

Career Change Roadmap — Workbook

This workbook is your hands-on companion to the Career Change Roadmap course. Each section maps directly to a course module and contains exercises, worksheets, and checklists you complete as you go — not after. The templates at the end are editable files designed to save you hours of formatting so you can spend your time on the work that actually moves your pivot forward.

Know Yourself Before You Pivot

Complete these activities before researching any target role — the self-knowledge you generate here is the filter everything else passes through.

Exercise: SIMA Peak-Experience Stories

Write 8 brief peak-experience stories (2–3 sentences each) — moments when you were doing something you loved AND did well. These can be from work, volunteer roles, school, or personal life. After writing all 8, list every skill or ability you used in each story, then tally how many times each skill appears across all stories.

- Describe a moment at work when you felt most energised and effective — what were you actually doing, step by step?

- Think of a project or task outside of work (volunteer, hobby, family) where you felt genuinely proud of the result — what made it meaningful?

- Which of your skills appears in 5 or more stories? Circle those — they are likely your motivated ability set.

- Are there skills that appear only when you were obligated to use them (not by choice)? Mark those separately — they are competencies, not callings.

Worksheet: Values Audit — Top 6 Work Values

Rate all 20 Minnesota Importance Questionnaire work values on two dimensions: (A) importance in your ideal role, and (B) how well your current role delivers them. Use a scale of 1 to 5 for both columns. Identify your top-6 values by column A score. Then note the gap (A minus B) for each — large positive gaps signal what your pivot must address.

Work Value Name

Importance in Ideal Role (1–5)

Delivered by Current Role (1–5)

Gap (A minus B)

Non-Negotiable? (Yes / No)

Checklist: Module 1 Completion Checklist

- Completed the Values Audit and identified my top-6 work values
- Wrote 8 SIMA peak-experience stories and tallied skill frequencies
- Identified my top-8 motivated skills (appear in 5+ stories)
- Cross-referenced motivated skills with O*NET Transferable Skills database
- Scored all 8 Wheel of Life domains for current state
- Projected Wheel of Life scores for 12 months post-successful-pivot
- Identified which domains will dip during the transition and drafted a mitigation plan
- Wrote my top-6 values on a card to use as a filter throughout the course

Research and Skills-Gap Analysis

Use these tools to build a data-driven picture of your target roles and map the precise gap between where you are and where you need to be.

Worksheet: Target Role Comparison Table

Complete this table for each of your 2–3 shortlisted target roles using BLS Occupational Outlook Handbook and O*NET OnLine. Do not skip the automation risk column — it is one of the most important long-term factors.

Role Title and O*NET-SOC Code

BLS Median Annual Wage

BLS 10-Year Growth Projection (%)

Typical Entry Education/Credential

Top 5 Required O*NET Skills

Automation Risk Level (O*NET)

Primary Industries Where Employed

Geographic Concentration or Distributed?

Your Alignment Score (1–10 vs. your values)

Exercise: Informational Interview Tracker

Log every informational interview you conduct during your research phase. Complete one row per conversation within 24 hours of the meeting while details are fresh. Aim for 3–5 interviews per shortlisted role before narrowing to your primary target.

- What was the single most surprising thing you learned about this role or field that you could not have found in a job posting or BLS report?
- What specific skill, credential, or experience does this person recommend as the highest-leverage investment for someone making your pivot?
- Did this conversation increase or decrease your enthusiasm for this role? What specifically changed?

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- Who did they refer you to next — and did you immediately send a connection request or outreach email while still in the meeting?
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Checklist: Skills-Gap Analysis Checklist

- Downloaded O*NET skills profile for my primary target role
- Rated my current proficiency for each required skill (0–3 scale)
- Calculated gap for each skill (required level minus my level)
- Sorted skills by gap size; identified my top-5 priority learning items
- Identified the fastest credible path to close each top-5 gap (course, project, mentorship)
- Enrolled in or scheduled the first gap-closure course or certification
- Identified which gaps can be bridged by reframing an adjacent existing skill
- Confirmed with at least 2 informational interviewees that my gap-closure plan is appropriate

Building Your Career-Change Narrative

Draft, refine, and practice the core career-change story that will appear in every application, interview, and networking conversation until you have an offer.

Exercise: PCF Narrative Draft

Write your Past / Catalyst / Future narrative in three separate paragraphs. Time yourself reading it aloud — it should take 2 minutes 30 seconds. Record yourself on your phone, watch it back, and revise until it sounds natural. Complete at least 3 revision rounds before using it in a real conversation.

- Past paragraph (60 seconds when spoken): What is the one-sentence summary of your career in terms of transferable skills and impact — not titles? Start with 'I have spent X years building expertise in...'

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- Catalyst paragraph (30 seconds when spoken): What specific moment, project, or insight made you realise you wanted to pivot? Name something concrete — a conversation, a project, a realisation. Avoid vague phrases like 'I just wanted a change.'

