



Work Life Planner





WORK LIFE PLANNING AND MANAGEMENT

A Three Factor Model

1. **Work** – What work requires the skills and personal qualities that I enjoy using?

- My Talents
- Past Work Achievements

2. **Work Environment** – What industries and occupations place importance on the values I think are important and the talents that I have to offer? Which type of leaders complement my favourite roles? .e.g. if your favourite role is to be a 'Responsible Contributor' then you will complement a 'Clear Confident Leader'.

- Values
- My Favourite Roles
- Repeated 'Contexts' in Past Work Achievements

3. **Lifestyle** – What standard of living do I want? What hours do I want to work? Where?

- Values
- Repeated 'Contexts' in Past Work Achievements

Four Stages of Work Life Planning and Management

1. **Self-Assessment** - Where I am now?

2. **Visioning & Validating** - Where do I want to be?

3. **Planning** - How do I get there?

4. **Renewing** - How do I stay on track?



DEFINING YOUR VALUES

One way of viewing your values is to consider them as the way you want to consistently feel in your life.

For example, if a person was asked the question, How do you want to feel consistently in your life?, and they answered, 'Respected', then it is likely one of their values is Respect.

Instructions

1. Ask yourself, *How do you want to feel consistently in your life?* Note your answers in the table below.
2. Rank order your *top six feelings* that are essential to you in your life, where '1' is your top feeling and '6' is the relatively least important feeling of your top six feelings.
3. Translate each of these feelings into a value that is important to you. For example, if you want to feel consistently loved in your life, then Love is one of your top six values, or if you want to feel consistently like you are achieving, then Achievement is one of your top six values.

Way I want to Consistently Feeling in my Life	Top Six Rank Order	My Top Six Values
<i>e.g. I want to feel respected.</i>		<i>Respect</i>



5-10 PAST ACCOMPLISHMENTS

Instructions

- Recall 5-10 Accomplishments you are proud of achieving (work and non-work, big or small). Note a heading for each accomplishment in the space provided below. e.g. My HSC mark.
- Note the context, actions, results, skills, personal qualities and roles that you used to achieve each accomplishment. Identify the specific skills and personal qualities that you used by using the lists of Skills and Personal Qualities shown on pages 17 and 18. To name the Roles you were in refer to pages 19-20.
- Use a highlighter pen to identify the context, actions, results, skills, personal qualities, thoughts and feelings you used repeatedly across your accomplishments.
- Circle the context, actions, results, skills, qualities, thoughts and feelings you actually enjoyed using. The repeated 'Contexts' are your preferred Work Environments and the repeated Skills and Personal Qualities are your Talents. The Thoughts and Feeling you repeatedly used are useful strategies you can use to take on your next work life challenges.

1. Accomplishment

Context, Actions, Results	Skills Used (see list page 17)	Qualities Used (see list page 18)	Roles (see list page 19-20)



2. Accomplishment

Context, Actions, Results	Skills Used (see list page 17)	Qualities Used (see list page 18)	Roles (see list page 19-20)

3. Accomplishment

Context, Actions, Results	Skills Used (see list page 17)	Qualities Used (see list page 18)	Roles (see list page 19-20)



4. Accomplishment

Context, Actions, Results	Skills Used (see list page 17)	Qualities Used (see list page 18)	Roles (see list page 19-20)

5. Accomplishment

Context, Actions, Results	Skills Used (see list page 17)	Qualities Used (see list page 18)	Roles (see list page 19-20)



6. Accomplishment

Context, Actions, Results	Skills Used (see list page 17)	Qualities Used (see list page 18)	Roles (see list page 19-20)

7. Accomplishment

Context, Actions, Results	Skills Used (see list page 17)	Qualities Used (see list page 18)	Roles (see list page 19-20)



8. Accomplishment

Context, Actions, Results	Skills Used (see list page 17)	Qualities Used (see list page 18)	Roles (see list page 19-20)

9. Accomplishment

Context, Actions, Results	Skills Used (see list page 17)	Qualities Used (see list page 18)	Roles (see list page 19-20)



10. Accomplishment

Context, Actions, Results	Skills Used (see list page 17)	Qualities Used (see list page 18)	Roles (see list page 19-20)



WORK MARKETING PHONE SCRIPTS

What is your Purpose - Write your purpose for phoning below

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Tips

- Knowing your purpose for phoning enables you to lead the conversation.
- Be their equal. Remember all your Achievements, Skills and Qualities. You do have something to offer!
- Be present to the person's tone of voice and words. Enter their world.
- Reflect back their world. Build rapport rapidly.
- Rote learn a one sentence attention grabbing introduction. Finish with an open question to invite conversation.

e.g. I was wondering if you were open to talking about pressures on profits and the results we've been getting with our clients. Is increasing profits important to you and your business?

