, colleague, etc.) to serve as your career counselor. The person you choose does not need to have intimate or deep knowledge of you as an individual, but they should be familiar with the types of data collection exercises and instruments you've been using. Ask your career counselor to prepare a table similar to the one you just did solely from the data you have generated in the various instruments (you will need to be prepared to provide summary information/results from each of the data collection activities in which you engaged).

Discuss with your career counselor any differences in life themes that emerge between the self-assessment and the external assessment. Once the differences have been discussed and resolved, finalize a list of your life themes.

CAREER IMPLICATIONS—SELF-ASSESSMENT

Once a set of life themes has been developed, the final step is to identify the potential implications of life themes for occupations and jobs. Life themes are derived from the various data instruments. Career implications, in turn, are developed from life themes. The process of developing career implications from life themes is facilitated by the following:

1. Grouping all life themes that appear to be related into a category
2. Carefully reviewing the life themes contained in each category to assess their career implications
3. Using the following table to capture your results

In conducting this exercise, keep the following points in mind.

- You should be able to identify at least five career implications from the life themes that you developed above. An example of a career implication based on the example that has run through this text might be “should consider supervisory/managerial roles” or “should find opportunities based in Colorado.”
- More focused career implications are generally better than broad, all-encompassing implications.
- As with life themes, some contradictions in career implications are to be expected. Do not overlook or ignore them.
- Most importantly, retain objectivity as you develop your career implications. This means that your career implications should be supported by multiple life themes. You should not attempt to use life theme data selectively to support your existing views or make inferences or judgments.

Career Implication	Supporting Evidence (life themes that support the implication)	Contradictory Evidence (life themes that contradict the implication)
1.		
2.		
3.		
4.		
5.		

CAREER IMPLICATIONS—EXTERNAL ASSESSMENT

Ask the career counselor you chose for the life themes external assessment to prepare a table similar to the one you just did solely from your life themes.

Brainstorm and discuss with your career counselor additional career implications that could be derived from your life themes. Finalize the list of career implications.

CONCLUSION AND NEXT STEPS

Congratulations on completing the Data Collection activities! You should now have a better sense of how you have been shaped and informed by your past experiences and a better understanding of your personal values, interests, motivations, skills, and preferences. Keep copies of your life themes and career implications tables accessible and revisit them periodically. This information is critical in making informed career decisions and is useful in your self-marketing efforts.

You may be interested in engaging in the [Awareness of Environment](#) or [Assessing and Pursuing Employment](#) activities next.



AWARENESS OF ENVIRONMENT

The goal of environmental exploration is to gain awareness of different occupations and work environments and to identify those that may provide compatibility with your life themes—that is, the combination of values, interests, and abilities specific to you. Many surveys show that the two most common reasons for switching jobs are a dislike for the corporate culture of the current employer and inability to work effectively with the current manager. While organizational exploration and awareness has many dimensions, the exercises in this activity will focus on the following:

- Corporate culture
- Management style of prospective manager

Completed examples of each exercise for reference are available at the end of this activity.

EVALUATING CORPORATE CULTURES

Identify three companies you would consider working for in the future. For each identified company as well as the organization you currently work for (if you are employed), perform each of the following actions:

1. Obtain relevant information relating to each company's culture from the company website and other potential sources mentioned in Chapter 4 of *Career Success: Navigating the New Work Environment*.
2. Develop a summary statement that defines each company's culture.
3. Investigate danger signals, if any.
4. State which company represents a good fit with your values. Provide a justification for your answer.

Company Name	Culture Summary	Danger Signals	Why/Why Not a Fit?
--------------	-----------------	----------------	--------------------

Current company
(if applicable)

When you are considering employment at a given company, one of the most powerful strategies at your disposal for developing an understanding of that company’s culture and style of management/leadership is the informational interview. Try to identify an individual at your desired company who works in a position similar to the one you want. If you are able to get this type of opportunity, here are some examples of questions that can help you learn more about the company’s culture (feel free to add some of your own):

Contact/Company	Questions	Responses
-----------------	-----------	-----------

How would you describe the organization’s culture?

What are the most common suggestions for organizational improvements you hear from colleagues?

Contact/Company	Questions	Responses
	<p>What are the top two or three reasons your colleagues would give for why it is a great place to work?</p> <p>Do you think employees who have been here for several years view the organization's culture differently than newer hires?</p> <p>What aspects about the organization's culture might I not learn from touring the offices or reviewing the company website/materials?</p> <p>How would you characterize the management styles of the senior leaders?</p>	

CLARIFYING YOUR PREFERENCES IN MANAGERS

Identify the main traits of a manager that will bring out the best in you.

Identify the personal values you will find desirable in your prospective manager (your results from the [Value Identification Exercises](#) may be helpful).

Develop five (or more) questions that you would ask a prospective manager during the interview process to determine if he or she possesses the management style and values you are looking for.

1.

2.

3.

4.

5.

6.

7.

8.

NEXT STEPS

Congratulations for completing this Awareness of Environment activity! You may be interested in completing the [Assessing and Pursuing Employment exercises](#) next.



CLIENT, LEADERSHIP, AND MANAGEMENT IMPACT

In general, the initial stage of a career tends to be a functional/process management role. In this stage, client impact (most often, internal clients) has a major effect on the level of success achieved and paves the way for career advancement. In the middle stage of a career, career roles tend to evolve toward process and people management roles. In this stage, both client impact (a mix between internal and external clients) and explicit leadership and management impact facilitate career success and advancement. And in the later stage of a career, success as a senior business manager is primarily influenced by the degree of explicit leadership and management impact.

