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*6 steps for
reaching the next level
in your career*

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Step 1

Know who you are

“Everyone shines, given the right lighting.” - Susan Cain

Assessing and understanding your unique personality, preferences, and natural strengths is step one to reaching the next level. Personality tests are a great way to increase your self awareness. There are a bunch of personality testing options online, like *DiSC*, *StrengthsFinders*, and *16Personalities*. Understanding your personality is important on many levels.

In your current workplace

You should work hard to identify and harness your strengths in your current workplace and figure out what motivates you. Once you have a good awareness of where and how you'll shine at work, you can be more intentional about what you want to do and who you want to work with. And with even a superficial understanding of personality types, you can often identify traits in colleagues and clients that allow you to adjust your behaviors and work more effectively with them.

Preparing for a career move

Preparing for a career move: Personality assessments also help as you're evaluating career alternatives, and the output can boost your confidence when you mount a big networking campaign or decide to interview for a new position. Personality assessments have an amazing way of accentuating our positive strengths, while softening our weaknesses. You might find it difficult to boast about your strengths, but objective personality assessments provide you with language that can help you sell yourself in situations when you need to do that. Additionally, in the context of a new opportunity, you can compare your personality assessment with the job description and identify precisely where your strengths align with the job duties, and be able to best articulate those alignments or explain why any misalignment won't matter.

Here's what you can do

1

Take a personality test of your choosing. Hint: One of my favorites is [16personalities.com](https://www.16personalities.com) because it's reasonably accurate, it breaks down the information in a digestible format, and it's free!

2

Once you have the test results, jot down 3-5 of your unique strengths, and identify at least 3 specific ways you can amplify them in your workplace (e.g., volunteer for certain projects where your natural strengths would be maximized, or discuss your strengths with your supervisor so she's aware of areas where you're more likely to thrive).

3

Likewise, jot down 3-5 weaknesses and ways you can compensate for those weaknesses (e.g., delegate certain tasks, be more intentional about considering others' perspectives, or rework the way you prepare for a big project).

4

Last, spend some time reading about the other personality types. You'll likely be surprised at your ability to identify the basic personalities of specific people with whom you interact in your workplace. Think of this like finding a key to a locked door. Once you have a basic awareness of another person's personality type, you may be able to better understand what they need from you. I can't make any guarantees that this exercise will be helpful, but it certainly can't hurt!

Step 2

Know what's

important to you

*“When your values are clear to you,
making decisions becomes easier.” – Roy Disney*

Understanding what's important to you makes career decisions so much easier. A lot of people tell me they are unhappy at work, but they can't figure out why. It's often because they took the job without reflecting on their core values. Job seekers sometimes convince themselves that an opportunity is “right” based on a big salary or flashy perks or some other metric that seems important, but they don't compare the opportunity against their core values. They may not even really understand what their core values are, which is not as simple as it seems. If you take the time to reflect on your values, you can sift through your options in a much more informed way.

Here's what you can do

This is a quick exercise to reflect on your overall core values. This is a more generalized version of the values work I do with clients, but it's a great start. Set a timer for 2 minutes and rank the following values on a scale of 1 to 10, 1 being the least important and 10 being the most important. Time is up after 2 minutes. The idea is to use your instincts and not over think it.

_____ *Money and Finance*

_____ *Fun and Recreation*

_____ *Career and Work*

_____ *Environment*

_____ *Spirituality*

_____ *Community*

_____ *Growth and Learning*

_____ *Family and Friends*

_____ *Health and Fitness*

_____ *Partners and Love*

Next, spend 2 minutes mapping out your current time and energy output. The goal here is to figure out if your daily life is aligned with your core values. Using the same list of values above, on a scale of 1 to 10, 1 being the least amount of time and 10 being the most, where are you expending most of your personal time/energy resources?

Does your first ranking closely match the second? If the two rankings are significantly out of sync, you likely aren't honoring your core values as much as you should. What can you do to create more alignment?

