



THE NEXT STEPS CAREER WORKBOOK FOR SENIOR EXECUTIVES

As an experienced social sector leader and manager, you have probably discovered that several key factors go into your level of job satisfaction or dissatisfaction and that these factors may also correlate with your success in performing any given role. Considering these key factors before making your next move can help you find the right next step on your career journey.

This workbook presents a simple process that will be useful to you in direct proportion to the degree you take the time to dive deeply into each of the tools. Therefore, we recommend that you make time to think about each of these factors and to work through each of the tools after you have found time to relax, take a break, and de-stress a bit. Doing it over a long weekend or during a vacation, after several days off work, is ideal. Your true self and your deeper aspirations will emerge if you are able to gain a bit of a “quiet mind” rather than from trying to “solve” this as yet another work problem or task to be dispensed with on a deadline.

Unlike so much of your work life, this process is about you – what you want, what you are good at, how you can best contribute to the causes you care most deeply about. The only end user for this material is you, and perhaps a La Piana coach you are working with, if you choose to share it. We have organized this process by moving you through several tools. Each asks you to consider and reflect upon yourself. We recommend you pursue these tools in the order presented, as they build on one another, but you should complete the Workbook on your own timeline. You can print out the Workbook or print additional pages for any specific tools you need more space to complete.

We hope this Workbook helps you gain clarity as you contemplate next steps on your journey.

TOOL 1: THE LIFE EVENTS CHART



Use the chart below to record significant life events. To begin, think back to your earliest memory. Try to recall how you felt when you experienced it. What is that memory? How old were you? Where were you? Who else was there? What impact has it had on you? After recording that first memory in the chart below, move forward chronologically, listing other significant life events up to the present. It should take about an hour to complete this exercise. Go slowly, trying to remember each significant event and to recall its importance to you.

Event	Age	Impact

TOOL 1: THE LIFE EVENTS CHART



Once you have completed the chart, go back over the Impacts column looking for any patterns. What did you learn? Record your top takeaways here.

Takeaways:

TOOL 2: REVIEWING THE LIFE EVENTS CHART



Reflecting on the material you entered into The Life Events Chart, respond to the following questions.

What or who influenced the decisions you have made at different points in your life?

What themes or patterns in your career or life to date can you identify?

What do these themes or patterns tell you?

How much control do you feel you have had over your life?

Do your experiences tell you anything about your personal qualities, attitudes or ambitions? If so, what?

What has helped you most during the difficult times in your life?

What sort of things have motivated or demotivated you?

TOOL 3: WORK - THE ACTIVITIES YOU ENJOY



Thinking about work, what specific activities do you do best and what specific activities do you most enjoy performing? What activities do you avoid, procrastinate on, or just not do very well?

Activities you do best and enjoy most	Activities you avoid or struggle with

Reflecting on those activities listed in each category above, are there themes or types of activities that emerge? Summarize below the following:

I am **most successful and happiest at work when I am doing:**

I am **least successful and unhappiest at work when I am doing:**

TOOL 4: PLAYING A ROLE



What work roles (or positions) do you feel most satisfied when occupying. Indicate with an X as many roles as you feel really fulfill you, play to your strengths, or bring you daily joy. Indicate how many years total over your career you have spent in each role. Feel free to add additional roles not specified here and to indicate roles you think you might enjoy but have not yet occupied.

Role	Years in this role	Most satisfying	Plays to my strengths	Most Enjoyable	Notes
CEO					
C-Suite non-CEO (specify)					
Middle Manager					
Front Line Worker					
Consultant/ Advisor					
Other					
Other					
Other					

Reflecting on this retrospective of your career to date, what do you see? Have you spent most of your time in roles you find most satisfying? If not, why not?

TOOL 5: SETTING - WHERE YOU DO THE WORK



The work you perform can be accomplished in many different settings. You may have already worked in several. First indicate the number of years you have worked within any of the settings from the list below. Next, indicate any of these settings you feel you would want to be part of (or not) in the future by writing *Yes* or *No*. Then offer a simple explanation as to why you gave that answer.

Setting	Years?	Yes/No	Why?
Federal Government			
State or Local Government			
Elected Official			
Elected Official's Staff			
Nonprofit Operating Organization			
Philanthropic Foundation			
Think Tank			
Academia			
Corporation			
Labor Union			
Professional Services Firm			
Individual/Solo			
Other			

TOOL 5: SETTING - WHERE YOU DO THE WORK



Look for patterns to the reasons some settings appeal to you while others turn you off. Are there settings you have worked in before that you would never consider again? Why?

TOOL 6: REPORTING - BOSS OR NO BOSS?



In the box below, first name and then describe the best boss you have ever had. What did they do for you? How did they challenge you? Think deeply about this relationship and describe it in as much detail as you can. Now describe your worst boss, and again what made them so bad for you?

My Best Boss	My Worst Boss
Who was it? Organization?	Who was it? Organization?
Why?	Why?

With these models of good/bad bosses in mind, in your next job, do you want the mentorship and direction that comes with having a boss, assuming you found one who represented your best model? Or do you want to be the boss? Or do you want to be outside of a hierarchy/organization? Why?

TOOL 7: THE IDEAL JOB



Think about each job you have held to date. Describe the things you liked and the things you didn't like about each job. Be inclusive. Record things that were exciting, boring, rewarding, or irritating. Use enough detail to create a picture of what each job meant to you.

Job	 Liked	 Disliked

TOOL 7: THE IDEAL JOB



Now go back and look at all the “liked” and “disliked” factors. Rate each for its importance to you on a scale of 1-5 where 1 is unimportant and 5 is very important. Think about why these factors are so important to you.

Finally, describe several possible future jobs that would have all the “liked” factors and few of the “disliked.”

A large, empty rectangular area with a light gray background, intended for writing responses to the instructions above. It is framed by a thick orange border on the right and bottom sides.

TOOL 8: PUTTING IT ALL TOGETHER



This short Workbook should help you to think deeply about what you want and need from your next position. Review each of the tools you have completed, then answer these questions:

1. What kinds of work (activities) do I find most exciting on a day-to-day basis?

Blank response area for question 1.

2. What kinds of work (activities) do I find most satisfying over the long term?

Blank response area for question 2.

3. What roles am I best at performing?

Blank response area for question 3.

4. What roles should I avoid?

Blank response area for question 4.

TOOL 8: PUTTING IT ALL TOGETHER



This short Workbook should help you to think deeply about what you want and need from your next position. Review each of the tools you have completed, then answer these questions:

5. What are my feelings about organizations? Do I want to join one, lead one, or work outside of one?

6. What kinds of roles and settings offer the greatest opportunity for the excitement and satisfaction I seek?

7. What have I learned about myself from this process? What are some concrete next steps I will take to explore my options?



We hope this Workbook has been helpful to your career exploration! It may be most useful to complete it, set it aside for a few days, then return to it and see if your answers still make sense to you. Hopefully, a picture of your next career move will begin to emerge as you work through this process.

ACKNOWLEDGEMENTS

Most of the tools and processes presented in this Workbook are original to La Piana Consulting as is the idea behind this Workbook – helping senior leaders make next-step career decisions. However, some tools and concepts are adapted from leading field resources, whose contributions to the topic we gratefully acknowledge. These include:

- 50 Top Tools for Coaching, by Gillian Jones and Ro Gorell, Kogan Press, 2015
- Executive Coaching: Practices and Perspectives by Catherine Fitzgerald and Jennifer Garvey Berger, Davies-Black Publishing, 2002
- The Leadership Challenge, by James M. Kouzes and Barry Z. Posner, Jossey-Bass Publishers, 2002.

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