Some individuals may elect to deepen their expertise in a specific technical area and allow their careers to revolve around subject matter expertise rather than shifting to people or business management responsibilities. Regardless, any career choice can benefit from a focus on seeking a successful combination of client, management, and leadership impact through the various stages of a professional career.

MEASURING CLIENT IMPACT

One way of assessing the level of client impact is by analyzing your relationship and interactions with **internal** and **external** clients. Ask yourself the following questions. In your responses, be sure to identify specific, concrete examples.

Questions

Your Responses

Do your clients approach you to seek factual information, or do they ask for your views and opinions on general or specific issues they face? Do you think they see you as both a content expert and a creative, independent thinker?

Do they listen actively and attentively when you speak?

Does your manager ask you to represent her and the department at interdepartmental meetings?

Questions**Your Responses**

Does your manager assign you responsibilities that go beyond your normal work duties?

Are you invited to speak to external clients?

Do external clients share their problems with you and seek your input for potential solutions?

Notice that client impact is an external and practical test of your success in the initial stages of your career. Assessing client impact provides a simple reality check of performance and indicates what others think of you and your ability to add value. To improve your client impact, train yourself to think outside the box, to be different and original, and to go deeper when working on problems. It is often helpful to identify a list of individuals (colleagues, clients, or friends) whom you respect for their creativity and independent thinking, hold discussions with them, and analyze them closely in terms of their thinking process. Learn from them and see if you can contribute to the dialogue more meaningfully over time.

MEASURING LEADERSHIP IMPACT

In order to determine whether you are having meaningful leadership impact within your company and your industry, ask yourself the following questions. In your responses, be sure to identify specific, concrete examples.

Questions

Your Responses

Do you accept the environment around you, or do you creatively think about ways to improve it? Are you willing to take action to make the cultural changes you think are important?

Are you a problem solver, a problem creator, or a “complexifier”? Can and do you bring disparate parties together to solve problems?

Do you keep your eye on the long-term mission and help others do the same? Do you help set direction for others?

Questions

Your Responses

Are you able to help people adjust to change? Can you keep people focused on the opportunity that change can bring with it?

Do you seek out opportunities to mentor others? Are you asked to mentor others?

Do individuals in other departments respect you and follow your direction even though they do not directly report to you?

Questions

Your Responses

Do people see you as an innovator? Do you inspire others to take risks to innovate?

Do others follow because they want to or because they have to?

Do you inspire others to push themselves to accomplish more or learn more than they would otherwise?

Questions**Your Responses**

Are you willing to take professional risk to try to do the right thing? Can people count on you to stand up for the right thing?

Do you have a healthy balance between advocacy and inquiry? Are you drawing in new ideas or just expressing your own?

In highly stressful situations, can you be counted on to remain calm and logical? Can you help others to stay calm and think clearly?

Again, notice that leadership impact is an external and practical test of your success. It is not important what you think of your ability to influence others. What counts is whether others perceive you as a leader and hence are willing to follow your example.

MEASURING MANAGEMENT IMPACT

To determine whether you are having meaningful management impact within your company and your industry, ask yourself the following questions as they are appropriate to your work situation. In your responses, be sure to identify specific, concrete examples.

Process Management Questions	Your Responses
-------------------------------------	-----------------------

Are you continually looking for better ways to get things done?

Are you willing to take some risk to question the status quo?

Do coworkers see you as an expert? Do they seek your advice?

**Process Management
Questions**

Your Responses

Are you building controls into processes before problems occur?

Do you think through the creation of the infrastructure to ensure that process improvements are scalable and sustainable?

Can you focus sufficiently on the details and the longer-term vision simultaneously?

Can you learn from your mistakes and improve systems to reduce future errors?

**People Management
Questions**

Your Responses

As a manager, are you able to attract talented professionals to work for you?

As a manager, are you able to retain your best talent over time?

Do other managers seek your advice for sticky personnel issues? Do you seek theirs?

Are your employees often chosen for higher-level positions?

**People Management
Questions**

Your Responses

Do you encourage your employees to speak up and support creative thinking, or do you stifle it with an autocratic management style?

Do your employees trust you to do the right thing, especially under duress?

Do you work to advance your employees' careers, or are you threatened by them?

Do you encourage and protect your subordinates when they take calculated risks and fail, or do you point blame?

**People Management
Questions**

Your Responses

Are you happy to see employees of yours be given new opportunities, or do you find it threatening?

Do you always have to be the one with the answer, or do you feel comfortable when your subordinates come up with a better solution?

Do you have a mechanism to get honest feedback from your employees? Do they trust you enough to tell you what you are doing well and what you are doing poorly?

Are you comfortable when your subordinates respectfully question or push back on your ideas?

**People Management
Questions**

Your Responses

Do you seek opportunities to provide useful feedback to your employees, or do you wait until it is required?

Do you sit with employees multiple times over a year to provide useful, actionable feedback?

Do you take appropriate and timely action with problem employees or do you procrastinate to avoid the conflict?

Managing people is very hard work if it is done well. Often people will step into such a role and not think that they need to act differently. Management usually requires some internal reflection and new skill building. It is often useful to seek out resources, including books and articles by experts in the management field that can help you become a successful people manager.

CONCLUSION AND NEXT STEPS

It is a fact that the vast majority of professional jobs are secured through personal contacts and networks. Your personal and professional reputation is what will help you achieve your career goals and enlarge your circle of contacts. The more professionally respected you are, the more contacts you will develop. Focusing on your client, leadership, and management impact will help you build your professional reputation and enhance your career opportunities.

