

# YOUR CAREER 101

A GUIDE TO MANAGING YOUR CAREER

(VERSION 1.0)

RICK BARON



# Your Career 101: A Guide to Managing Your Career

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## Forward

March, 2010

*Direction is what people hunger for when faced with loss. Financial, personal, and identity loss has become very common amidst this great recession with so many seeking a path in which to identify readily available and yet meaningful work. Unfortunately, the time for reflection often comes only when significant transitional times arrive in the form of unemployment or underemployment. This is when the reactive takes over and what should have been done previously; now becomes urgent.*

*Keeping this in mind, the following is an abbreviated version of career planning, job search, and interviewing methods that can be easily studied and quickly utilized. It would be wonderful for me to tell you that all of these ideas in this book were mine; but they weren't. They are the work of some highly intelligent practitioners and out of respect to them and their efforts I wish to respect their research and accomplishments. For this reason and the simple fact that the last thing you need when you're unemployed is to buy advice; this publication will and always remain free and available to anyone who requests it. I ask that those who use and share these materials extend the same respect to those who have crafted these thoughts for all of our benefit.*

***I wish you deep reflection, thorough planning, enthusiastic action, and rewarding work.***

***Rick***

## About Rick

### Rick Baron, MS, SPHR, CPC

Human Resources & Career Strategist

Rick Baron is an, Advisor, Teacher, Writer, and Career Strategist, specializing in Strategic Human Resources Management & Recruiting that helps organizations realize their highest objectives through the efforts of its members.

Rick is currently the Human Resources Manager for Harmar Mobility, a durable medical device manufacturer in Sarasota, Florida. Formerly, Rick has been the Strategic Leader in Human Resources for PGT Industries, General Manager of Human Resources for Sarasota County Government, and Corporate Employment Manager for GevityHR.

Rick's credentials include the designation of Senior Professional in Human Resources issued by the Society for Human Resources Management and Certified Personnel Consultant issued by the National Association of Personnel Services. He holds a Bachelors Degree in Human Resources Management from Columbia Southern University and a Masters in Business Administration from Warren National University. He is currently pursuing his doctorate in organizational leadership from Northcentral University.

Rick's community involvement includes being a member of the board of the Suncoast Workforce Board and Sarasota-Manatee Human Resources Association and chairs committees that promote HR certification and career development within the Human Resources field. Rick is an avid cavern diver, bonsai artist, and cook (ask him about his plank salmon) as well as an aspiring, but not nearly successful rock drummer and beat mixer. He's been married and has been a big fan of his wife Sue for almost twenty years and he is the father of Rebecca and Nicole who think he fires people for a living.

You can contact Rick at: [rick@rmbaron.net](mailto:rick@rmbaron.net) or through <http://www.rmbaron.net>

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## A Career Resource

In every job, career, or profession, certain qualities are necessary for success. Some of the most popular include (in alphabetical order):

- *Acting with Integrity*
- *Analysis*
- *Balance between personal life and work*
- *Building rapport*
- *Closing Sales*
- *Collaboration*
- *Composure*
- *Customer needs*
- *Customer service commitment*
- *Delegation*
- *Ethics and values*
- *Follow-up*
- *Hiring*
- *Informing*
- *Innovation*
- *Job training*
- *Listening*
- *Managing change*
- *Motivating*
- *Optimism*
- *Organizational knowledge*
- *Ownership*
- *Personal productivity*
- *Planning*
- *Problem solving*
- *Professionalism*
- *Recognizing and rewarding*
- *Risk taking*
- *Self-development*
- *Straightforwardness*
- *Taking a stand*
- *Technical/professional knowledge*
- *Written communication*
- *Adaptability*
- *Attention to Detail*
- *Being a quick study*
- *Business Acumen*
- *Coaching*
- *Competitor/Market Analysis*
- *Conflict resolution*
- *Customer prospecting*
- *Decisiveness*
- *Developing others*
- *Fairness*
- *Group facilitation*
- *Influencing*
- *Initiative*
- *Involving*
- *Judgment*
- *Managerial courage*
- *Managing vision and purpose*
- *Negotiating*
- *Oral communication*
- *Organizing*
- *Perseverance*
- *Personal standards*
- *Presentation skills*
- *Product knowledge*
- *Providing direction*
- *Resourcefulness*
- *Sales ability*
- *Sensitivity*
- *Strategic agility*
- *Teamwork*
- *Valuing diversity*

Like a roadmap on a trip, this guide is a tool to help you work your way toward your personal career plan. Consider the completion of each step a “rest stop” on your trip. Take time to reflect on what you’ve learned before moving forward. This reflection will make the time spent on this “journey” most valuable to you.

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Since the career management process is self-directed, you will get the best results by setting personal goals for completing the four steps. A recommended time allotment is listed below:

<u>Guilder Selection</u>	<u>Approximate Time</u>
Step 1 – Assess	1-2 hours
Step 2 – Explore	3+ hours
Step 3 – Analyze	1-2 hours
Step 4 – Act	2-3 hours

## You as an employee

Each of us brings our own unique values, preferences, skills, and dreams to the workplace, creating the diversity that contributes an organization's profitability and growth. But often times the average employee assumes that the development of careers and progression within any organization rests with the employer. This is not completely true. It's from a real partnership of mutual accountability that employees may develop and progress.

### *Career Management*

*The process of identifying career goals, establishing a plan for pursuing those goals, and taking personal responsibility for making those goals a reality.*

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## The Career Management Process

Managing your career requires four steps. Each step helps you answer a critical question for creating your career plan.

STEP 1:	Assess – Where am I Today?
STEP 2:	Explore – What are my Options?
STEP 3:	Analyze – Where do I want to go?
STEP 4:	Act – What do I need to do?

Career Management compliments the development planning process that you currently engage in with your supervisor, or often times on your own. Development planning is part of the performance management process and usually focuses on your current position as it relates to your next occupational goal.

The Career Management process in this guide enables you to take a broader approach. The guide leads you through the process by providing self-assessments, worksheets, and questions to help you gather and analyze information related to your interests, values, and success factors. Once you have that information, you are in the better position to explore, analyze and plan for opportunities.

You may find that your career needs change throughout your life. For example, a parent with children at home may find a part-time position best fits a need today, yet may plan to enter the workforce full-time once the children are in school. This example illustrates an opportunity to revisit the elements of the Career Management process and then readjust the plan to reflect your changing needs.

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## Overview of the Career Management Process

STEP	QUESTIONS	OUTCOMES
1: Assess	Where am I today? <ul style="list-style-type: none"><li>• What is important to me?</li><li>• What do I enjoy in a Job?</li><li>• What are my strengths and development needs?</li></ul>	A description of your personal wants and needs in a career.
2: Explore	What are my options? <ul style="list-style-type: none"><li>• How will business trends influence my future?</li><li>• How can I learn about opportunities?</li><li>• What career paths could I pursue?</li></ul>	A list of possible career options or opportunities for further consideration.
3: Analyze	Where do I want to go? <ul style="list-style-type: none"><li>• How do the opportunities I have identified match my needs?</li><li>• Which opportunity will I pursue?</li></ul>	A career opportunity that you will pursue.
4: Act	What do I need to do? <ul style="list-style-type: none"><li>• What is my goal?</li><li>• What actions do I need to take to achieve my goal?</li><li>• Is my plan realistic?</li><li>• Am I making appropriate progress toward my goal?</li></ul>	A plan for developing the success factors required by your desired opportunity.

## Your Competitive Advantage

Something that is absolutely critical concerning your career planning is to remain competitive. Realistically, just going to work and doing a good job is no longer enough. Every day you compete with your co-workers and those outside the organization for your next step. Therefore, it is critical that you continuously develop yourself to remain valuable and if appropriate move to the next step in your career.

*Just as it's important to have a career management plan and actions of achieving that plan, it's equally important to be flexible and open to making changes to that plan and actions. The Success factor Adaptability illustrated this critical behavior. As we look at different positions within the organization, we see that there are new opportunities that didn't exist five years ago, as well as decreasing opportunities in some areas. Flexibility and adaptability are skills that will enable you to respond to the changing environment and make the most of it!*

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## Step One: ASSESS – Where am I today?

Career Management begins with a realistic self-assessment that helps you answer three questions:

- *What is important to me?*
- *What do I enjoy in a Job?*
- *What are my success factor strengths and development needs?*

Once you have the answers to these questions, you'll be better able to describe the job features that meet your personal needs- and you'll be well on your way to successful career management.

*Choose a job you love, and you will never work again.*

*-Confucius*

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Step 1: ASSESS – Where Am I Today?

## What Is Important to Me?

We each have our own value system – the qualities that make life and work worthwhile. True job satisfaction can be achieved only when job features complement the values that are most important. This exercise will help you identify and prioritize your work values.

Of the values listed below, selection the five that are the most important to you at this point in your life. (You may add to this list.)

