

## Introduction

CAI views associate development as vital to its own success and that of its associates. Associate development is helping people identify and move toward their career goals while making the best use of their abilities. CAI's rapid growth and continuous change have enabled associates to take advantage of a wide variety of development opportunities. These opportunities include training for new skills, changing career paths, additional responsibilities that are more challenging and relocating to different accounts.

This guide is a self-assessment tool that will assist you with the career planning process. The most important factors in this process are that you take ownership of the plan and that you are committed to its success. You are responsible for yourself and your future. You own your career. Your manager can provide help and advice, but only if you know what direction you want to take. This guide will help you assess your values, interests, talents, skills, strengths and weaknesses. Once you have a clearer understanding of who you are and what you're good at, you will be able to develop meaningful goals.

Planning your goals takes time, effort and thought. It requires an honest and realistic assessment of who you are. It also requires that you are open and honest when discussing your goals and self-assessment with your manager. A balanced plan will include goals related to your current position as well as future responsibilities. It is important to remember that a development plan does not guarantee you a better position, but it will help you clarify your work objectives and define a strategy that will prepare you for new opportunities. As you put this plan together be sure to determine how much time and effort you are able to devote to your development, and remember, you are responsible for your own career plan.

## Current Position

**Title**

**Responsibilities**

**Things I like about my position**

**Things I dislike about my position**

## Guiding Values

Your guiding values help to define who you are as a person. You established these values while a child as a result of 1) the influence of significant people in your life (e.g. parents, teacher) and 2) how you were affected by key life events. As an adult you evaluate circumstances and events in light of these guiding values. It is important to understand what your values are as they impact your ability to achieve your goals. Career plans that are not consistent with your guiding values have little chance of success.

**Complete the following exercise by ranking your guiding values according to the chart below.**

- 1. Unimportant**
- 2. Slightly important**
- 3. Average importance**
- 4. Above average importance**
- 5. Extremely important**

*The blank lines at the end of the table are for any Guiding values that are important to you that may not already be included.*

Ranking	Guiding Value	Description
	<b>Health</b>	Maintaining my physical health through exercise and diet
	<b>Moral/Ethical Satisfaction</b>	Having my life in order with a set of standards I believe in
	<b>Prestige</b>	Becoming well known, obtaining recognition, awards or high social status amongst my family, friends, and community (including co-workers)
	<b>Relationship with Family</b>	Developing and maintaining strong relationships with parents, siblings, and relatives
	<b>Relationship with Spouse</b>	Developing and maintaining strong relationships with my husband/wife
	<b>Relationship with Children</b>	Being a good parent to my children, developing and maintaining strong relationships with my children
	<b>Relationship with Friends</b>	Developing close friendships with people I meet in life
	<b>My Faith</b>	Developing and maintaining the spiritual aspect of my life, taking part in my local church, synagogue or temple
	<b>Serving Your Community</b>	Making the community and the world you live in a better place
	<b>Wealth</b>	Earning a great deal of money, building up a large financial estate
	<b>Authority</b>	Being responsible for leading the activities of others
	<b>Time Freedom</b>	Being free to plan and manage my own time schedule in work, setting my own hours
	<b>Independence</b>	Having the opportunity for freedom of thought and action, being my own boss
	<b>Meaningful Work</b>	Believing the work I do has purpose
	<b>Education</b>	Acquiring new knowledge and understanding for personal satisfaction
	<b>Security</b>	Achieving a secure and stable position in my work and financial situations
	<b>Self-realization</b>	Achieving my creative and innovative potential
	<b>Variety</b>	Pursuing a number of different activities, having my responsibilities change frequently
	<b>Creativity</b>	Creating new programs and instituting new ideas
	<b>Advancement</b>	Working hard and move ahead in my organization
	<b>Stability</b>	Living in an environment where things have their place and are not often changed
	<b>Duty</b>	Dedicating myself to the pursuit of values, ideas and principles that serve mankind
	<b>Pleasure</b>	Enjoying life, having the "good things" in life

Ranking	Guiding Value	Description

Once you have rated your guiding values using the 1 to 5 scale, identify your top 10 values and compare them to each other, then prioritize these values from 1 to 10 with 1 being your most important value.