- Know answers to common questions.
 - What do you do?
 - Who have you done that with?

Career Information Interviews

4 Questions

- How did you get to where you are now?
- What do you like about the being a (occupation)?
- What do you dislike about being a (occupation)?
- Who else can I speak to?
- Rote learn these Career Information Interview questions.



RESUMES

Three Types

1. **Chronological** – lists by year and month the positions held in each organisation and the achievements attained in each position. Well suited for individuals with an established career history who are seeking opportunities in similar occupations/industries.
2. **Skills Based** – lists by skills the achievements made in different positions and organisations. Suited to individuals wanting to move into a new occupation/industry by highlighting their transferable skills.
3. **Combined** – lists achievements by both positions held and skills acquired. Suited to individuals with established careers seeking to move into new occupations/industries.

Tips

- Up to four pages comprising:
 - Personal details – name and contact details (exclude date of birth).
 - List achievements under either positions held or skills learnt.
 - Qualifications attained and any relevant short courses.
 - Professional association memberships and positions held (omit personal interests).
- Describe achievements starting with an action verb and quantify the results wherever possible. Bullet point each achievement description (maximum two sentences per achievement).
- State that 'Referees are available upon request'. Keep control of briefing your referees.



YOUR WORKLIFE SELF ASSESSMENT SUMMARY

Name:

Date:

My Talents – Skills I Enjoy Using

My Values

My Personal Qualities

My Favourite Roles



WORKLIFE VISION

Lifestyle

Picture the lifestyle you realistically want to achieve. Income, working hours, leisure activities etc.

Work Environment

What is important to you and the people you are working for? Where are you working? What are the characteristics of the work environment that you like?

Work & Talents

What are you doing that is valued by you and other people? What type of capabilities and qualities do these activities require you to use?

Roles

What thoughts do you have about yourself? How are you feeling towards yourself, what do you do, the people and your situation?

Estimate the year/month you want to achieve your worklife vision.

Worklife Vision Date:/.....
Month Year



Half-Way Milestone

What year/month is halfway between your Worklife Vision Date (see page 13) and the current date. Note your Half-Way Milestone Date below.

Half Way Milestone Date/.....
Month Year

Work & Talents

To achieve your Worklife Vision, what activities and capabilities will you need to have mastered by your Half Way Milestone Date.

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Roles

To have mastered those activities and capabilities, what thoughts will be most helpful to yourself? How will those thoughts make you feel?

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Work Environment

Where will you be using your capabilities? Who are you with in this scenario? What is important to you and these people?

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Lifestyle

Picture the lifestyle you realistically will be living then. Income, working hours, leisure activities etc.

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12 Month Milestone

Work & Talents

To achieve your Half-Way Milestone, what activities and capabilities will you need to have mastered in 12 months time?

Roles

To have mastered those activities and capabilities, what thoughts will be most helpful to yourself? How will those thoughts make you feel?

Work Environment

Where will you be using your capabilities? Who are you with in this scenario? What is important to you and these people?

Lifestyle

Picture the lifestyle you realistically will be living then. Income, working hours, leisure activities etc.



The Future is NOW!

Work & Talents

To achieve your 12 month milestones, what activities and capabilities do you want to take now?

Work Environment

What capabilities will these activities require you to develop?

Roles

To have mastered those activities and capabilities, what thoughts will be most helpful to yourself? How will those thoughts make you feel?



LIST OF SKILLS

Accounting	Heal	Programme
Administer	Help others	Project Management
Advertise	Implementation	Public Speaking
Allocate	Improvisation	Purchase
Analyse	Influence	Revising
Assess	Insight	Scheduling
Audit	Invent	Select
Authorize	IT Technical Skills	Self Promote
Budget	Leadership	Sell
Build	Liaise	Simplifying
Build relationships	License	Sort
Buy	Listen	Staff Planning
Captain	Maintain	Strategic Planning
Chair (a meeting)	Make Decisions	Summarising
Coach	Make Judgements	Supervising
Commercialise	Manage	Synthesise
Communication	Market	Team Build
Contribute	Model	Tracking
Consolidating	Monitor	Trading
Control	Motivate	Training
Copywriting	Negotiate	Translating
Counsel	Network	Verbal Communication
Customer Service	Operational Planning	Visualise
Define	Organising	Warehouse
Delegate	Perform	Workforce Planning
Design	Performance Manage	Written Communication
Develop	Planning	
Diagnose	Present	
Direct	Pricing	
Distribute	Problem Solve	
Drafting	Procure	
Edit	Process	
Empathise	Production Management	
Engineer	Policy Writing	
Estimate	Procedure Writing	
Evaluate	Quality Assure	
Facilitate	Record	
Finance	Recruit	
Follow up	Regulate	
Forecast	Remuneration	
Fund raise	Report	
Give Feedback	Represent	
Give Praise	Research	
Graphic Design	Resource Management	