- |  |  |  |
|--|--|--|
| <input type="radio"/> Achievement            | <input type="radio"/> Independence                   | <input type="radio"/> Security               |
| <input type="radio"/> Authority/power        | <input type="radio"/> Influence                      | <input type="radio"/> Stability/tranquility  |
| <input type="radio"/> Competing/winning      | <input type="radio"/> Integrity                      | <input type="radio"/> Status/respect         |
| <input type="radio"/> Conformity             | <input type="radio"/> Knowledge/learning             | <input type="radio"/> Teamwork               |
| <input type="radio"/> Control                | <input type="radio"/> Leadership                     | <input type="radio"/> Variety/new challenges |
| <input type="radio"/> Creativity             | <input type="radio"/> Participation/belonging        | <input type="radio"/> Wealth                 |
| <input type="radio"/> Duty/loyalty           | <input type="radio"/> Personal development           |  |
| <input type="radio"/> Expertise/competence   | <input type="radio"/> Pressure                       |  |
| <input type="radio"/> Financial stability    | <input type="radio"/> Promotion/advancement          |  |
| <input type="radio"/> Friendship/cooperation | <input type="radio"/> Quality of life/family balance |  |
| <input type="radio"/> Fun/pleasure           | <input type="radio"/> Responsibility                 |  |
| <input type="radio"/> Helping others         | <input type="radio"/> Risk-taking                    |  |

List your top five values in priority order in the space below.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Quickly assess how many of your top five values can reasonably be attained in your present job. If four or five of your values are attainable, you are on the right track. If three or fewer are attainable, you should look for opportunities to make changes to your position.

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Step 1: ASSESS – Where am I Today?

## What do I enjoy in a job?

If you are working within an environment that complements your personal values, the characteristics of the job itself contribute to job satisfaction. This exercise will help clarify the characteristics that are important to your personal satisfaction needs and will help you determine what characteristics you would like to have in a job.

Of the job characteristics listed below, check the five that are most important to you (You may add to this list.)

- |   |  |
|---|--|
| <input type="radio"/> Structure/direction provided by others      | <input type="radio"/> Fast pace/tight deadlines/high pressure          |
| <input type="radio"/> Empowerment/self-direction                  | <input type="radio"/> Less urgent deadlines/less pressure              |
| <input type="radio"/> Flexible work hours/schedule                | <input type="radio"/> Performance critical or organization's success   |
| <input type="radio"/> Work at home/take work home                 | <input type="radio"/> Personal performance not critical to bottom line |
| <input type="radio"/> Job sharing                                 | <input type="radio"/> Work requires attention to detail                |
| <input type="radio"/> Absorbing/not 8 to 5 (Also known as "Flow") | <input type="radio"/> Work requires continual learning                 |
| <input type="radio"/> Manage people                               | <input type="radio"/> Work requires greater specialization             |
| <input type="radio"/> Work in a team                              | <input type="radio"/> Work in small groups or organization             |
| <input type="radio"/> Work mostly alone                           | <input type="radio"/> Work in large group or organization              |
| <input type="radio"/> Outdoors or field environment               | <input type="radio"/> No travel required                               |
| <input type="radio"/> Office environment                          | <input type="radio"/> Occasional travel                                |
| <input type="radio"/> Highly creative                             | <input type="radio"/> Extensive travel                                 |
| <input type="radio"/> Challenging/high risk                       | <input type="radio"/> Develop long-term work relationships             |
| <input type="radio"/> Secure/low risk                             | <input type="radio"/> Work with many different people                  |
| <input type="radio"/> Contact with customer or suppliers          | <input type="radio"/> Goals and procedures change frequently           |

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Step 1: ASSESS - Where am I Today?

## What are My Success Factor Strengths and Development Needs?

Now that you have considered what is important to you, the next task is to identify your strengths and development needs. You can do this by assessing your competence in the Success Factors. This information will help you focus your plan on opportunities that most closely align with your interests and competencies.

Part I. Directions:

Use the following scale to rate your competence on each of the Success Factors on page 12.

Rating	Rating Meaning	Explanation
1	Does Not Apply	Does not apply to me
	Limited Application	I do not demonstrate an understanding of consistent application of the basic concepts and skills associated with this Success Factor
2	Basic	I demonstrate an understanding of basic concepts and skills associated with the Success Factor as well as the ability to apply them with coaching and supervision.
3	Working Knowledge LOW	I demonstrate a lower working knowledge of concepts and skills, a moderate amount of hands-on experience, and the ability to coach others on this Success Factor.
4	Working Knowledge HIGH	I demonstrate a higher working knowledge of concepts and skills, a moderate amount of hands-on experience, and the ability to coach others on this Success Factor.
5	Advanced LOW	I demonstrate a lower advanced knowledge of concepts and skills, significant hands-on experience, and the ability to coach others on this Success Factor.
6	Advanced HIGH	I demonstrate a higher advanced knowledge of concepts and skills, significant hands-on experience, and the ability to coach others on this Success Factor.
7	Mastery	I demonstrate expert knowledge, extensive hands-on experience, and the ability to coach others and to set the standard for this Success Factor within and outside the organization.

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Step 1: ASSESS - Where am I Today?

## Success Factor Self-Assessment

Rating	S or D	Success Factor	Rating	S or D	Success Factor
		Acting with Integrity			Learning
		Adaptability			Managerial Courage
		Analysis			Managing Change
		Attention to Detail			Managing Vision and Purpose
		Balance Between Personal Life and Work			Motivating
		Being a Quick Study			Negotiating
		Building Rapport			Optimism
		Business Acumen			Oral Communication
		Closing Sales			Organizational Knowledge
		Coaching			Organizing
		Collaboration			Ownership
		Competitor/Market Analysis			Perseverance
		Composure			Personal Productivity
		Conflict Resolution			Personal Standards
		Credit Savvy			Planning
		Customer Needs			Presentation Skills
		Customer Prospecting			Problem Solving
		Customer Service Commitment			Product Knowledge
		Decisiveness			Professionalism/Impact
		Delegation			Providing Direction
		Developing Others			Recognizing and Rewarding
		Ethics and Values			Resourcefulness
		Fairness			Risk Taking
		Follow-Up			Sales Ability
		Group Facilitation			Self-Development
		Hiring Talented Staff			Sensitivity
		Influencing			Straightforwardness
		Informing			Strategic Agility
		Initiative			Taking a Stand
		Innovation/Creativity			Teamwork
		Involving			Technical/Professional Knowledge
		Job Training			Valuing Diversity
		Judgment			Written Communication

Part II Directions:

Identify your strengths by putting an “S” by those Success Factors you rated 5, 6, or 7.

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Identify your least developed Success Factors by putting a “D” by those you rated 1 or 2.

Step 1: ASSESS – Where Am I Today?

Now that you have identified your strongest Success Factors, it’s a good idea to be able to clearly express how you demonstrate them.

The START concept is used in helping identify actions and results. When using STAR, you answer the following questions:

S – Situation    What situation did you face?

T – Task        What were you expected to make happen?

A - Action      What action(s) did you take in response to the task?

R – Result      What result(s) did your action achieve?

For your top rated Success Factors, use the STAR process to describe how you have demonstrated your competence.



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Step 1: ASSESS – Where Am I Today?

## Step 1 Summary

In the space below, organize the information you have gathered about your values, job satisfaction criteria, and Success Factors. On the next page is a sample completed Step 1 Summary.

What Is Important to Me?	What Do I Enjoy in a Job?	What Are My Success Factor Strengths?

Keeping in mind your values, job satisfaction criteria, and Success Factor strengths, describe your perfect job.

What Success Factors Would You Use Regularly?
How Would You Spend A Typical Work Day?
What Would You Accomplish In This Job?

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Step 1: ASSESS – Where Am I Today?

## Step 1 Example

The below example is included to show you how to complete the guide and is NOT intended to represent data usable by anyone interested in these opportunities. Each individual must evaluate opportunities against their own personal data; actual responses are subjective and will be different for everyone.

Darletta Martinez is a Senior Sales and Service Associate who is working on her business degree and isn't sure of her next career move. We're going to follow Darletta's as she completes this guide and creates her career plan.

Here's Darletta's Step 1 Summary

What is Important to Me?	What Do I Enjoy in a Job?	What Are My Success Factors Strengths?
<ul style="list-style-type: none"><li>• Achievement</li><li>• Expertise/competence</li><li>• Independence</li><li>• Helping Others</li><li>• Variety/new challenges</li></ul>	<ul style="list-style-type: none"><li>• Empowerment/self-direction</li><li>• Contact with customers</li><li>• Challenging/high risk</li><li>• Fast pace/tight deadlines/high pressure</li><li>• Work with many different people</li></ul>	<ul style="list-style-type: none"><li>• Acting with integrity</li><li>• Customer needs</li><li>• Building rapport</li><li>• Customer service commitment</li><li>• Personal standards</li></ul>

### What Success Factors Would You Use Regularly?

*Customer needs, Building Rapport, Customer Service commitment, Technical/Professional Knowledge.*

### How Would You spend a Typical Work Day?

*I would be able to use my professional knowledge to help customers. Each day would be fast paced and there would be variety in my work. I would interact with a lot of different people. The job would be challenging and provide opportunities for achievement through my own initiative.*

### What Would You Accomplish in This Job?

*I'd provide customer service to internal or external customers.*

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Step 1: ASSESS – Where Am I Today?

