

Chapter

2

Planning

The Nature of Careers

A career can be defined as *the sequence of work-related positions a person occupies throughout life*. A career plan, in our view, includes an assessment of employees' current career perspectives and future career goals, along with alternative paths for reaching those goals (developed in light of organizational constraints and individual characteristics and needs). In Chapter 1, we began to lay the assessment groundwork for an overall developmental plan. We see a career plan as part of this overall plan—an overall career “picture” that will help you and your employees make sound decisions about which developmental activities (training, acquiring a mentor or coach, redesigning jobs, and so on) will best meet their short- and long-term needs.

As we noted earlier, employees are less likely to leave the organization if they feel they are part of it and have a future within it. Increased retention levels provide many advantages, and they are just one of the many positive outcomes that will accrue if you and your employees invest the time and effort to create realistic career plans. To help you with your planning efforts, a number of assessment and planning tools are included at the end of this chapter.

Before we move on, it is important to note that the psychological contract between employees and their companies has changed in recent years. Historically, the unstated “contract” or understanding was that the company would provide continued employment and advancement opportunities if the

employee remained with the company and performed his or her job at a high level. Organizational structures are “flatter,” now. Work is organized on a customer or client basis, rather than on functionally, and many companies are downsizing. Authority has been pushed “down” and no longer rests exclusively at upper-management levels. Thus, instead of offering traditional job security, companies can help prepare employees to succeed with their current *and* future employers by providing developmental experiences that will help them cope with changing requirements.

Competing Needs and Goals

In most organizations, competing needs and goals exist in many areas: staffing practices, retention strategies, restructuring, job design, downsizing strategies, and strategic plans. It is no different in the area of employee development: Individual employees, the organization itself, and managers all have different needs and goals in relation to employee development. Many employees are concerned about the reduced chances for upward mobility and the availability of lateral transfers. They also worry about the characteristics of specific jobs (the degree of task variety, meaningfulness, the task completion quotient, etc.); and whether or not the transfer will work with their own interests, values, and work preferences. Thus, employee needs and goals tend to focus more on individual issues. The organization (upper management) tends to view employee development on a more global scale—succession planning, replacement planning, employee possession of appropriate skill sets, cross-training strategies, and so on. The typical manager focuses on development issues that relate directly to the performance of his or her area of responsibility—employee motivation, improved retention, and skill improvement to enhance productivity. As you might guess, successful management of career development programs won't be possible unless you can strike to a balance between these competing needs and goals. This relationship is illustrated in Figure 2.

Career Stages

All “careers” are characterized by a move through four generally recognized stages: exploration, establishment, maintenance, and disengagement. We will examine each of these in turn.

- ◆ *Stage 1—Exploration.* This is the stage when individuals begin to think about identifying a type of work or occupation that interests them. In this stage (generally occurring from the teens to the early-to-late twenties),

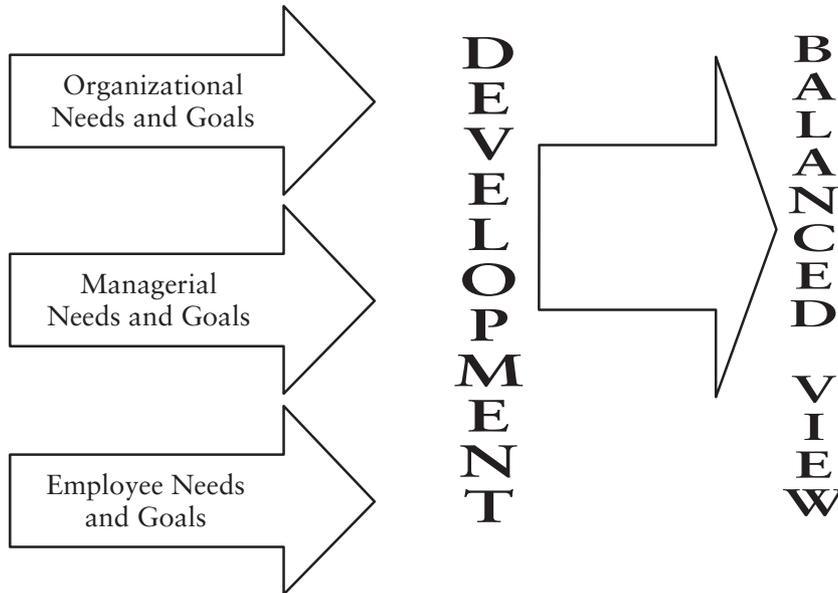


Figure 2: Competing Needs and Goals

people seek information at career fairs and from friends and relatives, co-workers, libraries, and the like. Exploration continues with the person's first job, as they evaluate additional career options. Until they gain adequate job experience, they usually require a good deal of direction and support to be successful. It's very important for the company at this point to provide orientation programs and well-thought-out socialization activities so that new employees can be assimilated into the organization's culture and become contributors as soon as possible.