**My Guiding Values**

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

**Reflect upon your guiding values and your current position.**

How is your current position compatible with your guiding values? (e.g. I value variety in my work. In my role as a Solution Center Developer, I regularly have the opportunity to work on a variety of projects with many different customers)

How is your current position incompatible with your guiding values? (e.g. I value wealth, but I'm working as a Social Worker in a children's agency)

## Position Profile and Skill/Traits Inventory

Skills/Traits you use in your current position can be defined in three ways:

### Job Content Skills

These are the basic skills required to perform the responsibilities of a position. Job content skills are assets only if you stay in a position or career that uses them. They typically become outdated over time and therefore require updating, or replacement.

#### Examples

Use of Office Systems  
Programming in a Language  
Coding  
Testing  
Assembling  
Selling

Repairing  
Coordinating  
Knowledge-Based Skills  
■ Desktop Services  
■ Human Resources  
■ IT

### Transferable Skills

These skills help you to excel in your position. They are assets in any position and tend to become more important as your responsibilities increases.

#### Examples

Delegating Responsibilities  
Managing Projects  
Managing Time  
Planning  
Counseling  
Organizing  
Negotiating

### Self Management Traits

These traits help you adapt to your surroundings. They often determine our ability to function amidst uncertainty. As a result, they are often called adaptive skills. These skills are not always necessary to perform a task, but enhance your performance. Like transferable skills, they become more important as your responsibilities increase. They are lifetime assets and rarely become outdated.

#### Examples

Assertiveness  
Decisiveness  
Orderliness  
Flexibility  
Self-control  
Initiative  
Resourcefulness

## Evaluating Job Content Skills

Use the space below to list the five most important job content skills in your current position. Mark your skill level as High (H), Medium (M), or Low (L) and mark those you feel need improvement with an 'x'.

Job Content Skills	Skill Level (H,M,L)	Need Improvement?
1.		
2.		
3.		
4.		
5.		

### Reflect on your current position.

Do you have the necessary job content skills to be successful in your position?

**Identify and prioritize the job content skills that you would most like to improve in the next year.**

1.
2.
3.
4.

Would your manager and peers agree with your assessment?

## Evaluating Transferable Skills

Check the transferable skills that are required to be successful in your current position. Then rate your skill level as High (H), Medium (M), or Low (L) and mark those you feel need improvement with an 'x'.

*The blank lines at the end of the table are for any transferable skills that are important to your work that are not included in the list.*

<b>Transferable Skill</b>	<b>Required?</b>	<b>Skill Level (H, M, L)</b>	<b>Need Improvement?</b>
Building Relationships			
Counseling			
Creating, Inventing			
Delegating			
Developing Processes			
Facilitating/Conducting Meeting			
Leading People			
Listening			
Managing Finances/Budgets			
Managing Projects			
Managing Time			
Mentoring			
Motivating Others			
Negotiating			
Organizing			
Planning			
Presenting to Groups			
Reading Comprehension			
Reading Speed			
Remembering			
Researching			
Solving Problems			
Thinking/Acting Intuitively			
Writing			

**Reflect upon your current position.**

Do you have the necessary transferable skills to be successful in your position?

**Identify and prioritize the transferable skills that you would most like to improve in the next year.**

1.
2.
3.
4.

Would your manager and peers agree with your assessment?

## Evaluating Self-Management Traits

Check the self-management traits that are required to be successful in your current position. Then rate your skill level as High (H), Medium (M), or Low (L) and check those you feel need improvement with an 'x'.

*The blank lines at the end of the table are for any self-management traits that are important to your work that are not included in the list.*

Self-Management Trait	Required?	Skill Level (H, M,L)	Need Improvement?
Adaptability			
Affability			
Assertiveness			
Attentiveness			
Candidness			
Courage, Risk-taking			
Creativity			
Decisiveness			
Detail-oriented			
Determination			
Diplomacy			
Empathy			
Enthusiasm			
Flexibility			
High Energy			
Initiative			
Intuitiveness			
Orderliness			
Patience			
Poise, Self-confidence			
Reliability, Dependability			
Resourcefulness			
Self-control			

### Reflect upon your current position.

Do you have the necessary self-management traits to be successful in your position?