## Resources for Step 1

### Books

*What Color is Your Parachute?: A practical Manual for Job-Hunters and Career Changers*, by Richard Nelson Bolles. This self-study guide is available from your public library or bookstore.

## Step 2: EXPLORE – What Are My Options?

You can now target opportunities that are comparable with what you have learned about yourself. Step 2 includes an analysis of the career landscape and work trends, leading to an identification of Success Factors that will be in demand. Step 2 helps you answer these questions:

- *How will Career Trends Influence My Future?*
- *How Can I Learn About Opportunities?*
- *What Career Paths Could I Pursue?*

In Step 2 you also identify potential career paths and explore potential job opportunities. At the end of this step you should have a listing of potential opportunities for further analysis.

### How Will Career Trends Influence My Future?

To successfully manage your career, you need to keep informed of current business trends within and outside of your current industry or area of study. Knowing what is happening helps make you better informed about your career choices and development needs. It enables you to predict and plan for opportunities before they become a reality.

The best way to stay informed is to read newspapers, periodicals, journals, and different organizational communications both in paper and online forms.

#### **Explore Career trends by answering these questions:**

- What challenges will your organization be facing in the next 1 to 2 years? In the next 3 to 5 years?
- What areas of business are growing? Are declining?
- Who is buying services?
- What is happening to consumers?
- What demographic are occurring in this and other countries?
- What does the political landscape provide in the way of future careers?

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Step 2: EXPLORE – What are my options?

Next consider the impact of these challenges and opportunities on your own future.

How can your unique strengths and experience best help your current organization or future organization meet these challenges or opportunities?	
Will your Success Factors be in demand, or must you develop new ones to maintain your competitive advantage?	
How will technology affect your position? What must you do to stay current?	

## How Can I learn About Opportunities?

Networking is a technique that can help you make contacts and learn more about positions that may be a good fit. Joan Lloyd, a business columnist on career and workplace issues, says, “**Networking required three ingredients: one part know-how, one part savvy, and one part guts.**” To network effectively, you should get involved in activities that will give you the opportunity to meet and work with others. These activities could be an internal task force, committee, or professional association. Once involved, use the meetings to get to know others and what they do. According to Ms. Lloyd, “**People love to talk about themselves, and there’s no better way to get to know if you have anything in common to pursue in more depth.**”

Once you’ve made contact through networking, logical next step may be to ask them to suggest others you could contact for an “informational interview.” An informational interview is usually a fact-to-face meeting in which you ask questions to learn more about a career field or a specific position. To request an informational interview, be clear about the meeting’s purpose, share your enthusiasm about the field or position, mention who referred you, and ask if it would be possible to meet for 30 minutes to gather additional information.

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## Step 2: EXPLORE – What are my options?

Since an informational interview takes time from someone's busy day, it's important to prepare your questions in advance. Following are some sample questions; you'll want to tailor them to your situation.

- What Success Factors are most critical to the position?
- Are there educational or licensing requirements?
- How did you get into this position or profession?
- Is there a typical career progression into this position?
- Could you describe a typical workday or week?
- How much travel is involved?
- Is relocation an opportunity expectation?
- Which parts of the job are most challenging to you? Most interesting?
- What developments could affect future opportunities? Is the field growing?
- How is the supply of qualified candidates? Are there too many or too few.
- Are there relation professional associations or publications?
- Is there anyone else you'd suggest I talk to?

Use the questions to encourage your contact to share knowledge and experience with you, but be careful not to ask too many. You'd like to leave your contact wanting to share more, rather than wishing you'd leave. It's important to remember that an informational interview is NOT a job interview; you should avoid turning it into one.

Be sure to send a follow-up thank you note after the meeting, sharing any steps you've taken as a result of the information.

## What Career Paths Could I Pursue?

There are three main paths from which to choose when creating a career plan:

- Job Enlargement/Enrichment (Improving your effectiveness in your present position and/or changing or enhancing your present position)
- Lateral Transfer (Finding new opportunities in a different but same level position)
- Vertical Move (Moving upward to meet the organization's needs)

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Step 2: EXPLORE – What are my options?

## 1. Job Enlargement/Enrichment

The job enlargement path may be a good choice if you selected a career you love, are now and expert in that career, and have continue to develop at high, consistent standards.

You can make your job more challenging and stimulating by:

- ✓ Increasing involvement in some area of responsibility.
- ✓ Changing how assignments are accomplished.
- ✓ Accepting additional assignments responsibilities.
- ✓ Looking for opportunities to improve the way things are done.

Answering a few questions will help you determine if the job enlargement path is right for you.

What responsibilities could you assume by taking on some job duties from your supervisor or peers?	
What special task force or team could you join?	
What would you learn by taking on these new responsibilities?	
What activities could you change by simplifying or automating your work processes?	
What job duties that you have mastered could you permanently delegate to others?	
What new skills do you need to learn?	

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## 2. Lateral Transfer

A lateral transfer may be a good choice if you wish to increase your opportunities by learning new skills or if you wish to find a better match for your current skills. A lateral transfer means moving to a different department of function to acquire skills, broaden your experience base, or increase exposure to other parts of the organization to enhance your competitive advantage. This path can provide the experience to get the job you really want but aren't yet qualified for.

Would you consider a lateral transfer? If so,

What lateral move could you make?	
What could you gain?	
What skills are required for the lateral move you identified?	
What are the risks and benefits of the lateral move you identified?	

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Step 2: EXPLORE – What are my options?

## 3. Vertical Move

A person choosing the vertical path identified a position as an ultimate goal and develops through a series of promotions until he or she reaches that position. For many years, a vertical career path has been the norm. With a decreased need for layers of management, there are unparalleled opportunities for job enlargement and lateral growth and an increasing need for people who can perform many tasks. At the same time, there are fewer opportunities for vertical career paths.

Is the vertical path an appropriate option for you? If so:

What position would interest you?	
What is appealing about this position?	
What Success Factors are required in this position?	
How readily available are opportunities?	
How long will it take to develop for this position?	

### Summary

By following Step 2, you should now have a clear picture of your options and the Success Factors required for each. List the specific opportunities that may be right for you on page 23. Indicate the career path for each, and list 3-5 of the most critical Success Factors required by the opportunity. Also include any important information you were able to learn about the opportunity. See Darletta's completed Step 2 Summary on Page 24. In Step 3 of this process you will analyze these opportunities and selection on or more to pursue.

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Step 2: EXPLORE – What are my options?

Opportunity	Path (Check One)			3-5 Most Critical Success Factors	Important Information
	Enlargement /Enrichment	Lateral Transfer	Vertical Move		

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Step 2: EXPLORE – What are my options?

## Step 2 Example

Darletta talked with others in her office and learned of four potential opportunities which she has some interest. To further explore each, Darletta identified 3 questions to ask during information interviewing:

- Which Success Factors are most critical for the position?
- How would you describe a typical workday?
- How does the supply of qualified candidates compare with demand?

Although asking for an information interview as Joan Lloyd said, “took guts” for Darletta, she found that others were receptive to a meeting when she shared that she was exploring career opportunities and asked “would you be willing to meet briefly with me to answer 3 questions about the (opportunity) position.

Darletta used these 3 questions in her information interviews and found that she not only learned the answers to her questions, but that she also learned a lot of other useful information

Darletta completed the following Step 2 Summary:

Opportunity	Path (Check One)			3-5 Most Critical Success Factors	Important Information
	Enlargement /Enrichment	Lateral Transfer	Vertical Move		
Sales & Service Associate at larger office.	X			<ul style="list-style-type: none"> <li>• Customer service commitment</li> <li>• Professional/impact</li> <li>• Building rapport</li> <li>• Teamwork</li> </ul>	<ul style="list-style-type: none"> <li>• Would require more to another office</li> </ul>
Retail Marketing Assistant		x		<ul style="list-style-type: none"> <li>• Technical/professional knowledge</li> <li>• Customer service commitment</li> <li>• Written communications</li> <li>• Innovation/creativity</li> </ul>	<ul style="list-style-type: none"> <li>• Internal customers</li> <li>• Would learn about marketing</li> </ul>
Sales & Service Manager			X	<ul style="list-style-type: none"> <li>• Motivating</li> <li>• Providing direction</li> <li>• Customer service commitment</li> <li>• Hiring talented staff</li> <li>• Coaching</li> </ul>	<ul style="list-style-type: none"> <li>• Supervision of other a major responsibility</li> <li>• Path to Office Manager</li> </ul>
Registered Sales Assistant			x	<ul style="list-style-type: none"> <li>• Customer Needs</li> <li>• Customer service commitment</li> <li>• Personal productivity</li> <li>• Building rapport</li> </ul>	<ul style="list-style-type: none"> <li>• Phone, rather than face-to-face customer contact</li> <li>• Path to Financial Consultant position</li> </ul>

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Step 2: EXPLORE – What are my options?

## Resources for Step 2

### Books

Eighty-eight Assignments for Development in Place. This booklet is available from the Center for Creative Leadership (910-545-2805).

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## Step 3: ANALYZE – Where Do I Want to Go?