Congratulations on completing this set of exercises on measuring your client, leadership, and management impact! We encourage you to explore the [other exercises](#) (if you have not already completed them).



ASSESSING AND PURSUING EMPLOYMENT

Let's consider some exercises that you can apply to your current employment and/or career, particularly if you are feeling unsatisfied or considering a job change any time soon.

- If you are currently employed and considering a job change, we recommend completing the first exercise “Assessing Current Employment” before moving on to “Job Applications and Interviews.”
- If you are looking for initial or new employment, the “Job Applications and Interviews” exercise may prove helpful.

ASSESSING CURRENT EMPLOYMENT

In this exercise, read through the column labeled “Source of Unhappiness” and check all that apply to your current employment. For the items you checked, read the guiding questions and record your answers or thoughts. Please note that some of these questions will resonate better if you have already completed the set of [Data Collection activities](#).

✓ Source of Unhappiness	Guiding Questions	Your Answers/Thoughts
A conflict between your “always valued” values and the corporate culture of your present employer	Can it be resolved? If so, how? If not, then you may have to look for a more compatible employer.	
The management style and/or personal values of your supervisor	Can you ask to be reassigned to another department or manager? If so, what is your action plan? If not, then you may have to look for another employment and manager.	

✓ Source of Unhappiness	Guiding Questions	Your Answers/Thoughts
Incompatibility between your current job and your interests, motivations, and/or skills	You need to more carefully develop your career aspirations. In this case, changing employers will simply move the problem (i.e., you) from one employer to another, rather than solve it. What have you learned in previous exercises that can help get these in alignment?	
Consistency and compatibility between your current employment and your life themes and lifestyle preferences	You need to more carefully develop your career aspirations. In this case, changing employers will simply move the problem (i.e., you) from one employer to another, rather than solve it. What have you learned in previous exercises that can help get these in alignment?	
Lack of reward and recognition from your current employer for your efforts and contributions	Seek to understand why. For example, conduct a reality check by evaluating the degree of client and/or leadership impact you are having. Based on your skill and performance levels as well as industry and regional reward practices, are your expectations realistic?	

In many instances, individuals tend to blame the employer/manager for an unhappy employment situation. However, in many such cases, the problem is not the employer/manager but the individual's lack of [self-awareness](#), [environmental awareness](#), and understanding of what is sought from work. In these cases, changing employers does not solve the real problem. In other instances, changing the employer/manager would be a reasonable strategy to follow.

JOB APPLICATIONS AND INTERVIEWS

You may find the [Awareness of Environment content and activities](#) helpful context for this exercise.

STEP 1

Identify three employers and three jobs that you would like to pursue.

Company	Job and Brief Description
----------------	----------------------------------

STEP 2

Analyze the corporate culture of each employer, and prepare a summary statement that defines their cultures. If they are the same companies you identified in the Awareness of Environment section, you can move ahead to Step 3.

Company	Corporate Culture Summary
----------------	----------------------------------

STEP 3

Conduct a value test exercise, as you did in the [Clarifying Values section](#), to determine compatibility of each of the three corporate cultures with your “always valued” values.

Company Name
Corporate Culture

Your “Always Valued” Values	Supports, Conflicts with, or Is Not Relevant to Value?	For each “always valued” value that conflicts with the decision at hand, explain either how you will resolve the value conflict or why you are willing to live with the value conflict.
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

Company Name

Corporate Culture

Your "Always Valued" Values	Supports, Conflicts with, or Is Not Relevant to Value?	For each "always valued" value that conflicts with the decision at hand, explain either how you will resolve the value conflict or why you are willing to live with the value conflict.
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

Company Name

Corporate Culture

Your “Always Valued” Values	Supports, Conflicts with, or Is Not Relevant to Value?	For each “always valued” value that conflicts with the decision at hand, explain either how you will resolve the value conflict or why you are willing to live with the value conflict.
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

STEP 4

From the job postings, identify the skills that are required for the three jobs and compare the required skills with your strengths and weaknesses as identified in the [Understanding Skills exercise](#).

**Company Name and
Job Name**

Skills Required

Top 3 Strengths

Level of Compatibility with Job Skills Requirements

1.

2.

3.

Top 3 Development Areas

Level of Compatibility with Job Skills Requirements

1.

2.

3.

**Company Name and
Job Name**

Skills Required

Top 3 Strengths

Level of Compatibility with Job Skills Requirements

1.

2.

3.

Top 3 Development Areas

Level of Compatibility with Job Skills Requirements

1.

2.

3.

**Company Name and
Job Name**

Skills Required

Top 3 Strengths

Level of Compatibility with Job Skills Requirements

1.

2.

3.

Top 3 Development Areas

Level of Compatibility with Job Skills Requirements

1.

2.

3.

STEP 5

Determine the consistency and compatibility of the three employment opportunities with the life themes you developed in the [Data Analysis and Career Implications](#) section.

Company Name and Job Name

Life Themes	Level of Consistency and Compatibility with Job
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Career Implications	Level of Consistency and Compatibility with Job
1.	
2.	
3.	
4.	
5.	