Step 3 Create a networking plan

“My advice for folks on networking is give, give, give. You will later receive. But you are really planting these seeds. Some of them will die, and they won’t become anything. Many of them will take many, many years before they pay off for you if at all.” – Sallie Krawcheck

When you’re looking for a new job, it’s tempting to jump online and check recent job postings. DON’T DO IT! Ok, so job postings do have some value, I’ll grant you that. But mostly they are a distraction and a waste of time. 85% of all jobs are obtained through networking, and only 1-2% of jobs are obtained from an online job post. Your time is precious, so don’t waste it on something that won’t give you a good return on your investment. Instead, develop a networking plan, even if you’re not looking for a new job. It’s so much easier to ask a contact for help if you’ve kept in touch with them and aren’t reaching out for the first time in 5 years. The earlier you develop good networking habits, the earlier you’ll start to reap the benefits. And there are few rules around networking. You do you. If you’re good with one-on-one coffees, then aim to schedule a networking coffee once a week for example. If you’re better in big formal networking events, then by all means go for it. Just make sure it’s a meaningful use of your time.

Here's what you can do

Start slow and work up to your ideal networking rhythm. You want to develop good habits that are realistic for your schedule. Studies show that it takes at least 30 days to develop a habit. So, start with a realistic goal for the next 30 days. And think quality over quantity. Can you commit to 1 hour per week for networking? Yes? Ok, then break it down into four hours over the next month. Add it to your calendar.

Someone in the early stages of networking may have a plan that looks like this:

| | | |
|----------------------|-------------------|---|
| <i>Week 1</i> | 25 minutes | Create a list (List 1) of 5-10 people in your existing network that you haven't seen or talked to in more than 6 months. |
| | 25 minutes | Emails to 3-5 people from List 1 with a coffee invite to catch up – no agenda necessary |
| | 25 minutes | Create a list (List 2) of 2-3 people outside of your network that you'd like to meet. |
| <i>Week 2</i> | 20 minutes | Research List 2 for any direct or indirect connections to those individuals. If appropriate, ask for an introduction (you don't want to reach out to someone after a long hiatus and immediately ask for help, so you may need to step back and start with a more general coffee invitation). |
| | 20 minutes | Research upcoming networking events or substantive speakers, workshops or other events where networking may take place. |
| | 20 minutes | Emails to 3-5 people from List 1 with a coffee invite to catch up. |
| <i>Week 3</i> | 60 minutes | Coffee with a connection from List 1, followed by thank-you email. |
| <i>Week 4</i> | 60 minutes | Attend speaker event with a networking hour beforehand. Right after the event, jot down the names of 3 people you met and where they work, any other notes such as mutual connections or other important commonalities/facts. Consider using next week's hour to reach out to one of them... |

See? Wasn't too hard, was it? There's no secret sauce to networking. It's just a matter of developing good habits and executing your plan.

Step 4

Set goals, write them down, and create a plan

“The most difficult thing is the decision to act, the rest is merely tenacity.” - Amelia Earhart

You're more likely to reach your goals if you 1) have actual goals and 2) write them down! Maybe you want to make it to the C-suite. Maybe you want to pay off your mortgage before your kids go to college. Maybe you want to eventually own a business.

If you don't have a goal, something is wrong - you go to work every day and don't know what you're working for! Use the good stuff you learned in Steps 1 and 2 and figure out what you want your life to look like in 25 years. If you consider the amount of time you spend working, don't leave it to chance! I know, I know. It can be really hard to look out that far ahead. I hear that a lot from clients. When that's the case, I encourage them to work backwards. Sometimes it's a lot easier to set goals by backing into them.

Here's what you can do

First, ask yourself some questions to reflect:

- 1. What does success mean to you?*
- 2. What must you achieve during your lifetime so you have no regrets?*
- 3. If time and resources were not a concern, what would you do?*
- 4. What's missing in your life? What would make your life more fulfilling?*
- 5. If you knew you wouldn't fail, what would you do?*
- 6. What are you most proud of in your life?*
- 7. What kind of lifestyle do you want in the long-term?*

Now, what does all of that tell you? Couple those answers with your core values and you should be able to establish goals. But your goals need to be tangible. Let's say one of your strongest core values is financial security, and your answer to the success question (No. 1 above) is, "Being able to retire at the age of 55." That's a great start, but it's too abstract. Convert it to a tangible goal, such as "I want to earn \$xxx by the time I'm 55."

Here's another one. Your strongest values are your family and experiences. And, frankly, your job is necessary to pay the bills and you're really good at it, but it's not what drives you. A life well lived would mean taking your family and seeing the world together. Creating a tangible goal in this case is a little tricky because it involves other people, but it can be done! You poled your family and you collectively decide that a good traveling cadence is a big trip abroad every 3 years, with a trip to a different U.S. National Park every other year and a beach or ski vacation on the off years. That's a tangible goal!