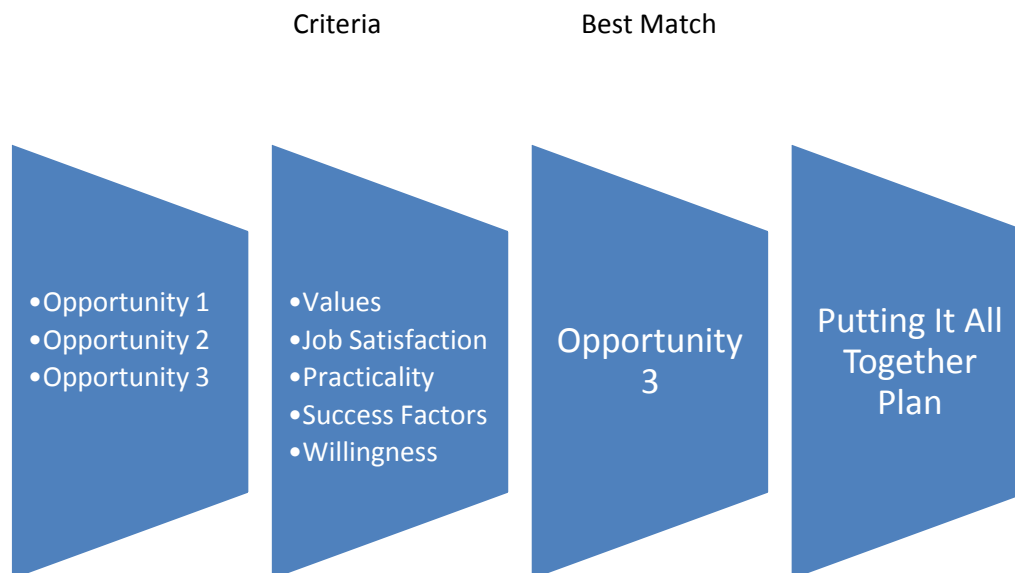
At this point you should have several possibilities to consider. You will need to do some screening to narrow down your opportunities. Step 3 helps you answer two important questions.

- *How do the Opportunities I have identified match My Needs?*
- *Which Opportunity Will I Pursue?*

How do the Opportunities I have identified match My Needs?

Five criteria are used to compare opportunities with needs: values, satisfaction, practicality, Success Factors, and willingness.

The chart on the following pages will help you apply these criteria and identify the opportunity that best meets your needs. Begin by listing at the top of the chart the 1-3 opportunities you are most interesting in pursuing. Then transfer your top five values and your top five job satisfaction characteristics into the left column of the chart. Darletta's example is on page 36.



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## Step 3: ANALYZE – Where Do I Want to Go?

### Values Match

Compare each opportunity you have listed with each value. Ask, “Are they compatible?” Check the box if “yes.”

If you do not have enough information to answer the question, you may need to return to Step 2 and explore the opportunities further.

If only two or fewer values can be attained for a given opportunity, that opportunity may not be a good choice for you.

### Job Satisfaction Match

Determine how practical your opportunities are by considering the factors of money, time, and location. For example:

#### Money:

- Will the opportunity offer the income I need for the lifestyle I want?
- Will the opportunity offer a steady income?

Can I afford the extra expenses associated with the opportunity (commuting costs, new closing, child care costs, etc.)?

#### Time:

- How long will it take to qualify for the opportunity? To master new skills?
- How often must I stay late, take work home, or work weekends?
- How much out-of-town travel is required?

#### Location:

- Will I need to relocate?
- How long is the commute?
- Will parking or transportation be a problem?
- Will I be too far away from the day care center/school/home if I’m needed?

Identify any money, time, or location features you require to make the opportunity practical. List these features on the Step 3 Summary on page 33. Then compare each opportunity with each feature. Check the corresponding box if the opportunity matches the feature.

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Step 3: ANALYZE – Where Do I Want to Go?

## Success Factors Match

Determine if the Success Factors required for the opportunity match your Success Factor Strengths.

Enter the 3-5 most crucial Success Factors required by the opportunity.

List your Success Factor Strengths.

Check the box for each opportunity if your strengths are a match.

## Willingness Match

Determine if you can honestly say, “I would be willing to do whatever is necessary to go for this one!” If so, check the box under that opportunity.

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Step 3: ANALYZE – Where Do I Want to Go?

## Step 3 Summary

Criteria Values (What is Important to Me? – From Page ___)	Opportunity 1: Is this opportunity compatible with my values? Check box if “yes.”	Opportunity 2: Is this opportunity compatible with my values? Check box if “yes.”	Opportunity 3: Is this opportunity compatible with my values? Check box if “yes.”
Job Satisfaction Characteristics (What Do I enjoy in a Job? – From Page ___)	Is this opportunity compatible with my job satisfaction characteristics? Check box if “yes.”		

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Criteria		Opportunity 1:	Opportunity 2:	Opportunity 3:
Practicality	Features required:	Is this opportunity practical? Check box if "yes."		
Money				
Time				
Location				
Success Factors:		List the 3-5 Critical Success Factors for each opportunity. (from page 26)		
Success Factor Strengths (from page ___)		Compare your Success Factor Strengths (left) with the opportunity's Critical Success Factors (above). Check box if there is a match.		
Criteria		Opportunity 1:	Opportunity 2:	Opportunity 3:
Willingness		Am I willing to do whatever is necessary to go for this opportunity? Check box if "yes"		

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Which Opportunity Will You Pursue and Why?			

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### Step 3 Example:

After Darletta talked with her Sales & Service Manager (in step 2), she knew that she wasn't interested in pursuing a Sales & Service position because of the supervisory responsibilities it required. Darletta decided not to include this position in her Step 3 evaluation.

Criteria	Opportunity 1: Sales & Service Associate at a Larger Office	Opportunity 2: Retain Marketing Assistant II	Opportunity 3: Registered Sales Assistant
Values (What is Important to Me? – From Example Page __)	Is this opportunity compatible with my values? Check box if “yes”		
Achievement		X	X
Expertise/competence	X	X	X
Independence		X	
Helping Others	X	X	X
Variety/new challenges		X	X
Job Satisfaction Characteristics (What do I enjoy in a Job? – From example Page __)	Is this opportunity compatible with my job satisfaction characteristics? Check box if “yes”		
Empowering/self-direction		X	X
Contact with Customers	X	X	X
Challenging/high risk		X	
Fast pace/tight deadlines/high pressure	X		X
Work with many different people	X	X	X

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Criteria		Opportunity 1: Sales & Service Associate at a Larger Office	Opportunity 2: Retain Marketing Assistant II	Opportunity 3: Registered Sales Assistant
Practicality	Features required:	Is this opportunity practical? Check box if "yes"		
Money	-Opportunity for incentive	X	X	X
Time	-Little weekend work -No later than 6 PM	X	X	X
Location	-Commute within 30 minutes of home -Convenient to day care	Depends on location	Depends on location	Depends on location
Success Factors		List the 3-5 Critical Success Factors for each opportunity (from page __)		
		Customer service commitment Optimism Professionalism/impact Building rapport Teamwork	Technical/professional knowledge Customer service commitment Initiative Written communication Innovation/Creativity	Acting with integrity Customer needs Building rapport Customer service commitment Personal productivity
Success Factor Strengths (from Example page __)		Compare your Success Factor Strengths (left) with the opportunity's Critical Success Factors (above). Check box if there is a match		
Acting with integrity				X
Customer needs				X
Building rapport		X		X
Customer service commitment		X	X	X
Personal standards				
Criteria		Opportunity 1: Sales & Service Associate at a Larger Office	Opportunity 2: Retain Marketing Assistant II	Opportunity 3: Registered Sales Assistant
Willingness		Am I willing to do whatever is necessary to go for this opportunity? Check box if "yes"		
Which Opportunity Will You Pursue and Why?				
Registered Sales Assistant – it would provide a new challenge because it would require getting Series 7 and 63 licenses and it would build on my customer service skills. It would not involved supervisor in others which is a responsibility I would like to avoid. It would enable me to work closely with a financial consultant to see if that is a career I'd like to pursue in the future.				

### Step 4: Act – What Do I need to Do?

Now that you've determined what opportunities you want to pursue, you need to get specific as to how you will achieve them. In this step you will answer four questions that will help you develop and assess your plan.

- What is my Goal?
- What Actions Do I need to Take to Achieve My Goal?
- Is My Plan Realistic?
- Am I Making Appropriate Progress Toward My Goal?

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Step 4: ACT – What Do I need to Do?

## What is My Goal?

The result of Step 3 should be an opportunity you wish to pursue. Once you've decided, enter the opportunity under "Goal" on your Putting it all Together Plan. Make Sure your goal is attainable in the next 1 to 3 years. If you goal has longer time frame, try to break the goal into sub-goals that will be attainable in 1 to 3 years.

*Action to be effective must be directed to clearly conceived ends.*

*-Jawaharlal Nehru*

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## Step 4: ACT – What Do I need to Do?