Company Name and Job Name

Life Themes

**Level of Consistency and
Compatibility with Job**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Career Implications

**Level of Consistency and
Compatibility with Job**

- 1.
 - 2.
 - 3.
 - 4.
 - 5.
-

Company Name and Job Name

Life Themes

**Level of Consistency and
Compatibility with Job**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Career Implications

**Level of Consistency and
Compatibility with Job**

- 1.
 - 2.
 - 3.
 - 4.
 - 5.
-

STEP 6

Which employer and job offer has the highest level of compatibility with your “always valued” values and strengths? Justify your answer.

STEP 7

For the most compatible employer and job you have identified, draft a cover letter explaining why you are well suited for the employment opportunity. The cover letter should not exceed one page.

STEP 8

Identify 10 questions that you would ask during the interview process to confirm compatibility with the following:

- Skills needed for the job
- Corporate culture
- Values and management style of prospective manager

Interview Questions

- 1.
 - 2.
 - 3.
 - 4.
 - 5.
 - 6.
 - 7.
 - 8.
 - 9.
 - 10.
-

CONCLUSION

Defining and managing your career is your responsibility. Career exploration—a careful and deep analysis of yourself and your environment—forms the cornerstone of effective career management and compatibility, or fit, between you and the environment and should be the guiding principle in career decision making.

In other words, do the following:

- Choose a profession that motivates you and is likely to become your passion over time.
- Choose a job, role, or function that leverages your natural strengths.
- Choose a manager whose values and management style suit you and who can become your mentor.
- Choose an employer whose corporate culture is compatible with your values.

Whether you are a fresh graduate or an experienced professional, do not lose sight of these guiding principles.

Congratulations on completing this set of exercises on assessing and pursuing employment! We encourage you to explore the [other exercises](#) (if you have not already completed them).

COMPLETED EXAMPLES FROM DATA COLLECTION: ANALYZING PAST EXPERIENCES

EXAMPLE 1: YOUR LIFE'S STORY—PAST AND FUTURE

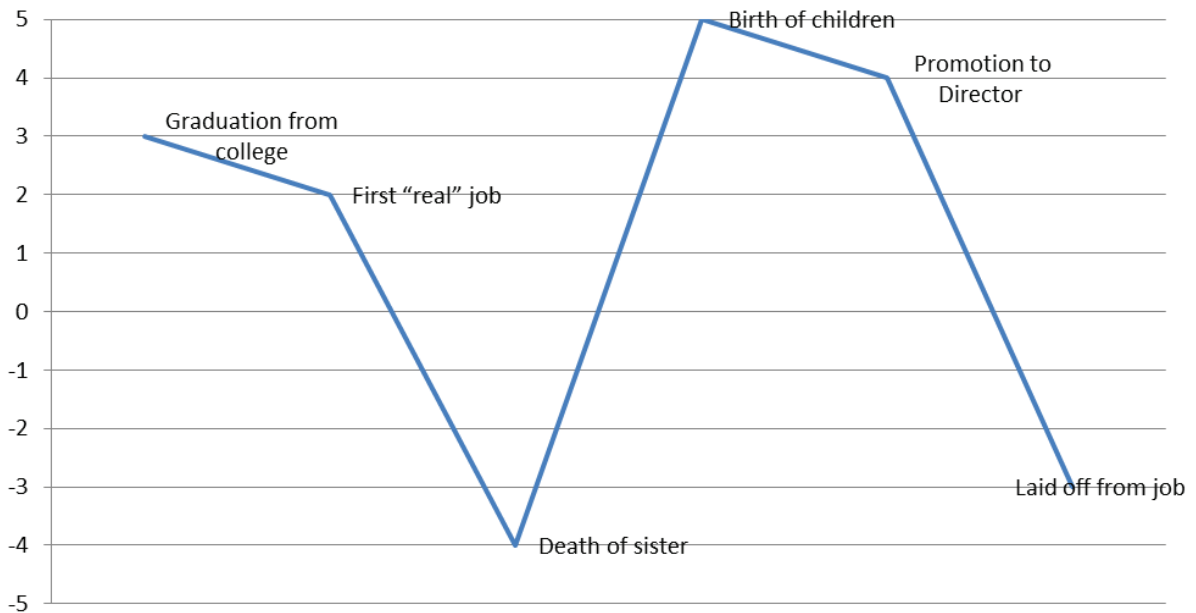
STEP 1: YOUR LIFE'S STORY IN 400 WORDS OR FEWER

Grew up outside Manchester. It was me, mum, dad, and two sisters. Once I gave up thinking I'd be a professional rugby player when I grew up, I assumed I'd be an accountant like my dad. Got decent marks in school, participated in drama and was on the student leadership team. I went on to study finance and economics at York. York University was fantastic; I met my wife, Erica, there and made the best of friends, but the experience was dampened by losing the older of my sisters in an automobile accident during that time. That was really hard on our family and bonded us even more tightly. Anyway, Erica and I got married the summer after graduation. I also got a job as an operations analyst straight after university. I liked dealing with the customer inquiries and didn't mind some of what it took to resolve trade problems, but I pretty much hated tracking and checking trades. Didn't seem to have all my father's accounting sensibilities after all. I fortunately was able to move to a client relations role at another company. I know I was pretty lucky with that because loads of my friends were really struggling to find jobs at all but I was able to secure the offer in about eight weeks without even letting too many people other than friends and family know that I was looking for a different role. Was comfortable at the new company, which was useful as my twins were born about three and a half years into my time there and Gavin needed a bit of medical attention early on. My team was really understanding. Both the twins are doing great now and have a younger brother, Clyde. Anyway, got promoted to director level after a couple years more. The additional people management responsibilities that came with the promotions were surprisingly challenging but I found I really enjoyed the dimension it added. Late last year, we started hearing rumors about possible redundancies coming down the line. They were spot on: myself and two others from my team were made redundant, and I heard one of my reports was moved right into my position. I don't seem to be having the same luck I did last time I searched for jobs; it's been six months and nothing. I've signed up for the CFA Program.

