**SMARTtools for Leaders™**

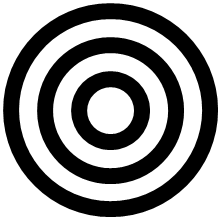
**Career Strategy Discussion** (notes)

**Names:** Karen Tan and Morgan Jones

**Date:** 1/15/2017

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| **PRIORITIES** | |
| ***What do you want, for this next chapter of your career, and why?*** | * Karen is pretty focused on just being “heads down” on succeeding in this new role as VP of Sales. * However, her explicit goal is to become President of a division next, then CEO. * She is driven by impact. She really loves the thrill of figuring out which customers want to buy what features, building talented teams, then mobilizing them to deliver awesome results. * She thinks she has the full package of skills to be President except for a couple of gaps. The gaps are she wants to learn more about finance—P&Ls, balance sheet, cash flow, capital markets, etc. And I think she wants to sharpen up her strategic planning skills. And her product development knowledge. * Karen does not mind working long hours. And she loves being responsive to her teams. * She hates big corporate bureaucracies. * And she does not have the risk appetite to do a startup on her own. |

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| **WHO** | |
| ***What are your strengths in the center of your “skill-will bulls-eye?”***  ***What are things in the second ring, which you can do, but you don’t love to do?***  ***What are things in the third ring, which you are not great at, or don’t like to do?***  ***What are 3 possible paths for your career, from best to worst?*** | * See below. * Best path is VP of Sales to President to CEO of a mid-sized software company. Time to arrange mentor meetings (see below). * Second best path is division GM or staff roles in a giant corporation. * Third best path is doing a startup from scratch. |



Segmented customer marketing

Finance & tech

Hiring & leading talented teams

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| **RELATIONSHIPS: Who are 10 people who can help you get hired to your dream job?** |

1.  Morgan Jones, CEO, current boss.
2. Ron Hatu, CFO (to help mentor Karen on Finance).
3. Jacob Asbar, CFO of BWP (large customer, friend-of-firm status, to help mentor on Finance).
4. Tina Roberts, CTO (to help Karen learn about product development).
5. Harvard Business School executive education program on “Finance for Non-Financial Managers.”
6. Sarona Mital, McKinsey consultant leading our work (to hone strategy skills).
7. Larry Martinez, board member and former CEO (mentor).
8. Josh Steinbock, board member and former CFO of Ford (mentor).
9. Allison Brown, KPMG (Partner in charge of our public accounting work).
10. Elena Botelho, ghSMART Partner who helps great leaders become successful CEOs.