### Step 4 Example

Darletta has created her plan for developing the Success Factors required for a Registered Sales Assistant. Although she knows that implementing this plan isn't a guarantee of achieving her goal, she believes it will increase her competence in the required Success Factors. Refer to this plan as you work through the questions of Step 4.

### Putting It All Together Plan

Plan Date: March, 2010

Goal	Success Factors To Be Developed	Action Steps	Targeted Completion Date	Support/Resources Required
Obtain a position as a Registered Sales Assistant in the next 18 months	Professionalism/ Impact	<ul style="list-style-type: none"> <li>Solicit feedback from Juan on how to enhance my professionalism</li> <li>Always speak positively of others</li> <li>Update resume</li> </ul>	4/2010	Candid feedback
			At all times	None
			7/2010	None
	Technical/Professional Knowledge	<ul style="list-style-type: none"> <li>Subscribe to and read Registered Representative book</li> <li>Complete intermediate investing course</li> <li>Complete Series 7 self-study</li> </ul>	Begin 10/2010	\$75.00
			12/2010	Approval to leave early Mondays; \$400.00
			6/2011	Bob and Kid's understanding; \$225
	Building Rapport	<ul style="list-style-type: none"> <li>Ready and implement 7 Habits of Highly Effective People</li> <li>Learn 1 personal interest of each person I interaction with</li> </ul>	8/2010	None
			Begin immediately; check progress weekly	None
	Personal Productivity	<ul style="list-style-type: none"> <li>Attend personal productivity workshop</li> <li>Don't touch paper more than once</li> <li>Use my organizer for everything</li> <li>Plan time to complete the important tasks</li> </ul>	6/2010	Juan's approval
			Immediate	None
			Immediate	None
			Immediate	None

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	Customer Service Commitment	<ul style="list-style-type: none"><li>• Read The Customer Connection</li><li>• Respond to all messages by the end of each day</li><li>• Get feedback from other on my friendliness and helpfulness; take action to improve</li></ul>	10/2010 Immediate 03/2010	None None Candid feedback
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Step 4: ACT – What Do I need to Do?

## What Actions Do I need to Take to Achieve My Goal?

After you've identified your goal, the next step is to complete the columns of *Putting It All Together* Plan.

<b>Instructions</b>	<b>Example</b>
<p><b>Success Factors Column</b> Identify the Success Factors you must develop to achieve your goal</p> <ul style="list-style-type: none"> <li>• Compare Success Factors required for the opportunity with your Success Factors self-assessment.</li> </ul>	<p>Darletta investigated which Success Factors were the most important for a Registered Sales Assistant. Once she had that information she reviewed her self-assessment data (from Step 1). She determined that she needed to work on several Success Factors.</p>
<p><b>Action Steps Column</b> For each Success Factor identified, list very specific actions you will take to develop your knowledge, skill, or behavior.</p> <p>NOTE: If you find that you have two or more opportunities you'd like to pursue, they are likely to have some overlapping Success Factors. Try to identify Action Steps that will address these common Success Factors. This will save you time and effort while developing you for both opportunities.</p>	<p>Darletta has three action steps that she plans to take to improve her Customer Service Commitment:</p> <ul style="list-style-type: none"> <li>• Read The Customer Connection.</li> <li>• Responds to all messages by the end of the day.</li> <li>• Get feedback from others on friendliness and helpfulness.</li> </ul>
<p><b>Targeted Completion Date Column</b> Each Action Step should have a targeted completion date unless it is a behavioral action.</p>	<p>Darletta plans to read The Customer Connection by 6/2010.</p>
<p><b>Support/Resources Column</b> Identify what support or resources you require in order to complete your Action Steps. Support and resources can take many forms. Try to anticipate what the support and resource requirements may be so they don't become obstacles.</p>	<p>Darletta listed a number of specific support and resource requirements: candid feedback from her supervisor and coworkers, her supervisor's approval to adjust her work schedule, permission to attend a workshop, and her spouse and children's understanding.</p>

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Step 4: ACT – What Do I need to Do?

## Is My Plan Realistic?

To help determine if your plan is realistic, discuss your career goals and plans to achieve them with others. Solicit input on other action steps you could take to strengthen your plan. When you are confident that your plan is realistic and complete, begin working on your action steps.

## Am I making Appropriate Progress Toward My Goal?

Because career management is a never-ending process, to be successful, you must be continuously aware of the changing environment and alter to new opportunities. At a minimum, review your progress on the targeted completion dates. In addition, it would be useful to have a check point well before the expected completion date to make sure you're on target. If you find you're not keeping up with your plan, determine why that is and take steps to correct it.

### Monthly Career Progress Checklist

Am I completing my actions?

If not, what will I do to get back on track?

If so, what new actions will I take? (Return to Step 4: Act)

Is my career bringing the satisfaction I expect?

(If not, return to Step 2: Explore.)

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## Step 4: ACT – What Do I need to Do?

The outcome of carrying through on your career plan will hopefully be the opportunity to interview for your desired position! Resume writing and interviewing tips are included in the appendices to assist you in achieving your goal.

### GUIDELINES FOR RESUME PREPARATION AND FOLLOW-UP

Appendix D provides examples of the two most common resume formats: chronological and functional. In addition, it contains a sample of a resume cover letter. After all your work toward your goal, you want to make sure you continue to do everything possible to attain it.

### TIPS FOR EFFECTIVE INTERVIEWING

Appendix E contains tips to help you prepare for your interview. It includes some commonly asked interview questions, response guidelines, and a sample follow-up thank you letter.

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Step 4: ACT – What Do I Need to Do?

## PUTTING IT ALL TOGETHER PLAN

Plan Date:

Goal:	Success Factors to be Developed:	Action Steps:	Targeted Completion Date:	Support/Resources Required:

*The only limit to our realization of tomorrow will be our doubts of today. –Franklin Delano Roosevelt*

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## Appendix A – Success Factors Defined

<b>Success Factor:</b>	<b>Description:</b>
1. Acting with Integrity	Is widely trusted and seen as direct, truthful individual. Presents the unvarnished truth in an appropriate and helpful manner. Deeps confidences. Takes responsibility for own actions; does not blame other for own mistakes or misrepresents self for personal gain or protection. Follows through on commitments.
2. Adaptability	Maintains effectiveness by adjusting personal behavior, work routines, and habits to different conditions.
3. Analysis	Examines information/data to determine essential features. Gathers all relevant information. Identifies key issues and relationships. Draws logical conclusions and interprets results that could be used for decision making. Thoroughly analyzed a situation before generating solutions.
4. Attention to Detail	Directs attention to the task at hand in order to avoid making mistakes. Verifies that each transaction/task is completed accurately. Checks own work for errors and omissions. Shows concern for all aspect of the job not matter how small.
5. Balance Between Personal Life and Work	Balances work priorities with personal life so that neither is neglected.
6. Being a Quick Study	Quickly learns and applies new information, skills, and processes. Builds upon current knowledge and skills.
7. Building Rapport	Uses appropriate interpersonal skills to establish and build profitable relationships with others. Through active listening and questioning, identifies others' needs, interests and "hot buttons," than adapts approach to establish mutual trust and respect.
8. Business Acumen	Knows and understands implications of current and future policies, practices, trends, and information affecting the business and the organization. Is aware of how strategies and tactics will play in the marketplace.
9. Closing Sales	Keeps trying after rejection. Follows up on potential sales opportunities with additional product information/benefits to get the sale. Knows when to persist and when to back off. Asks for the business.
10. Coaching	Observes and tracks performance in order to guide, encourage, support, and instruct employees. Provides positive as well as developmental feedback on performance. Places emphasis on continuous improvement. Offers help without removing responsibility.
11. Collaboration	Develops and maintains effective working relationships with team members, internal partners, customers and other external parties. Seeks and encourages win-win alternatives. Works effectively with people outside formal authority to accomplish goals.

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12. Competitor/Market Analysis	Has a thorough understanding of competition and major markets. Transforms competitive information into an action plan that will capitalize on the company's strengths and the competitions weaknesses. Understands competitor products and services. Can position the company's products against competitors for maximum advantage.
13. Composure	Stays calm and even-tempered when handling crises, stressful situations, or unexpected developments. Remains cool under pressure. Does not become cynical, moody, or hostile when times are tough. Does not show frustration when resisted or blocked. Is able to recover from difficult situations.
14. Conflict Resolution	Brings conflict into the open and uses it productively to enhance the quality of decisions. Arrives at constructive solutions while maintaining a positive working relationship with those who disagree. Helps others resolve disputes and reach agreement.
15. Customer Needs	Gathers appropriate details from or about customers to thoroughly understand their needs. Uses detailed knowledge of customers to steer them to appropriate delivery channels, products, and services.
16. Customer Prospecting	Uses knowledge of market and/or customer base to gain profitable new business and/or increase profitability of existing customers. Looks for and recognizes opportunities for sales/referrals inside and outside the generate lists for follow-up. Identifies opportunities during transactions as well as when interacting with others outside business hours.
17. Customer Service Commitment	Demonstrates sensitivity to customers (both internal and external) and their needs. Proactively addresses customer needs. Follows through on identified problems until resolved. Meets negotiated delivery commitments or advises customer when delays are necessary. Provides higher levels of service to most valued or profitable customers.
18. Decisiveness	Makes decisions without excessive deliberation. Commits to and takes action on decision once made.
19. Delegation	Clearly assigns responsibility and authority for tasks and results to appropriate individuals or teams. Provides necessary direction and resources, pushing down responsibility without abandoning team members or setting them up for failure. Helps to remove obstacles.
20. Developing Others	Provides challenging, stretching tasks and assignments that encourage continuous development of team members. Participates in frequent development discussions. Is aware of each team member's strengths, development needs, and career goals. Assist as team members with creation and implementation of a targeted development plan through feedback and coaching.