STEP 2: KEY EVENTS TABLE

KEY EVENT	EMOTIONAL IMPACT (-5 to 0 to +5)	KEY LEARNING OR INSIGHT
Graduation from college	3	I can accomplish long-term goals
First “real” job	2	Great to have a job but I want something more stimulating
Death of sister	-4	Life is short and family is what really counts in the end
Birth of children	5	Need to live for more than myself
Promotion to Director	4	I am capable and valued
Laid off from job	-3	I am not indispensable; I need to keep my skills and CV updated

STEP 3: CHARTING YOUR EMOTIONAL IMPACT SCORES



STEP 4: YOUR FUTURE

I really like the client relationship role. I like that it's expanding and requiring more direct and intimate knowledge of how products work. This is part of why I'm really keen to work through the CFA Program. I do think though in the end, I'd prefer to shift from corporate clients to individuals as clients. I'd like to take a relationship manager position at a mid-sized to large private bank that has its own asset management unit in-house while I'm studying for the CFA exams. Hopefully I can progress from there to heading up the CR function at that or a comparable-sized firm. I don't think I'd want to run my own firm, but I would like to move to more of a general senior leadership role with a real management stake in a place until I retire. After I retire, I envision myself, and Erica, traveling quite a lot and I'll probably take seats on some non-profit boards in my community. I'd love to spend my retirement years providing leadership to the arts community here.

STEP 5: INTERPRETING YOUR DATA

- Family is incredibly important to me
- I prefer my work focus on relationship management aspects but definitely want to have strong technical expertise in my background
- I have some entrepreneurial spirit but prefer to utilize it in a mature organizational environment
- I am ambitious but not urgently so
- I have a passion for drama and the arts

EXAMPLE 2: EDUCATIONAL EXPERIENCES

	Secondary/High School	College/University
Favorite courses	French poetry and history	Econometrics and investments
Least favorite courses	German, mathematics	Macroeconomic policy and economic planning
Best-grade courses	English literature and chemistry	Econometrics and investments
Worst-grade courses	French poetry and mathematics	Negotiating skills
Extracurricular activities	Soccer, music composition, and drumming	Cricket, tennis, music composition, and singing

EXAMPLE 3: PEAK (HIGH) AND TROUGH (LOW) EXPERIENCES

Peak Experience Description

Why It Felt Like a Peak Experience

Work Life

1. Earning the CFA charter

I studied for the CFA exams while working full-time in Abu Dhabi, United Arab Emirates. I passed CFA Level I on my first attempt but failed the Level II exam twice because I could not devote the appropriate time to studying. Then, I interrupted my CFA Program study to pursue an MBA degree. After acquiring my MBA degree, I started a new job in Paris, earning enough money to enjoy living in the city. I thought about dropping out of the CFA Program but decided not to do so. Instead, I promised myself that I would devote the required time and energy and make whatever sacrifices were necessary to complete the program. I passed the Level II and III exams and then went on to earn my CFA charter.

2. Joining a premier investment bank on Wall Street

After working at two mid-sized asset management companies, I joined a leading Wall Street investment bank. The corporate culture at this firm encouraged innovation and initiative taking. The firm was able to attract highly talented individuals, and I had the opportunity to work with some top thought leaders of our industry. My immediate supervisor was also one of the most amazing business managers I have ever worked with.

- I felt a strong sense of accomplishment and self-belief.
- I realized the importance of hard work and perseverance to achieve a goal.
- Through the learning that the exam preparation process entails, I realized how a continuing effort to acquire advanced technical knowledge can help me gain a sense of comfort at work and improve my overall performance.
- I enjoyed working in an intellectually stimulating environment. It challenged me, motivated me, and brought out the best in me.
- In working with my supervisor, I also realized the critical role that a good mentor plays in career development. I learned a lot about process and business management from him.

Peak Experience Description
Why It Felt Like a Peak Experience

Family Life*1. Birth of my children*

My wife's first pregnancy ended in a miscarriage. It was a traumatic event for both of us, perhaps because we were both mentally unprepared for such an event. The period when my wife was pregnant with our first child was full of fear and anxiety. But everything worked out fine in the end. When our second child was born, it was as much of a peak experience as the birth of the first.

- Both births provided a significant feeling of joy and strengthened my sense of family. I was very touched by the love and support we received from family and friends.

Personal Life*1. Giving back*

I set up a nonprofit organization to provide educational and health care services in Pakistan. I have invested a significant amount of time and energy conceptualizing, developing, implementing, and monitoring the various projects we have funded. I regularly visit our schools and medical clinics, which cater to families in some of the most underprivileged communities of Pakistan. To date, this is perhaps the most satisfying and fulfilling achievement of my life, one that I am truly proud of.

- Through the work of the non-profit organization, I have had the chance to see poverty from up close. This has made me realize how fortunate I am and how much I have been blessed with. I have developed a sense of gratitude as well as a sense of responsibility toward the less fortunate.

2. Living in Colorado

This small university town is consistently rated as one of the most desirable places to live in the United States. The weather is amazing, and the scenic beauty of the Rocky Mountains is breathtaking. The outdoor life and its myriad activities make it a favorite place for kids, and the lifestyle in general is relaxed, healthy, and progressive.