LIST OF PERSONAL QUALITIES

Able	Imaginative
Accommodating	Incisive
Adaptable	Industrious
Ambitious	Insightful
Analytical	Inspiring
Anxious	Intellectual
Alert	Intelligent
Assertive	Intuitive
Balanced	Kind
Brave	Masterful
Bold	Modest
Calm	Level Headed
Careful	Loving
Caring	Loyal
Communicative	Observant
Compassionate	Open
Competent	Open Minded
Compliant	Optimistic
Confident	Orderly
Conscientious	Organised
Cooperative	Outgoing
Courageous	Patient
Creative	Perceptive
Decisive	Precise
Dedicated	Persistent
Detailed	Persuasive
Determined	Positive
Diligent	Punctual
Diplomatic	Quiet
Disciplined	Responsible
Discreet	Resourceful
Driven	Results Orientated
Easygoing	Self-Disciplined
Efficient	Sensitive
Empathetic	Sincere
Enthusiastic	Supportive
Energetic	Sympathetic
Fair	Strategic
Fast	Strong
Firm	Structured
Flexible	Tenacious
Focused	Thoughtful
Forgiving	Thorough
Forthright	Tolerate
Friendly	Tough
Generous	Trusting
Graceful	Trustworthy
Hardworking	Warm
Helpful	Wise
Honest	Willing
Humorous	



LIST OF ROLES

<p>A</p> <p>Abuser Accommodator Achiever Actor Addict Adult Adventurer Advocate Alchemist Ally Analyst Appreciator Acquaintance Arbitrator Architect Artist Aspirer Assertor Attacker Author Autocrat Avoider</p> <p>B</p> <p>Beggar Benefactor</p> <p>Bishop Blamer Buddy Builder Bully Bureaucrat</p> <p>C</p> <p>Captain Caregiver Child Clairvoyant Clown Coach Comedian Commentator Commander Companion Competitor Complainer</p>	<p>Complier Confidante Conniver Champion Creator Crew Criminal Critic Cynic</p> <p>D</p> <p>Decision maker Debtor Defender Defeated Demon Designer Deviant Director Discloser Dreamer</p> <p>E</p> <p>Educator Elite Encourager Enemy Entrepreneur Enthusiast Escapee Experimenter Expert Explainer Exploiter Explorer Extrovert</p> <p>F</p> <p>Facilitator Fanatic Fighter Fixer Follower Forgiver Friend Fundamentalist</p>	<p>G</p> <p>Glutton Goal Setter God Gossiper Griever Grudge Keeper Guardian</p> <p>H</p> <p>Healer Hedonist Heir Helper Hero Holder Host</p> <p>I</p> <p>Impersonator Influencer Inquirer Inspirer Instructor Interrogator Intimidator Introvert Investigator</p> <p>J</p> <p>Juggler Jester Joker</p> <p>K</p> <p>King</p> <p>L</p> <p>Leader Liar Listener Loner Lover</p>
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LIST OF ROLES

M Machine Magician Manipulator Martyr Masochist Masquerader Mediator Member Mentor Mimic Motivator	R Rebel Relationship Builder Repairer Rescuer Resenter Revivor Rogue Romantic Role Model Runt S Sage Saviour Schemer Scribe Second in Command Seducer Seeker Self Believer Self Discloser Servant Shaker Shocker Shooter Show-Off Slave SNAG Snob Softie Spastic Speaker Spirit Sponge Spy Stabilizer Stakeholder Story Teller Struggler Student Supporter Survivor Sympathizer Synthesiser	T Tantalizer Teacher Technician Theorist Thriller Thrillseeker Timekeeper Tormentor Traditionalist Trainer Translator Transporter Traveller Trickster Truth Speaker U Underminer Uplifter User V Vacillator Vacuum Cleaner Victim Villain Visionary W Waif Wanderer Warrior Widow Witch Withdrawer Wizard Worker Worrier Writer Y Yeamer Yielder Z Zealot
N Neighbour Networker		
O Observer Operator Opponent Oppressor Optimist Organiser Oracle		
P Parent Patient Peasant Pedant Perfectionist Pessimist Philosopher Planner Player Pleaser Predator Predictor Presenter Problem Solver Producer Prosecutor		
Q Queen Questioner Quitter		