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21. Ethics and Values	Consistently acts in line with appropriate set of core values and beliefs as well as in accordance with company policies during both good and tough times. Rewards these values when observed in others and seeks to extinguish demonstration of other values which may create conflict. Practices what is preached.
22. Fairness	Demonstrates consistency, impartiality, and even-handedness in making decisions and maintaining relationships. Treats others as individuals and listens to complaints, suggestions, concerns, or requests. Articulates reasons behind decision. Promptly rectifies unfair situations.
23. Follow-Up	Monitors and evaluates progress on assignments, customer commitments, processes, etc.
24. Group Facilitation	Understands group dynamics. Uses effective communications methods interpersonal skills to guide a group toward objectives. Suggests and helps to implement processes and procedures that maintain group effectiveness. Helps group define objectives and strategies, stay on task, and reach consensus. Solicits participation, challenges ideas, and summarizes accomplishments and planned actions.
25. Hiring Talented Staff	Recruits and hires the best people available from inside or outside the organization. Surrounds self with talented people. Is not afraid to select strong people.
26. Influencing	Uses effective communication and interpersonal skills to convince others to accept ideas and goals or to overcome objections. Gains agreement and commitment from others to support and implement methods or processes. Persuades other to modify their position in order to reach a mutually beneficial outcome.
27. Informing	Provides, in a timely manner, the information people need to do their jobs and to make accurate decisions. Proactively seeks to understand what information is needed. Shares own perspective and insights (e.g., doubts, fears, etc.) as well as personal stories/metaphors if it helps convey the message.
28. Initiative	Is self-starting. Does not wait for signals. Seizes opportunities when they arise. Takes action beyond what is required. Completes assignments independently without constant supervision. Volunteers to take on new assignments. Contributes to others initiatives without being asked.
29. Innovation/Creativity	Originates new and unique ideas. Examines the status quo and looks for better ways of doing things. Recommends changes based on analyzed needs. Develops and introduces practical new approaches or shares best practices to address problems or opportunities.

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30. Involving	Routinely solicits ideas/input from team members, incorporating them into decisions and actions that contribute to the work unit. Fosters an environment where open communication, feedback, idea sharing, risk-taking, and initiative are encouraged. Creates a sense of ownership of jobs or projects.
31. Job Training	Spends time with others (direct reports, team members, etc.) to improve skills and/or shares techniques targeted to that individual's development needs and/or to understand of the work environment.
32. Judgment	Makes appropriate decisions and has the vision to understand their impact. Uses facts and available information to develop logical thinking and emotional insight. Examines alternatives and considers resources, constraints, and risks before committing to action. Most solutions/suggestions turn out to be accurate when judged over time.
33. Listening	Demonstrates attention to and conveys understanding of the comments and questions of others. Actively attends to both what is said and non-verbals used. Has the patience to hear people out. Can accurately restate the opinions of others even when s/he disagrees.
34. Managerial Courage	Provides current, direct, complete, actionable, positive, and developmental feedback to others. Does not hold back anything that needs to be said. Always lets people know where they stand. Quickly and directly faces up to problems. Is not afraid to take tough personnel action when necessary (e.g., put on probation, terminate, demote, etc.)
35. Managing Change	Makes a conscious effort to understand change. Embraces the change and does not become an obstacle to it. Communicates the rationale, benefits, and impact of the change. Develops systems and procedures to effectively implement change. Considers and acts on both the business and human impact of change.
36. Managing Vision and Purpose	Creates and communicates a compelling and inspired vision or sense of core purpose. Sees possibilities beyond today. Creates mileposts and symbols to rally support behind the vision. Makes the visions sharable by everyone. Inspires and motivates entire division or organizations to adopt the vision.
37. Motivating	Creates enthusiasm for the work and a desire to excel as an individual or team. Understands that each person is motivated differently, is sensitive and responsive to these differences, and uses these insights to stimulate others to do their best.
38. Negotiating	Applies effective questioning and listening techniques to determine other parties positions. Presents own position that it is clearly understood. Looks for common ground and builds on areas of agreement to reach win-win outcomes. Ensures that agreed-upon alternatives have the support of all parties involved. Knows bottom-line and allows room to maneuver.

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39. Optimism	Stays positive, bounces back quickly from setbacks. Demonstrates confidence in own ability and knowledge to do the job. Does not take rejection personally.
40. Oral Communication	Speaks effectively one-to-one and in groups. Uses direct eye contact as well as language and non-verbals that are appropriate to the situation and the listeners.
41. Organizational Knowledge	Understands the organization's mission, operating vision, goals, strategies, and culture. Understands the origin and reasoning behind key policies, practices, and procedures. Understands how to manage the organization's formal channels and information networks. Knows the perspective, interests and agendas of others.
42. Organizing	Mobilizes appropriate resources (people, funding, materials, and support) to get things done. Manages multiple activities simultaneously to accomplish goals. May schedule and coordinate work of others. Establishes efficient work procedures to meet objectives. Forms the right structures, processes, and /or teams to enhance productivity.
43. Ownership	Takes responsibility and tackles difficult situations without passing them off to someone else. After making a mistake, admits it and either personally makes corrections or seeks assistance from others.
44. Perseverance	Drives for results. Pushes ahead and maintains focus when confronted with obstacles. Takes charge, knows what is needed or finds out, and moves forward. Gets the job done despite resistance.
45. Personal Productivity	Spends own time on what's important. Quickly focuses on the critical few and puts the trivial many aside. Avoids wasting others' time. Can be counted on to achieve goals and meet commitments.
46. Personal Standards	Sets high personal standards for self. Reviews own performance periodically, seeking continuous improvement. Determines and applies tactics necessary to achieve and/or exceed expectations. Discusses with manager ways to enhance performance.
47. Planning	Accurately scopes out the length and difficulty of tasks and projects. Sets objectives and goals. Breaks down the work into process steps. Integrates planning with the work of other teams as appropriate. Anticipates and adjusts for problems/roadblocks. Measures performance against goals. Evaluates results.
48. Presentation Skills	Prepares and delivers clear, effective, and professional presentations.
49. Problem Solving	Applies both rational and creative processes to identify unknown root causes of problems. Based on the situation, decides the best course of action, implements the solution, and follow-up to see how it's working. Helps to remove obstacles.

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50. Product Knowledge	Has a throughout understanding of features and benefits of products and services provided through one's own delivery channel, and can refer products and services offered through other channels.
51. Professionalism/Impact	Projects a professional image within the company to external parties. Create a positive first impression. Adheres to organizational standards in conduct, grooming, and attire.
52. Providing Direction	Establishes a clear direction and priorities. Reflects company vision and strategy in team goals. Sets challenging objective. Clarifies roles and responsibilities through individual or team performance plans. Serves as a role model to demonstrate skills and behaviors expected of staff.
53. Recognizing and Rewarding	Identifies and acknowledges individual and team accomplishments. Provides praise and/or tangible rewards for achievements. Recognizes individuals for continuous improvement and commitment to quality and service.
54. Resourcefulness	Seeks out and optimize all available resources to achieve the best results consistent with company objectives. Knows who to involve and when.
55. Risk Taking	Willing to try unconventional methods and/or take personal risk to achieve desired outcomes that are consistent with company objectives.
56. Sales Ability	Identifies the needs of internal and external customers through effective questioning and listening techniques. Applies technical/professional knowledge, interpersonal skills, and sales methods to obtain customer's commitment to ideas, services, or products. Handles objections effectively. Asks for the business. Closes appropriate sales.
57. Self-Development	Knows own strengths and how to deploy them. Knows own weakness and limits; works to neutralize or compensate for some and to improve others. Is personally committed and actively works to continuously improve him/herself. Seeks opportunities to learn. Asks for ongoing feedback and coaching as new skills/knowledge are implemented.
58. Sensitivity	Acts in a way that demonstrates consideration for the feelings and needs of others. Maintains and enhances others' self-esteem. Listens and responds with empathy. Acknowledges others' Limits and avoids pushing too hard.
59. Straightforwardness	Communicates directly and to-the-point, relying on the fact-based positions. Avoids the use of ambiguous language or statements that contain hidden or double meaning. Clearly states expectations for all parties; is candid and up-front about what can or cannot be done.
60. Strategic Agility	Accurately anticipates future trends and consequences. Sees the long-range implications of tactical decisions made today. Has broad knowledge and perspective. Can create competitive and breakthrough strategies and plans. Assimilates and prioritizes

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	data and recommendations into operational guidelines that reflect company goals and strategies.
61. Taking a Stand	Steps forward to address difficult issues. Openly supports what is right and in the overall best interest of the work group and company. Stands firm when necessary, even in the face of widespread opposition. Is willing to take unpopular stances and encourages direct/tough debate, but knows when to end it and move on.
62. Teamwork	Does not have to do it alone. Accomplishes tasks through and with others. Helps create and maintain strong morale, spirit, and feeling of belonging in his/her team. Shares expertise and successes with others. Acts as if "true success" is the success of the whole team. Cooperative with team members to resolve problems. And achieve goals.
63. Technical /Professional Knowledge	Possesses and effectively applies the technical/professional knowledge required for the position. Maintains technical skills through regular use. Stays up-to-date on current practices and trends in his/her field. Applies specialized knowledge to organizational problems in a manner consistent with prevailing best practices and standards.
64. Valuing Diversity	Understands, respects, and appreciates individual differences in both employees and customers. Works effectively and productively with all employees to help foster an inclusional work environment. Strives steadily to eliminate all perceived barriers and champions fair and equal opportunity for all.
65. Written Communication	Communicates information effectively through both formal and information documents. Writing is well-organized, concise yet complete, and in vocabulary appropriate to the audience. Constructively reviews and edits the written work of others.