- Location has never been an important factor in my career decision making. But the comfort and happiness that living here has brought to my family make it very difficult to think about leaving this little paradise!

Trough Experience Description

Why It Felt Like a Trough Experience

Work Life*1. Opportunity to become the chief investment officer (CIO)*

I was working at an asset management firm as the director of research and strategy when the CIO position became open unexpectedly. The CEO of the firm called me into his office and informed me that he was going to look at external and internal candidates to fill the CIO position. He asked me to apply for the role and told me that, in his opinion, I had a very good chance of getting the job. This happened toward the early stage of my career, when I felt that I was not ready for the job. I was scared of assuming such a high level of responsibility, scared of the challenges it presented, and scared of failing. The lack of confidence and self-belief showed up during the interview process, and I didn't get the job. One year later, I also realized that in not pursuing the CIO opportunity more aggressively, I had seriously restricted career advancement options at the firm. This forced me to look for alternate career opportunities.

- This experience made me feel unhappy because I liked working at this firm and would have liked to pursue a long career there.
- Also, becoming a CIO was very much part of my long-term career objectives. But my lack of confidence in my own abilities got in the way of my taking advantage of an incredible opportunity when it was presented to me.
- Through this experience, I realized that no meaningful success can be achieved without taking some level of risk. Since then, I have not been afraid of accepting new challenges and responsibilities and have had more confidence in my ability to learn the skills needed to perform well in a new role.

Trough Experience Description

Why It Felt Like a Trough Experience

Family Life*1. Lack of work–life balance*

While at the Wall Street investment bank, I was responsible for running a research and new product development operation. In the sixth year of employment, the investment bank acquired another large research company and our offices were relocated to Wall Street to take advantage of the significant synergies offered by the new acquisition. It meant that my commute increased from 5 minutes to about 1 hour and 45 minutes each way! Over a period of about one year, I almost never saw my kids during the week and it became increasingly difficult to spend quality time with my wife.

- This experience resulted in extreme dissatisfaction and frustration with my lack of work–family life balance. It got to a point where work stopped being enjoyable and became a significant drag. I became seriously demotivated.
- Through this experience, I realized that achieving a reasonable balance between work and family life is a high priority for me. In fact, it is one important metric of how I measure my professional success.

COMPLETED EXAMPLES FROM DATA COLLECTION: CLARIFYING VALUES

EXAMPLE 1: VALUE IDENTIFICATION EXERCISE 1

What Makes You Happy or Unhappy?	Value Implication
Rude and disrespectful behavior makes me unhappy.	Treating others with respect and dignity is a value I uphold.
My manager gives me a lot of freedom, which makes me happy.	Working independently is a value I uphold.
Not finding time for my favorite hobby makes me unhappy.	Time for self is a value I uphold.
Too much business travel makes me unhappy.	Achieving work–life balance is a value I uphold.
I enjoy engaging in organizational politics to move up the ladder.	Seeking power and authority and earning significant compensation are values I uphold.

EXAMPLE 2: VALUE IDENTIFICATION EXERCISE 2

Questions to Consider	Your Responses
Which kind of occupation are you involved in?	Financial industry/investment management
Which kind of organization are you working for? Or are you self-employed?	Small, established firm
What job are you performing?	Serving as portfolio manager (PM) for high-net-worth (HNW) clients/private clients
What are your working hours?	Predictable schedule of standard business hours Monday–Friday, with occasional travel
What does the work environment look like?	Working with/managing small team; friendly, positive, collegial atmosphere; lots of autonomy

Questions to Consider	Your Responses
What is your commuting time?	25 minutes
Are you married? Do you have children?	Married with 2 children and a dog
Where are you living: a big city or a small town?	Urban community outside the I-95 beltway
What is the size of your home?	Large enough to meet our needs, but small enough to keep easily tidy/clean
What activities are you engaged in with your children? How much time do they take?	Sports and community activities—great community of friends with kids who help with rideshares
What kind and number of material possessions do you have?	Lots of tech in the house, but minimalistic otherwise—we have what we need and no more
What personal hobbies or activities are you engaged in? How much time do they take?	Rock climbing on the weekends with my spouse

EXAMPLE 3: VALUE CLARIFICATION EXERCISE

Always Valued	Sometimes Valued	Never Valued
1. Creating value for clients/solving problems	Earning significant compensation	Seeking titles and designations
2. Achieving work–life balance	Seeking power and authority	Seeking job security
3. Operating with integrity and fairness	Taking significant risks	Working independently
4. Treating others with respect and dignity	Influencing people/leadership	Seeking significant business travel
5. Seeking autonomy/control over time and objectives	Having time for self	Seeking competition
6. Helping others/giving back to society	Staying healthy and fit	Seeking recognition

	Always Valued	Sometimes Valued	Never Valued
7.	Working with talented people in an intellectually stimulating and relaxed environment		
8.	Living in a place where the family feels comfortable and happy		

EXAMPLE 4: VALUE TEST EXERCISE

Decision Area	Decision
Work Life	Should I consider the management buyout of my company?
Private Life	How will my spouse and children be impacted by my decision to take the new role (it requires more travel)?