Next, you need to start long-term and work backwards to come up with a timeline. What do you want to do or where do you want to be in 25 years? To achieve that, what needs to happen by year 20? Year 10? Year 5? Year 3? Year 1? 6 months? 3 months? 1 months? 1 week? Keep distilling this down until you know what you need to do next week to reach your long-term goal.

Go back to the example of you as the aspiring 55 year old retiree. You're currently 35 years old working as a mid-level executive. Your partner is also mid-30s working as a mid-level executive. You're each making a competitive salary with annual bonuses, but you have 2 kids, a home, two cars, and other lifestyle realities that would make it difficult to retire at 55 without making some fairly big changes. You've calculated what you need to earn in the next 20 years to retire at age 55 (your tangible goal).

Notwithstanding promotions and salary increases, it's clear you'll need an additional source of income to make 55 happen. You land on the rental housing market to bring in passive income. You calculate that passive income from 4 rentals after expenses, along with your savings, will be enough to sustain you until you can access your retirement investments at 65. Logically, you figure you'll want to buy at least one property every 5 years for the next 20 years. To buy your first property 5 years from now, you'll need a down payment of \$50,000, which means you need to save an average of \$10,000 a year or \$834 per month. There! You just broke down your long-term goal into a short-term plan! This is a wildly oversimplified example, but it demonstrates how this backing in goal-setting concept works in action.

And you're nearly there! The last thing you need to do is write it all down and create a plan to ensure you stick to it! If you write them down, the odds of you achieving your goals will increase exponentially!

I have one more important point about goals: things change all the time. Your values may change, and so may your goals! Revisit your goals often to make sure you're on track and make adjustments as necessary. Best of luck!

Step 5 Get outside of your comfort zone

*“Don’t look at your feet to see if you are doing it right. Just dance.”
- Anne Lamott*

Routines and familiarity (i.e., the comfort zone) give you a nice, steady, predictable level of performance. Think kicking back in a tube on a lazy river. But if you want to maximize your performance, you need to increase your level of stress. White water rafting anyone? There’s a fine line though. Be careful not to push too far outside the zone or you risk an unhealthy level of stress and your performance can drastically suffer (the tipping point). Like maybe hire a guide to take you down the New River instead of flying solo on your first rapids adventure. Find that sweet spot for peak performance!

When you do this, a few cool things will happen. Consistently pushing yourself outside your comfort zone will actually expand your zone. Uncomfortable becomes comfortable. At the same time, your tipping point is pushed farther down

your stress spectrum. For example, the first time you start running to train for a marathon, you may only be able to run a couple of miles. At that point, even a 5K may be your tipping point. But the more you continue to run - each time running a little farther, a little longer - 26.2 miles will ultimately be within your zone.

And here’s perhaps the most important benefit of this comfort zone training. By pushing yourself consistently out of your zone - by your terms that are entirely under your control - your ability to manage increased stress when you’re forced out of your zone will be so much easier! Like when your boss calls on you unexpectedly during the company’s quarterly meeting and asks you to summarize for the Chief Marketing Officer your progress on that new project, you’ll roll with it and shine like the marketing gangsta you are.

Here's what you can do

At least once or twice a year, do something that will push you outside your comfort zone and endeavor to achieve it within a set timeframe - like a speaking engagement or seeking a leadership role on a board or running a marathon. It doesn't have to be related to your work. Stress is a physiological reaction. So figuring out how to manage (healthy) stress under a circumstance unrelated to your work should still help you in those stressful moments in the workplace.

Step 6

Identify an accountability partner

“Find a group of people who challenge and inspire you, spend a lot of time with them, and it will change your life.” – Amy Poehler

I like to think of accountability as goal insurance. Much like the mere act of writing our goals increases the likelihood of achievement, engaging an accountability partner also drastically improves the chance that you'll reach your goals (by up to 95%).

Here's what you can do

Answer 3 questions: Who? How? When?

Who? Identify an accountability partner that can challenge you and be honest with you - whether it's a friend, a partner or spouse, or coach. Talk to that person and share the commitments you've made to yourself. Ask that person to help you stay accountable, and give them express permission to hold you to your commitments and push back when you haven't honored them.

How and when? Come to an agreement on how the accountability partnership will work and when you will communicate. Feel free to be creative in how you go about it. Schedule phone calls, in-person meetings, set a calendar with deadlines, organize a milestone recording system. Try out different things to see what works best.

Now get busy!!

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