## Appendix B – Guidelines for Resume Preparation

### Purpose

The resume is a summary of your educational work experience, skills, and qualifications for a particular job or career area. The resume serves two purposes:

- to give staffing specialists and potential hiring managers important information about you and your qualifications in a positive manner, and
- to provide a hiring manager with the motivation to interview you.

### Length

The two most common resume formats are presented in this Appendix:

- Chronological
- Functional

### Candidate Summary

At one time it was considered necessary to include a job objective at the beginning of a resume. However, the current thinking is that the objective should be a part of a customized cover letter. Replacing the job objective is a “Summary” that briefly sums up your skills and experience is support by the accomplishment statement that make up a resume.

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## The Chronological Resume

### Description

The chronological resume shows job history from the most recent job and works back in time. Titles and organizations are emphasized and duties and accomplishments within those titles are described.

### When to Use

Use a chronological resume when:

- Your work direction is clear and the target is in line with past work
- You have a steady work history with no gaps
- Your most recent job is related to your job target

### Format

The chronological resume format:

- Organizes experience and accomplishments by employer and dates, starting with your most recent job and working backward to the earliest
  - May group earlier jobs together (to avoid repetition) if more than three or four jobs are represented
- Note: The most recent employment experience, unless very brief, takes up the most space.

### Advantages

The advantages of the chronological resume are that it:

- emphasizes continuity and career growth
- highlights position and title
- is easy to follow
- is the most commonly used and accepted format

### Disadvantages

Disadvantages of the chronological resume are that it:

- may be a hindrance if you are planning to change career direction
- will highlight any lack of experience
- calls attention to any gaps in your employment record

### Sample

A sample of a chronological resume is on the next page.

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## *Chronological Resume Sample*

### **Tracy Q. Graduate**

456 College Hall  
Normal, IL 67890  
111-222-3333  
tracy.graduate@ilstu.edu

**OBJECTIVE:** Aspiring business professional with track record of success. Excellent interpersonal skills. Energetic and creative

**SUMMARY:**

- More than three years experience in life and property/casualty insurance.
- Management internship with Northwestern Mutual.
- Magna Cum Laude graduate with BA in Business Administration.

**EDUCATION:** **Bachelor of Arts in Business Administration, May 2010**  
Illinois State University, Normal, Illinois  
Graduated Magna Cum Laude with a GPA of 3.6 on a 4.0 scale

Courses taken included:

Strategic Management	Personnel Planning and Selection
Organizational Decision Making	Compensation and Performance Appraisal
New Venture Creation	Business Data Communications
Quality Assurance	Staffing and Selection

**EXPERIENCE:** **Insurance Internship, May 2007 to August 2007**

**Northwestern Mutual, Milwaukee, Wisconsin**

- Responsible for documenting standard workflow within agent offices.
- Involved in developing specifications for standard system configuration for agencies.
- Developed program for tracking agent commission annuity streams.

**Property/Casualty Internship, May 2006 to August 2006**

**American Family Insurance, Madison, Wisconsin**

- Developed marketing program to target rural farm customers.
- Assisted with developing actuarial tables for new market segments.
- Named department Employee of the Month.

**ACTIVITIES:**

- Vice President, AMA Student Chapter, 2007-2008
- Secretary, Beta Gamma Sigma honors society, 2007-2008
- Dorm Resident Assistant, 2006-2008

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## The Functional Resume

### Description

The functional resume highlights major areas of accomplishment and strength, and allows you to organize them in an order that most supports future work objectives. Actual titles and dates are in a subordinate position.

### When to Use

Use a functional resume format when:

- you want to make a career change or redirection
- you experience is limited
- you wish to highlight a particularly strong area of ability

### Format

The functional resume format:

- organizes accomplishments and experience under functional or topical headings
- lists the functional topic most pertinent to the next job at the top, followed by at least one other function; e.g., design, production, management, etc.
- lists the chronology or employers, job titles, and dates after the functional categories
- must include at least one functional category to describe your most recent job experience

### Advantages

The advantages of the functional resume are that it:

- gives you considerable flexibility in emphasis
- eliminated repetition of job assignments
- supports a new job target (or career change) by organizing your experience related to your target, separated from your most recent work of job title
- allows you to include non-work related experience
- permits you to organize your experience according to your interests

### Disadvantages

Disadvantages of the functional resume are that it:

- tends to downplay direct experience in specific jobs
- is less commonly used resume when the chronological, and is less popularly accepted

**Sample:** A sample of the functional resume is on the next page.

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## *Functional Resume Sample*

### **Darletta Martinez**

284 Elm Terrace

Jensen Beach, FL 34957

561-333-0819

**Summary:** Highly motivated with skills in accounting servicing, administration, and operations. Well developed communication and interpersonal skills. Energetic and creative. Committed to high standards of conduct and performance. Desire new challenge utilizing my customer service skills.

### **Accomplishments:**

#### Customer Service:

- Received recognition from Senior Management for outstanding customer service
- Efficiently and effectively dealt with customers by processing transactions, initiating sales, and delivering quality service
- Interviewed and profiled customers to determine financial needs, future potential, and analyzed new needs
- Handled all customers' inquiries and resolved customer's problems.

#### Sales:

- Received Service Support Advisor of the year awarded for the past two years
- Sold deposit, credit, and fee products based on customers' needs
- Top producer of sale referrals for six quarters
- Recognized for number of referrals made

#### Teamwork:

- Supported team members through assistance with other office duties
- Actively participated in team initiatives including market analysis and formulation and execution of tactics

#### Supervision:

- Supervised teller staff of seven
- Coached other advisors and tellers

### **Employment:**

1996 – Present

Senior Sales and Service Associate: Bank of the Coast, Sarasota, FL

1995 – 1996

Sales and Service Associate: Bank of the Coast, Sarasota, FL

1993 – 1995

Senior Teller: First National Bank of Pinellas County, St. Petersburg, FL

### **Education:**

A.A., Manatee Community College

### **Association:**

Delta Sigma Pi, National Business Fraternity

Big Sisters of Sarasota County, FL

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## Resume Formatting Tips

### Candidate Information

- Your name, address and a phone number where you can be reached should be clearly visible on the resume. Email address, instant messenger, and cell phone numbers are strongly recommended as additional contacts.
- It is the only personal information that should be included.
- If you have a two-page resume, your name should be typed in the top corner of the second page as well.

### Typing

- Resumes should always be typed by using a word processing program.
- 12-point type is ideal, 10-point is the smallest type size you should use. Remember, a resume should be easy to read.
- Fonts that show block characters is highly preferable. Courier, Times New Roman, etc.

### Bolding

- You may want to “bold” your name and/or the major categories on your resume. The reader’s eye should move comfortably over the page. You want to direct them to important areas of information

### White Space

- Information should not be crowded on the page. Each section of information should be distinct.

### Paper

- Use good quality white or off-white paper. Do not use copy paper.

### Punctuation

- Spelling, grammar, and punctuation should all be correct. Have someone proofread your work.

## Accomplishment-Based Statements

### Purpose

As you read the resumes on the previous pages, you saw that they supplied the reader with information about what the applicant actually did while working in various jobs. These statements are called “accomplishment-based” statements.

### Format

These statements follow a very simple format. They begin with an “action” word (verb) and a description of the accomplishment.

A very simple statement is “Posted changes and corrections to customer accounts.”

### Benefit

Ideally, an accomplishment-based statement shows what benefit the organization received as a result of the accomplishment. An example of this “Provided on-going input to Marketing of Customer Services’ requests and suggestions for production improvement, resulting in change 80% of the time.”

### Examples

Examples of action words to use in writing accomplishment-based statement are:

Developed	Answered	Produced
Managed	Wrote	Designed
Delivered	Collected	Provided
Processed	Directed	Responded
Responsible for	Created	Participated

### Focus

When developing your accomplishment-based statement for your resume, keep your career goals in mind. You are developing these documents in support of these goals. Always ask yourself if your statement will further your interests.