WORK LIFE VALUE TEST

Always Valued	Supports, Conflicts with, or Is Not Relevant to Value?	For each “always valued” value that conflicts with the decision at hand, explain either how you will resolve the value conflict or why you are willing to live with the value conflict.
1. Creating value for clients/ solving problems	Supports	
2. Achieving work–life balance	Conflicts	As the public face of the company, I will have to undertake significant business travel. My spouse and I understand that for the first couple of years, there is no way to fully resolve this conflict. But we have discussed ways for me to spend better “quality” time with the family when I am not traveling.
3. Operating with integrity and fairness	Supports	
4. Treating others with respect and dignity	Not relevant	
5. Seeking autonomy/ control over time and objectives	Supports	
6. Helping others/giving back to society	Not relevant	

Always Valued	Supports, Conflicts with, or Is Not Relevant to Value?	For each “always valued” value that conflicts with the decision at hand, explain either how you will resolve the value conflict or why you are willing to live with the value conflict.
7. Working with talented people in an intellectually stimulating and relaxed environment	Supports	
8. Living in a place where the family feels comfortable and happy	Supports	

PRIVATE LIFE VALUE TEST

Always Valued	Supports, Conflicts with, or Is Not Relevant to Value?	For each “always valued” value that conflicts with the decision at hand, either explain how you will resolve the value conflict or why you are willing to live with the value conflict.
1. Creating value for clients/ solving problems	Not relevant	
2. Achieving work–life balance	Conflicts	As the public face of the company, I will have to undertake significant business travel. My spouse and I understand that for the first couple of years, there is no way to fully resolve this conflict. But we have discussed ways for me to spend better “quality” time with the family when I am not traveling.
3. Operating with integrity and fairness	Supports	
4. Treating others with respect and dignity	Not relevant	
5. Seeking autonomy/ control over time and objectives	Supports	
6. Helping others/giving back to society	Not relevant	

Always Valued	Supports, Conflicts with, or Is Not Relevant to Value?	For each “always valued” value that conflicts with the decision at hand, either explain how you will resolve the value conflict or why you are willing to live with the value conflict.
7. Working with talented people in an intellectually stimulating and relaxed environment	Supports	
8. Living in a place where the family feels comfortable and happy	Supports (no change of location will be necessary)	

Decision Area	Decision	Conclusions
Work Life	I will accept the management buyout offer of my company.	The decision to acquire my company presents a tremendous opportunity and is supported by most of my “always valued” values. This decision, however, conflicts with one important value (achieving work–life balance) because of the significant business travel. I believe this sacrifice is worth making in the short run because success in this venture may help me to achieve better balance in the long run.
Private Life	My family understands and supports my company buyout decision.	My family and I have discussed the short-term potential trade-offs in quality of life vs. the longer-term objective of being able to provide them with a higher quality of life/ better balance for all of us.

COMPLETED EXAMPLE FROM DATA COLLECTION: IDENTIFYING INTERESTS AND MOTIVATIONS

EXAMPLE: INTERESTS AND MOTIVATIONS REPORT

Motivated:

- By creative or innovative activities
- By cultural, academic, and intellectual activities
- By organizational and social association with others
- By activities that allow inquisitive, exploratory, analytical, and experimental thinking
- By performance-driven (internal) goals
- To manage and supervise businesses and processes
- To manage people and their activities
- To help others
- To work on projects that are planned, scheduled, and completed

Not motivated:

- By subordinate or supervised roles
- By recognition, status, or competitive gain
- To physically work with things and objects

The career areas that may represent a good fit with interests and motivations include:

- Research
- Management
- Training and counseling services
- Consulting and business services
- College or university teaching
- Music composition and arrangement
- Creative writing
- Human engineering and human skills development
- Sales engineering
- Journalism
- Physical education

COMPLETED EXAMPLE FROM DATA COLLECTION: DETERMINING LIFESTYLE PREFERENCES

Lifestyle Activity	Preferences
Occupation	Investment management
Job	People leader
Working hours	Standard/predictable (expect some late nights/ weekend work and occasional travel, but work/ life balance is critical for me)
Commuting time	30 minutes or less (want to work near where I live)
Work environment	Established firm (large enough for established procedures/policies but small enough for ideas/changes to be implemented—low level of bureaucracy)
Location	Northeast US corridor is preferred, but I'm willing to relocate (as long as it's near mountains).
Family activities	We do lots together! Want to fully support my children by being able to attend school/curricular events in person.
Personal activities	Love to read and go rock climbing in spare time with my spouse
Community or social activities	I like to give back by participating in board activities for my local community service group.

COMPLETED EXAMPLES FROM DATA ANALYSIS AND CAREER IMPLICATIONS

EXAMPLE 1: LIFE THEMES

Life Theme	Supporting Evidence	Contradictory Evidence
1. Enjoys managerial, supervisory roles	<ul style="list-style-type: none"> • Owns a business (PTEE) • Missed an opportunity to become CIO (PTEE) • Is motivated to manage and supervise businesses/processes (IMR) • Is motivated to manage people (IMR) • Is a good fit with management roles (IMR) • Has good people management skills (SAE) 	<ul style="list-style-type: none"> • Seeks titles and designations (VCE) • Seeks power and authority (VCE) • Influences people (VCE) • Is not motivated by recognition or status (IMR) • Is a poor mentor/coach (SAE)
2. Enjoys creative/innovative activities	<ul style="list-style-type: none"> • Is talented at music composition (EEE) • Likes to work in a creative environment (PTEE) • Looks for new ways to alleviate poverty (PTEE) • Creates value/solving problems (VCE) • Is motivated by creative activities (IMR) • Is motivated by activities that allow experimental thinking (IMR) • Is a good fit with research roles (IMR) • Is a good fit with creative writing/music composition (IMR) 	

Life Theme	Supporting Evidence	Contradictory Evidence
3. Believes in honest and fair business and personal conduct	<ul style="list-style-type: none"> Operates with integrity and fairness (VCE) Exhibits integrity and strength of character (SAE) Leads by example (SAE) 	
4. Enjoys living in Colorado (self and family)	<ul style="list-style-type: none"> Is living in Colorado (PTEE) Is motivated by comfort and happiness of family (VCE) Makes short-term sacrifices to be able to live in Colorado (VTE) Prefers location (LPE) 	

For definitions of the acronyms used in this table, see Chapter 3.