- ◆ *Stage 2—Establishment.* In this stage, individuals find their place in the organization and begin to be independent contributors. Along with providing contributions to the success of the company, they begin to achieve financial stability and realize how their efforts and relative importance to organizational success are viewed by the company. This is the stage at which you and your employees will do most of their developmental planning.
- ◆ *Stage 3—Maintenance.* As the name implies, the employee in this stage is concerned with keeping his or her skills up-to-date and being perceived by appropriate people as a significant contributor to the company's success. Individuals in this stage are often sought after for advice and

direction in terms of company policies, goals, and strategies due to their years of experience and knowledge of the company and their jobs. Mentors are usually drawn from this group.

- ◆ *Stage 4—Disengagement.* In this stage, individuals prepare to retire, reduce their work hours, or leave the company for various reasons—downsizing, a career change, or incompatibility with the work environment. Many employees are now opting for phased retirement when possible. This is often a win-win situation for both the company and the employee. The company gets to take advantage of the experienced employee’s knowledge and skill and reduce the costs associated with hiring and training a new employee. When employees do leave the company, they often “recycle” back to the exploration stage that involves reevaluation and reexploration of skills, value systems, interests, and potential employment opportunities. It’s important to note that many companies are facing shortages of skilled employees in certain areas. To cope with these shortages, some companies retrain employees from other fields with the hope of recycling them into new jobs and careers. This type of strategy can help reduce replacement costs, since employees who are currently employed by the company already possess certain basic knowledge—of the company, of the industry, of competition, and so on. The implications for the company and the employees are obvious.

Individual Issues

If you, as a manager, wish to change the way you manage people or interact with your employees on an interpersonal level, you must first understand yourself. You must make an effort to honestly assess your behavior patterns and determine why you behave as you do. To create a realistic and appropriate career plan, the same holds true—self-knowledge is critical. Honest assessment of your likes, dislikes, interests, values, and personal goals is a prerequisite for development of a viable career plan. In addition to personal characteristics that influence the nature of career plans, there are a number of organizational and societal issues that might also have an impact on planning. We’ve summarized some of these below.

Career Plateaus

Members of the baby-boomer generation have already reached midlife, and many large employers are downsizing or flattening their organizational structures. As a consequence, increasing numbers of employees are finding

themselves at career plateaus. If plateauing is a possibility in your organization, you and your employees might have to make preparatory adjustments by developing alternative plans. Unfortunately, these changes suggest that careers are going to be less predictable than in previous decades.

Dual-Career Couples

As we are all well aware, many more women have joined the workforce in the past few decades, increasing the number of dual-career couples. It is important that you and your employees remain aware of issues that might affect career planning and progression. Periodic developmental reviews should touch on the issue. Some companies have reported successful resolution of career issues by involving the spouse in the process, even though they might not be employed by the company. This is not the norm, but there might be situations in which spousal involvement is appropriate. Issues often revolve around relocation (purchasing a new home, getting the children into a new school system, the quality of the local school system, availability of medical care, etc.). Check with your HR department to see what support services are available (payment of agency fees, reimbursement for job-seeking trips, local job bank access, and so on).

Generational Differences

Different generations of employees are likely to have different career concerns based (at least in part) on differing value and belief systems. Generational differences do not always apply to all generation members, but there are a number of common traits that should be considered. One typology that is generally agreed upon contains the following generational groups: Millennials or Generation Y'ers (in 2004, they are age 1–early 20s), Generation X'ers (in 2004, they are in their mid-20s to early 40s), Baby Boomers (mid-40s to mid-50s), and Traditionalists or Veterans (late 50s to early 80s) so-called. Millennials are often concerned about challenging work, global issues, and health issues. They tend to accept nontraditional family structures, change, and additional training in order to retain and enhance their employability. They usually have high expectations of the organization. Generation X'ers tend to be independent thinkers, entrepreneurial, team players, and flexible, and are comfortable with new technologies. On the down side, Gen X'ers tend to bring personal concerns into the workplace, don't want to hold people accountable, and have a hard time accepting authority. Baby Boomers tend to be idealistic and competitive, and question authority. Traditionalists tend to be patriotic, loyal, and fiscally conservative, and have faith in institutions. They are also concerned about having their experience valued, and have more respect for previous generations.