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## Cover Letters

### Cover Letters

Cover letters are your introduction to the reader. A cover letter should always accompany resume.

A cover letter should:

- Address the person who would be hiring you (for example, don't begin with "To Whom it may concern")
- Convey your enthusiasm and commitment to the job
- Be friendly and professional
- Identify something about you that is unique that is related to the position
- Be specific about your goals and what you have to offer
- Be as brief and focused as possible

### Example

The next page contains a sample letter by Darletta Martinez, out applicant.

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## Sample Cover Letter

248 Elm Terrace  
Jensen Beach, FL 34957

August 5, 2010

Ms. Jennifer Perry  
Staffing Services  
9001 East Boulevard  
Sarasota, FL 32256

Dear Ms. Perry:

Enclosed is a copy of my resume following my on-line posting for the Registered Sales Assistant position.

I have worked in the financial services industry for the past nine years and have been a Senior Sales and Service Associate in the banking industry since 2001. My experience in customer service, account serving, and administration, along with my dedication and attention to detail would enable me to “hit the ground running” in this position.

I would appreciate the opportunity to further discuss your requirements as well as my qualifications for the Registered Sales Assistant position with your organization.

Sincerely,

Darletta Martinez

Enclosure

## Appendix – C – Tips for Effective Interviewing and Follow-Up

### **Purpose**

The interview is the hiring manager's opportunity to evaluate a prospective employee and is an opportunity for an applicant to learn more about the position. Questions asked by the interviewer are all designed to answer the question "Why should I hire you?"

### **Research**

Research the job opening and organization in which it exists (Step 2: Explore). Learn what problems are faced by the position and the department. This will enable you to prepare responses to questions that will establish your ability to solve these problems.

### **Practice**

Before going on any interview, take some time to practice. Review the common questions in this section and prepare written responses to them. Ask someone to role play with you. Be prepared to share 3-5 accomplishments with the interviewer. Your "STARS" that you identified in Step 1 will help you prepare.

### **Dress**

The way you present yourself physically is the single most powerful non-verbal communication you make. Dress in a way that demonstrated that you belong in the organization. Find out how successful people in your target area dress and wear similar attire. If the attire is "business/casual," you should still dress in business attire.

### **Punctuality**

Give yourself plenty of time to get to your interview, including time for unexpected delays. Arrive at your interview a few minutes before the appointment time. This will help you maintain your composure and feel relaxed instead of rushed.

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## During the Interview

Following are points to keep in mind when answering the interviewers' questions:

- Try to determine what the interviewer wants to know before answering. Think before answering. It is appropriate to take time to collect your thoughts before responding to a question.
- Your objective should be to convey your strengths and eliminate any anxieties your prospective manager may have about you.
- Relate work experience, education, training, and personality characteristics to the particular job for which you are applying.
- Communicate information that is MEANINGFUL, RELEVANT, AND POSITIVE.
- Convey all positive qualities. Turn negatives into positives.
- Throughout the interview, stress what value you can contribute to the job.
- Don't be too humorous or too serious. Play it by ear – stay within the comfort zone of the interviewer.
- Always be truthful!
- Relax, Nervousness is natural, but it will probably subside once the interview is moving.
- Look for an opportunity to share your accomplishments.
- When you are invited to ask questions, do not ask about salary or hours first. Be prepared to ask meaningful, well-researched questions.

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## Interview Questions

The following are some of the most commonly asked interview questions. Review the questions and take the time to prepare responses before the interview.

**1. Why are you interested in this position?**

- Briefly discuss what you know about the position.
- Discuss how it would be a good match for your skills and offer potential growth and development for those skills.

**2. What are your major strengths? Areas for improvement?**

- When discussing strengths, look at what is MOST transferable to the new position.
- Areas for improvement are tricky. You don't want to focus on anything would get in the way of performing your duties, such as an inability to work with others.
- Focus on ONE area for improvement or failure that you have had, preferably very early in your career.
- No matter what are for improvement you choose, make sure that the interview knows what you are doing or have done to address the issue. You may have read books, attend workshops, etc.

**3. Where do you want to be professionally in the next five years?**

- It is safe to say that you want to be in a position of responsibility, building on the skills that you have. If you have a particular job in mind, say so.
- You may be more valuable to the company if you are seen as someone who is willing to move laterally into various positions while developing a broad range of skills.

**4. What do you know about our department/group?**

- Give a general sketch about the group-what they do, who their customers are, who they interact with, their role in the overall organization.

**5. What do you like least about your current job?**

- First tell the interviewer what you like.
- When discussing dislikes, do so in terms of how you would like to make a greater contribution, expand your skills, or take on greater responsibility.

**6. What are you looking for in your next job?**

- Talk about expansion of your skills and responsibility.
- Do not say "More Money" even if it's true.

**7. What contribution do you think you could make to our department?**

- Choose something that you know is done in the department and show how your skills and experience will support what the group does.

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## What the Interviewer Seeks

The interviewer will focus questions on the Success Factor that have been determined as most important to the position. These are also known as the required knowledge, skills, and abilities (KSAs).

Investigate those critical Success Factors and be prepared to share examples of how you have demonstrated them.

## Sample Success Factor Interview Questions (Also, known as behavioral interview questions)

### Adaptability

- Can you tell me about a time when you had to change your work plans at the last minute? How did you handle it and what was the result?
- Tell me about a situation in which you had to adjust quickly to changes in priorities. What was the impact of the change on you?

### Customer Service Commitment

- Tell me about a specific instance when you took action to improve the level of customer service? How did you determine what action was needed, what did you do, and what was the result?
- Tell me about a difficult customer you had to deal with? Why was s/he difficult? What did you do about it?

### Teamwork

- What have you done to foster a team orientation in your current department?
- Describe a situation where a project did not go as well as planned due to lack of team work. What did you do about it?

### Collaboration

- Describe a situation where you had specific responsibilities but did not have the authority over individuals whose support was necessary to accomplish the results? What were the results and how did you achieve them?
- Tell me about a time when you were asked to help on an assignment outside the scope of your normal responsibilities. What was your role?

### Analysis

- Tell me about a time when you had to decide between several good choices. How did you make your decision?
- Have you ever recognized a problem before others? Tell me about it.

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## **Initiative**

- Give me an example of a time where you went beyond what was required. What was the result?
- What have you done for your personal development in the last three months?
- Do you have a career plan? Please explain what steps you're taking to achieve it.

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## Interview Preparation Checklist

### Pre-Interview

- Learn about the department, job, and Success Factors required.
- Review skills, accomplishments, goals.
- Anticipate interview questions and prepare answers.
- Prepare a list of your most important Success Factors that you want to be sure to address in the interview.

### Logistics:

- Make sure you know the interviewers' name, location of the interview, time, and date.
- Bring two copies of your resume.
- Plan what you're going to wear.
- Make sure you have paper and pen.

### During the interview:

- Remember, the interview starts as soon as you walk in the door.
- Address the interviewer formally unless asked to do otherwise.
- Confirm how much time you have for the interview.
- Make sure you understand all the questions that you're asked.
- Make sure that the interviewer understands your answers.
  - Watch for verbal and non-verbal cues.
- Be factual, do not exaggerate.
- Never speak badly of the company, your manager, or your peers.
- Use concrete examples whenever possible when talking about your Success Factors.
- Illustrate situations where you took the initiative, grew professionally, took charge.
- BE ENTHUSIASTIC
- LISTEN
- REMEMBER, an interview is a conversation.

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## Post-Interview

- Send a thank you letter.
- Follow-up on any phone calls.
- Conduct a personal quality check:
  - Did I talk too much? Not enough?
  - Did I listen well?
  - Did I present my accomplishments in an effective manner?
  - Did I leave the interview with a positive feeling?
  - Was I able to establish rapport with the interviewer? Why not?
  - What could I have done better? What do I have to do to improve for the next time?

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## Follow-Up

Sending a thank you letter is an absolute must after an interview. The letter should be sent out the same day that you completed the interview. A manager may interview many qualified candidates for a position. A small courtesy like a thank you letter may make the difference whether or not you're offered a job.

A thank you letter should:

- be brief
- refer to the position for which you've interviewed
- summarized your qualifications

Phone the recruiter or human resources representative on the agreed upon date (if any) to see if a decision has been made. If you were not the successful candidate, ask for feedback as a "reality check" as your viability for future openings, or your need for further practice in job interviewing.

## Sample Thank You Letter

248 Elm Terrace  
Sarasota, FL 34241

August 5, 2010

Ms. Jennifer Perry  
Director of Human Resources  
9000 Main Street  
Sarasota, FL 34236

Dear Ms. Perry:

Thank you for the opportunity to interview for the Sales Assistant position. I appreciate the time you spent explaining the position and exploring my qualifications.

I believe that my experience in customer service along with my administrative skills and interest in the investment field make me a perfect fit for the position. I would be very interested in discussing the Sales Assistant position with the Area Manager at her convenience.

Again, thank you for your time and interest.

Sincerely,

Darletta Martinez