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- Future paragraph (60 seconds when spoken): What do you bring to the new field that a native candidate lacks? This is your unique value thesis — be specific about which cross-domain experience gives you a perspective others do not have.

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- After your third revision, read the narrative to someone who knows both your current field and your target field — ask them: does this make me sound like someone worth interviewing? What is unclear?
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Worksheet: Hybrid Resume Builder

Use this structured template to build the six sections of your pivot resume. Complete each field in order — do not skip the Core Competencies section, as it is the section most read by ATS systems.

Professional Summary (3–4 lines, PCF-derived)

Core Competencies — list 8–10 O*NET-matched keywords

Selected Achievement 1 — STAR-CAR format with number

Selected Achievement 2 — STAR-CAR format with number

Selected Achievement 3 — STAR-CAR format with number

Employment History Entry 1 — company, title, dates, 3–4 reframed bullets

Employment History Entry 2 — company, title, dates, 3–4 reframed bullets

Education and Credentials

Portfolio Projects (optional) — project name, tools used, outcome

Checklist: LinkedIn Pivot Optimisation Checklist

- Updated headline to target role title plus value statement
- Rewrote About section using PCF narrative (3–5 paragraphs, first person)
- Set Open To Work to target job titles matching O*NET occupation names
- Added portfolio pieces or certificates to Featured section
- Updated Skills section: removed irrelevant old skills, added top-10 target-role skills
- Requested endorsements from 3–5 colleagues for transferable skills
- Commented on 3 posts from target-field thought leaders this week
- Profile completeness score is 100% (All-Star status on LinkedIn)
- Profile photo is professional and current
- Custom URL set (linkedin.com/in/firstname-lastname)

90-Day Transition Action Plan

Plan, execute, and evaluate your transition using the weekly sprint structure, financial bridge model, and offer evaluation tools from this module.

Worksheet: 90-Day Sprint Planner

Populate each week with 3–5 specific, measurable actions drawn from the course sprint templates. After each week, rate your completion percentage and note one lesson learned. Review the full planner at the 30-day and 60-day marks and adjust sprint 2 or 3 based on what you learn.

Week Number (1–12)

Sprint Name (Foundation / Build and Reposition / Activate and Iterate)

Target 1 — specific and measurable

Target 2 — specific and measurable

Target 3 — specific and measurable

Completion % (fill at end of week)

One Lesson Learned This Week

Carry-over to Next Week (if any)

Exercise: Offer Evaluation Scorecard

Complete this scorecard for every offer you receive before responding. Use your Module 1 top-6 values as the values alignment benchmark. Score each dimension 1–10. A total score below 55 warrants serious negotiation or declining; above 70 is a strong offer; 55–70 is negotiable territory.

- Compensation: does the base salary, bonus, equity, and benefits package fall in the top 50th percentile of your benchmarked market range? What is the delta from your walk-away number?

- Values alignment: score each of your top-6 work values for how well this specific role and company culture delivers them — be honest, not optimistic.

- Growth trajectory: what is the realistic path to the next role level, and is it clearly defined? Did you ask the hiring manager directly?

- Whole-life fit: re-run your Wheel of Life projection with this offer's specifics (actual commute, actual hours, actual location) — how does the whole-life satisfaction delta compare to your Module 1 baseline?

Checklist: Transition Completion Checklist

- 90-day sprint planner populated with week-by-week targets
- Transition Financial Model completed with my actual numbers
- 6-month bridge fund target calculated and savings plan started
- First 5 applications submitted by end of Sprint 2
- Application-to-interview conversion rate tracked (target: 15%+)
- At least 2 mock interviews completed before first real interview
- BATNA defined before any offer conversation
- Market rate range benchmarked from 3 sources before negotiating
- Offer Evaluation Scorecard completed before responding to any offer
- Final offer received in writing before giving notice at current employer

Your Action Plan

1. Complete all three Module 1 self-assessments this week and write your top-6 values on a physical card you keep visible during the entire process
2. Run O*NET and BLS research for your top 3 target roles and build the Target Role Comparison Table before speaking to anyone in those fields
3. Send 10 personalised informational interview requests using the Module 2 outreach script within the first two weeks; aim for 5 completed conversations in Week 3
4. Complete your skills-gap matrix and enrol in the highest-priority gap-closure course within 30 days of starting the course
5. Write and rehearse your PCF narrative until it takes exactly 2 minutes 30 seconds and sounds natural; record yourself and review at least 3 times
6. Update your hybrid resume and LinkedIn profile using the Module 3 checklists before submitting a single application
7. Complete the Transition Financial Model with your actual numbers and confirm you have or can build a 6-month financial bridge before resigning
8. Populate your 90-day sprint planner and identify your accountability partner before beginning Sprint 1
9. Submit your first 5 applications by the end of week 8 and track your application-to-interview conversion rate
10. Define your BATNA and benchmark compensation from 3 sources before your first offer conversation so you can negotiate confidently from your first offer