Psychological Issues

There are a number of internal issues that plague all of us and affect our work performance and interpersonal relationships. As a manager, it is part of your responsibility to point your employees in an appropriate direction for help with psychological issues should they affect work performance. Many organizations offer Employee Assistance Programs (EAPs) that provide confidential individual and family counseling. If yours does not, direct employees to private or governmental sources. Talk with your HR department to get further information.

Increasing people's self-awareness and self-understanding is important if you are to truly help your employees create more-effective career and developmental plans. Work life and developmental efforts are affected if individuals feel that everyone else is more successful than they are, experience burnout, a midlife crisis, lack of motivation whose source cannot be readily identified, lack of commitment and focus, or fear of failure. Once again, it is not your responsibility to fix these problems, but you might be able to point your employee in the right direction.

Facilitating the Exploration Process

Most of your employees will look to you for career advice as they explore options. You are viewed as a primary source of "inside" information that they know they need to succeed. In your management role of career guide, you are responsible for helping the employee meet personal needs as well as company needs. There are four generally accepted responsibility "hats" you wear as a manager: The first of these is *coach*. As a coach, you must listen to and define concerns, and assist in the career assessment process. As an *evaluator of performance*, the second role you play, you provide performance feedback and clarify company standards, job requirements, and company needs. As an *advisor*, you must help generate enriching work experiences, provide general direction on succeeding within the organization, and help with goal-setting and action planning. As a "*linking pin*," the fourth role, you link employees to career resources, but also help with networking within the organization to connect employees with possible sources of career help and information.

A Process Model

There are many career development process models—useful tools that provide a conceptual framework for thinking about and comparing processes and concepts. Described below is a four-step process that should help you and your

employees keep on track as you develop your career plans. A graphic of the process is provided in Figure 3.

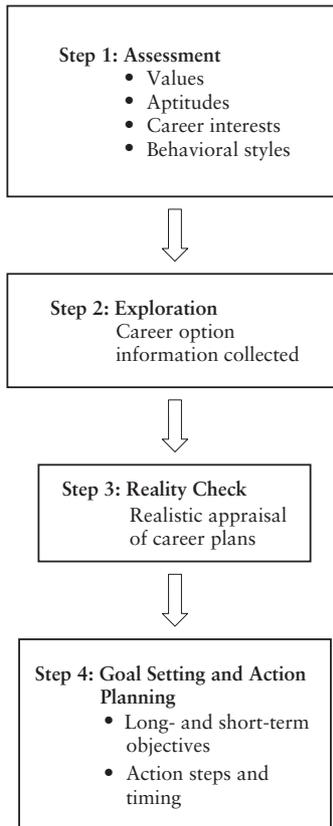


Figure 3: The Career Development Process

Step 1—Assessment. Assessment, or self-assessment, refers to activities directed at acquiring personal information related to values, aptitudes, career interests, and behavioral tendencies (styles). Many psychological tests are designed to measure interest in certain occupations and jobs and the type of work environment an individual prefers. Some of these must be administered and scored by a psychologist or a credentialed administrator, but some can be self-administered or administered by a non-credentialed person. Some tests also measure the relative value an employee places on work and leisure activities. As we noted in Chapter 1, there are a number of Web sites that allow employees to complete various instruments for a minimal charge or at no charge (a number of colleges

and universities sponsor some of these sites as career decision aids for prospective students). These instruments can help employees assess the current state of their career and plan for future career moves. There are also many paper-based instruments on the market (FIRO-B is a good example). Your HR department can help you and your employees determine the most appropriate instruments for the information you are seeking. Perhaps your organization provides career counseling services.

In addition to interests, behavioral styles (how we tend to interact with others), aptitudes for certain types of jobs, and values, we feel that an assessment must also include a look at career goals and priorities and potential environmental risks (within the organization). We have provided a number of self-assessment instruments at the end of the chapter to aid you in this process.

