

PRE-WORK: CAREER UPGRADE LIST

INTRODUCTION

The **Career Upgrade List** is a tool for you to inventory your current career, and see where the opportunities are for you to shape it according to your truest desires. This idea is inspired by a similar tool created by my money mindset mentor, Denise-Duffield Thomas.

This is a tool to help you see the truth of your current situation, and identify opportunities for growth and evolution. Save your assessment so you can review it later and compare your results. This is a powerful way to evaluate how far we've come and uncover new successes to celebrate.

THE RANKINGS

We're using a simple 1 – 5 ranking to take inventory of your career.

- 1 – Not what you want, and may even represent the exact opposite of what you want. Aspects of your career at this level make you feel under-valued.
- 3 – It is what it is, so to speak. It's not bad, it's not great either. Definitely feels like settling.
- 5 – Truly best in class. Makes you feel amazing and is the best you can imagine at this point in time. Is exactly what you want and truly desire.

What is a 5 to one person might be a 1 to another. This is not about what is objectively best, but about what *you, personally, desire* out of your life and your career.

But try not to overthink your rankings. First answer, best answer.

TIME

Consider the time you invest in your work – what you want versus what’s possible for you right now.

**Use the notes field to capture anything that comes up as you go through this exercise.

**Use the extra lines in each table to add any criteria that are important to you.

Criteria	Rank	Notes
Hours/Day		
Hours/Week		
Vacation Time		
Remote work time		
In-office work time		
Flexibility for personal appointments		
Intensive project times		
Breaks		
Time spent working independently		
Time spent working with others		

SETTING

Consider the physical space you work in, versus your ideal state.

Criteria	Rank	Notes
Desk/workspace		
Chair		
Lighting		
View		
Dining options		
Privacy		
Conference facilities		
Audio/visual technology		
Computer		
Phone		
Internet connection		
Web cam		
Decor		

RESPONSIBILITIES

*Consider the work you do – both assigned and self-initiated. Be sure to assess based on what you **want**, not what you think you **should** be doing.*

Criteria	Rank	Notes
Analytical activities		
Collaboration activities		
Personal/professional development		
Strategic work		
Beginning of project		
Middle of project		
End/close of project		
Process development and improvement		

PROJECTS

Consider the projects you work on, current versus your ideal state.

Criteria	Rank	Notes
Size		
Complexity		
Intellectual stimulation		
Management support		
Stakeholder engagement		
Positive impact		
Staffing support		
Timelines		
Budget support		
Strategic alignment		
Methodology		
Agility		
Perceived value of your contribution		

PEOPLE, CONNECTION, & LEADERSHIP

Consider the people you work with, and the connection and leadership you experience, versus your ideal state.

Criteria	Rank	Notes
Functional management		
Project management		
Business management/ Sponsorship		
Business subject matter experts		
Technology management		
Social interaction		
Project teams		
Celebrations		
Company events		
Access to mentoring/coaching		

CARE OF SELF

Consider how you take care of yourself, versus your ideal state. We want to surface desires here because often we use work as an excuse for not taking care of ourselves!

Criteria	Rank	Notes
Clothing		
Wellness (health) care		
Food choices		
Exercise / Movement		
Time in nature		
Adornment		
Personal development & growth		
Professional development		
Personal time		
Family & friend time		
Pets & animals		
Hobbies		

COMPENSATION

Consider all aspects of your compensation, versus what you truly desire.

Criteria	Rank	Notes
Salary – pre-tax		
Salary – take-home		
Bonus		
Health insurance		
Retirement/ investment contributions		
Disability insurance		
Paid time off		
Training & education		
Gifts		
Donation matching		

A useful exercise is to also put a number on all of the compensation you receive annually, so you can appreciate the full investment your employer makes in you.

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PURPOSE

Consider how what you do, who you serve, and how your company serves your purpose – or the bigger ‘why’ you are driven by.

Criteria	Rank	Notes
Organizational vision/mission		
Organizational values		
Value created for customers		
Value created for partners		
Value created for internal staff		
Organizational giving		

GREAT WORK!

Completing an assessment like this requires looking at the truth of your situation, and being honest about your desires. **Celebrate it all!**

This is especially true if you’ve uncovered areas of your life and career that are out of alignment with what you truly desire. You might feel really frustrated, and that’s perfectly normal. Step out of blame or shame, and step into appreciation for the awareness. You can always make a change that serves you.

You might feel the desire to make a change. We’ll be talking about how to make adjustments to your situation all throughout the Energize Your Career Virtual Workshop, so bring your AHAs, frustrations, and desires to the session.