EXAMPLE 2: CAREER IMPLICATIONS

Career Implication	Supporting Evidence (life themes that support the implication)	Contradictory Evidence (life themes that contradict the implication)
1. People management is a good fit for me.	PTEE, IMR, and SAE all support.	VCE indicates interest in management is not power driven, but this doesn't contradict. SAE indicates I should look into mentor/coach training/opportunities to enhance skillset.
2. My role needs to provide me with an appropriate level of autonomy with regard to innovation and risk taking.	EEE, PTEE, VCE, and IMR all indicate I have skills/strength in creative/innovative activities.	

Career Implication	Supporting Evidence (life themes that support the implication)	Contradictory Evidence (life themes that contra- dict the implication)
3. Organizational culture needs to reflect/support my values in terms of ethics and fairness.	VCE and SAE support this—I should perform thorough work environment/organizational research to best ensure a fit between my values and a new organization.	
4. My role needs to be flexible enough that I can have ample work/life balance.	VCE shows I'm motivated by comfort and happiness of my family.	
5. I want to be able to further my career while staying in the state of Colorado.	PTEE, VTE, and LPE support this need/goal.	

For definitions of the acronyms used in this table, see Chapter 3.

COMPLETED EXAMPLES FROM AWARENESS OF ENVIRONMENT

EXAMPLE 1: EVALUATING CORPORATE CULTURES

Company*	Culture Summary	Danger Signals	Why/Why Not a Fit?
XYZ Investments	<ul style="list-style-type: none"> • Top-down/hierarchical management style • Low tolerance for risk • Limited appetite for innovation in technology (social media guidelines still include “MySpace” references) 	<ul style="list-style-type: none"> • Limited growth opportunity (perceived) • Aging work force with recent difficulty retaining new (younger) staff 	<ul style="list-style-type: none"> • Not a good long-term fit • I perceive limited growth/development potential unless major firm changes occur • My manager isn’t always receptive to my feedback; I don’t perceive changes are likely to occur soon
ABC Investments	<ul style="list-style-type: none"> • New start-up with young work force • Emphasis on work/life balance (remote work, compressed schedule options) • Team-based compensation program 	<ul style="list-style-type: none"> • Lean work force – how quickly can it grow/will it sustain (or be subsumed)? • Will team-based compensation conflict with my personal standards for accountability/performance? 	<ul style="list-style-type: none"> • Potentially a fit • Can I tolerate ambiguity in terms of company life cycle? • Can you really have an effective work/life balance program with so few staff (how quickly can/will it grow)?

Company*	Culture Summary	Danger Signals	Why/Why Not a Fit?
123 Capital Management	<ul style="list-style-type: none"> • Mid-sized, established firm • Mentoring program is emphasized (senior staff assigned to junior staff members) • Results-only work environment (ROWE) 	<ul style="list-style-type: none"> • Has the company been too quick to move to ROWE or something similar to attract younger staff? • Do they have a long-term plan/strategy for evolution of the culture? 	<ul style="list-style-type: none"> • Potentially a good fit • Features stability (which I value) but also open to/emphasizes change • Mentoring program could be a great opportunity
Global Investment Management	<ul style="list-style-type: none"> • Large, established firm • Emphasis on face-to-face (internal staff and clients) • Innovation and technology are highly valued 	<ul style="list-style-type: none"> • Will face-to-face emphasis result in stringent work schedule rules? 	<ul style="list-style-type: none"> • Potentially a good fit • Features stability and emphasis on innovation/technology (which I value)

**Please note that the company names and information provided in the example above are fictional and intended solely for educational purposes.*

EXAMPLE 2: CLARIFYING YOUR PREFERENCES IN MANAGERS

Identify the main traits of a manager that will bring out the best in you.

- Willing to admit mistakes
- Provides candid and constructive feedback in a way that makes it easy for me to want to improve
- Interested in and encourages my development
- Stands up for and appreciates me/my work
- Knows how to handle his/her own personal frustrations

- Actively listens to me and seeks to understand my point of view
- Asks for my ideas
- Meets his/her commitments and practices what he or she says is important
- Gets the facts before making judgments or taking action

Identify the personal values you will find desirable in your prospective manager.

- His/her values are compatible with mine/allows us to work well together
- Genuinely cares about me as a person (is “human”)
- Gives me the space/autonomy I need to do my work (doesn’t micromanage)
- Meets his/her commitments and practices what he or she says is important
- Trustworthy
- Humility
- Is humorous/appreciates humor and knows how to inject fun into work

Develop five (or more) questions that you would ask a prospective manager during the interview process to determine if he or she possesses the management style and values you are looking for.

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1. How would you characterize your management/leadership style?
 2. When and how do you prefer to communicate feedback to your subordinates?
 3. What are your thoughts on performance reviews?
 4. How do you prefer for your reports to communicate with you?
 5. What are your basic expectations of your direct reports?
 6. How does your team celebrate victories and recover from setbacks?
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