Step 2—Exploration. This stage involves collection and examination of career option information. We see the manager's roles in this stage as those of *linking pin* and *advisor* (as noted above). Employees are sometimes unaware of career information sources and activities. Your company might sponsor career workshops that deal with goal setting, self-assessment, networking, and so on. There might be job postings on bulletin boards or company Web sites. HR might provide career planning workbooks, career counseling services, and career path information. If your employees are interested in certain jobs, you might be able to set up meetings with people currently in those positions and create access that your employees cannot accomplish on their own. The key to this stage lies in helping your employees collect data that will allow them to make sound career decisions.

Step 3—Reality Check. This stage is the point where you and an individual employee take a realistic look at the positive and negative circumstances related to career planning. Questions to ask: Where does the employee fit into company plans? What promotion possibilities exist? What about lateral transfers? Are the employee's career goals realistic? Do organizational constraints exist? Is there a real possibility of relocation? Will the employee relocate? Is the employee flexible and ready for new opportunities? These checking questions and others that you feel are pertinent should be addressed periodically during the planning process.

Step 4—Goal Setting and Action Planning. This final step allows you and your employees to state realistic long- and short-term career objectives that include potential resources and potential roadblocks. You will also

establish timelines for action steps and set completion dates. You might also wish to establish sub-goals.

Assessment and Planning Forms

The remainder of this chapter provides assessment and planning forms that will aid you and your employees in the development of a viable career plan: a work-value assessment, a career-priority assessment, a career risk assessment, a career goal-planning tool, a constraint analysis tool, and a comprehensive career planning document. The information you have derived from the assessment process described in Chapter 1, combined with the information derived from the forms and planning documents provided in this chapter, should allow you to create a sound career plan that will be a significant piece of the overall development plan.

Values

Self-Assessment 2

Values represent relatively stable basic convictions that there are preferable ways to act and be at individual and societal levels. Values begin to develop in childhood, when we are told that there are certain ways to behave or not to behave. As children, it is a “black-or-white” world. Values can be modified later in life if we decide that our underlying convictions that support the value no longer hold.

All values have a content attribute and an intensity attribute. The *content attribute* states that a certain way of being or behaving is important, while the *intensity attribute* specifies how important it is. If we rank our values in terms of their relative intensity or importance to us, we have defined our own value system. Values are important in organizational settings in that they lay the groundwork for attitudes and motivation, which partly determines how we behave in a given organizational setting. We enter organizations with preconceived notions of how things “ought to be.” If our perceptions are inaccurate, we are likely to be disappointed. It’s our feeling that if you are creating a career or developmental plan, it is important that employees understand their own values, especially in relation to organizational values (which are part of the organizational culture). In order to achieve a good organizational “fit,” there should be significant overlap between employee values and organizational values. Self-Assessment 2 is included in the book because we believe that it helps individuals identify what is most important to them as a self-discovery tool.

Career Priorities

Self-Assessment 3

As we know, values are relatively stable. Needs, on the other hand, will change as our circumstances change. A powerful need at one point in time can become a less-powerful driving force after that need is met or our circumstances change. For example, salary might be very important when we are beginning our career, putting children through college, and so on. It might be considerably less important later on, when our children have finished school and the house is paid for. It follows, then, that at different points in our careers, our needs and priorities differ. Self-Assessment 3 is a tool to rank-order current career priorities, providing a sense of what work-related considerations are most and least important at this point in time.

Career Risks

Self-Assessment 4

Risks abound in most organizations. If you and your employees are cognizant of risks, to your career, you'll be better able to make adjustments when events occur that can have an impact on your plans. Layoffs, burnout, and personality conflicts between team members, superiors, and peers can occur without much warning. If you've made a realistic assessment of the risks you'll be better equipped to deal with events if and as they occur. Assessment 4 also addresses factors common to many strategic planning activities—SWOTs (strengths, weaknesses, opportunities, and threats). In our view, a successful career plan must contain a strategy element that allows you to first identify these issues and then develop ways to address them—play to your strengths, eliminate or minimize the impact of weaknesses, seize opportunities, and reduce or eliminate threats.