**Identify and prioritize the self-management traits that you would most like to improve in the next year.**

1.
2.
3.
4.

Would your manager and peers agree with your assessment?

## Satisfaction

Your personal satisfaction with the events or activities in your life has a direct effect on your attitude and performance. Understanding your satisfaction levels is a crucial step in development planning.

Rate your satisfaction level in the areas below for the following categories  
1 is (Low) 10 is (High)

- Current Position
- Career Progress
- Personal Life

Then write two positive reasons why you rated it as high as you did, and two reasons preventing you from rating it higher on the scale.

<b>Current Position</b>	
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<b>Two Positive Influencers</b>	<b>Two Negative Influencers</b>
1.	1.
2.	2.

<b>Career Progress</b>	
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<b>Two Positive Influencers</b>	<b>Two Negative Influencers</b>
1.	1.
2.	2.

<b>Personal Life</b>	
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<b>Two Positive Influencers</b>	<b>Two Negative Influencers</b>
1.	1.
2.	2.

Is your level of satisfaction with your current position positively or negatively impacting your performance and overall effectiveness?

If it's negatively impacting your effectiveness, what steps do you need to take to rectify this situation?

Is your level of satisfaction with career progress positively or negatively impacting your performance and overall effectiveness?

If it's negatively impacting your effectiveness, what steps do you need to take to rectify this situation?

## Defining A Better Position

### Current Position

As part of the goal setting and planning process, identify ways to improve your current position.

**Check the three choices that best define your meaning of a better position from the choices below. Prioritize your three choices. Next, write two reasons why each of the three choices is important to you.**

*The blank lines at the end of the table are for any self-management traits that are important to your work that are not included in the list.*

Most Important	Definitions of Better Position	Two Reasons Why Important
	<b>Applying Current Skills in a Different Area of the Business</b>	1. 2.
	<b>Being More Creative/Innovative</b>	1. 2.
	<b>Change in Career Path</b>	1. 2.
	<b>Higher Salary/Financial Rewards</b>	1. 2.
	<b>Learning New Skills/Improving Skills</b>	1. 2.

Most Important	Definitions of Better Position	Two Reasons Why Important
	<b>More Responsibility/Autonomy</b>	1. 2.
	<b>More Varied/Challenging Work</b>	1. 2.
	<b>Promotion/Higher Level</b>	1. 2.
		1. 2.
		1. 2.

**Future Position**

Identify the position or positions that you would be interested in assuming in the future.

Are your guiding values compatible with the desired future position?

What job content skills must you develop in order to perform this desired future position effectively?

What transferable skills?

What self-management traits?

## Goal Setting

You are now in a position to begin developing goals that are meaningful – goals that will help you succeed in your career at CAI

### “Current” Position Goals

<b>My “current” position goal(s) for the next year are ...</b>

**Evaluate the appropriateness of each goal by answering the following questions:**

1. Is the goal specific?
  2. Is the goal measurable?
  3. Is the goal challenging?
  4. Is the goal realistic?
  5. Is the goal valuable?
  6. Does the goal have a time-frame?
- Revise any “current” position goals that need to be revised.**

### “Future” Position Goals

<b>My “future” position goal(s) for the next year are ...</b>

**Evaluate the appropriateness of each goal by answering the following questions.**

1. Is the goal specific?
2. Is the goal measurable?
3. Is the goal challenging?
4. Is the goal realistic?
5. Is the goal valuable?
6. Does the goal have a time-frame?

**Revise any “future” position goals that need to be revised.**

**Now evaluate each goal’s compatibility with your Guiding Values.**

The questions below will assist you with identifying the types of questions that you need to ask yourself.

1. What is the cost of my career goals to my family and life in terms of time and finances?
2. How much support is my family willing to provide me as I pursue my career goals?
3. How persistent will I be in pursuing my career goals?
4. Will achievement of these goals be truly rewarding to me?
5. Is each goal compatible with my guiding values?