Career Goals

Self-Assessment 5

Career goals share the same features with other work goals. They should be specific, clearly stated, realistic, and understood by everyone, and they need to have a time element attached. Self-Assessment 5 helps employees think about their career goals and put them on paper, which increases the likelihood that goals will be reached. Although Assessment 5 is a self-assessment, it might be helpful if you sit down with your employees and review their goals in terms of the

factors noted above. You might also wish to discuss types of goals—increased responsibility/promotion to a specific job, specific lifestyle changes, specific lateral transfers, skill-building (capability enhancement), and so on.

Force Field Analysis

Self-Assessment 6

Force-field analysis is a technique used to identify the forces at work in a problem or goal environment that either restrain change or support change. At any given point in time, these forces are generally in balance and the status-quo is maintained. After you have identified these forces, you can take steps to increase the number or strength of supporting forces and eliminate or reduce the strength of restraining forces. Restraining forces might be things like lack of skills, lack of goal information, lack of experience, lack of visibility with key decision makers, and so on. Supporting forces might include timing, organizational staffing needs, the right skills, the right experience, and so on. Self-Assessment 6 can help you list restraining and supporting forces, so you can create a viable career plan.

Employee Self-Assessment 2

Values

Name _____ Date _____

To get a sense of your own value system, place a ✓ on the appropriate place on the scale to the right of the value. Trust your instincts, and don't spend too much time thinking about your values—your results will be more accurate if you respond quickly.

VALUE	Always Valued	Often Valued	Sometimes Valued	Seldom Valued	Never Valued
<i>Advancement</i>					
<i>Authority/Power</i>					
<i>Challenge</i>					
<i>Change and Variety</i>					
<i>Community</i>					
<i>Competence</i>					
<i>Competition</i>					
<i>Creativity</i>					
<i>Decision Making</i>					
<i>Family</i>					
<i>Group Affiliations</i>					
<i>Freedom/Independence</i>					
<i>Friendships</i>					
<i>Helping Others</i>					

PLANNING

VALUE	Always Valued	Often Valued	Sometimes Valued	Seldom Valued	Never Valued
<i>Influencing People</i>					
<i>Job Security</i>					
<i>Knowledge</i>					
<i>Moral Standards</i>					
<i>Personal Security</i>					
<i>Public Contact</i>					
<i>Recognition</i>					
<i>Religious Beliefs</i>					
<i>Salary Level</i>					
<i>Stability</i>					
<i>Status</i>					
<i>Supervision</i>					
<i>Working Alone</i>					
<i>Working under Pressure</i>					
<i>Working with People</i>					

Employee Self-Assessment 3

Career Priorities

Name _____

Date _____

Rank the items in the list below, using the scale of 1 to 10 (1 is the most-important consideration, and 10 is the least-important consideration at this time.) Remember, you can have only one number 1.

_____ **Salary**

(what you now earn)

_____ **Potential**

(Your probability for advancement or increase in earnings)

_____ **Hours**

(Schedule, number of hours you work)

_____ **Kinds of Tasks**

(Doing what you like to do; task variety; using your skills)

_____ **Working Conditions**

(Work setting, facilities, your work environment)

_____ **Interpersonal Relations**

(The quality of your interactions with your superior, co-workers, subordinates)

_____ **Degree of Responsibility**

(Level of decision-making; amount of supervision you receive and give to others)

_____ **Benefits**

(Your benefits package)

_____ **Location**

(Location, including distance of your home to the job)

_____ **Flexibility**

(The flexibility you have in setting your own job hours and job tasks)

Employee Self-Assessment 4 Career Risks

Name _____ Date _____

1. Check the areas below for which you could be at risk within the next 12 months. By assessing your career risks, you will be better able to face change.

- _____ Layoffs
- _____ Rumored layoffs
- _____ Some of your skills will become obsolete
- _____ Personality conflicts with superiors, subordinates, or peers
- _____ Conflict between your values and those of the organization
- _____ Your age (being perceived as too young, too old, or having been with the organization too long)
- _____ Health risks
- _____ Unmanaged stress/burnout

2. Check the statements that best describe your career and work life.

- _____ My current job consumes and dominates my life. I often feel overwhelmed. I need to find time to build my career potential.
- _____ I have an alternate source of income that I can fall back on if my current career becomes untenable.
- _____ I can find fulfillment by doing volunteer work.
- _____ I regularly engage in self-development activities through training, self-directed study, and continuing education.
- _____ I possess skills, knowledge, and abilities that I don't use in my current career.

3. To assess your career strategic assets (which at times can be employed to minimize or eliminate career risks), describe the following.

My career strengths:
