

Career to Calling Guide & Worksheet



You are embarking on a journey that not many people have the good fortune to take.

There is a story, a legend really, that the English architect Christopher Wren asked three stonecutters working on his project what they were doing.

The first replied, "I'm cutting stone." without looking up.

The second replied, "I'm shaping this stone to fit with the others to build a wall."

The third replied, "I'm building a cathedral to worship the Almighty."

Vastly different goals are shaped from differing depths of insight: the bigger the picture, the deeper the purpose.

Without understanding the interplay of your work and your life goals, you'll be grasping for existential meaning well before retirement. Remember, you'll spend the majority of your waking hours at work.

Your life is too important to just get by and pay the bills. Perhaps you'll say that you work simply to feed your family. That's a noble goal. Nonetheless, we all need more.

Seeing how your job impacts the bottom line is often the next step in understanding the bigger picture. But what if you, like the cathedral builder, could envision the *really* big picture? What if you could place your efforts inside a multi-dimensional process within your family, community, country and world? Would that give you more motivation? More meaning? We think so. Research has proven that team members who feel they have a bigger purpose are significantly happier, more productive and profitable.

This worksheet is the first of a three part process. This is our method to guide you toward describing and implementing your calling at work.

The other worksheets in this series will help you drill down into figuring out the best use of your time (HABUT), and then pull it altogether into a One Page Life Plan. We will move from insights in your work, into how they fit your larger life's purpose. You'll have a chance to dream and then turn those dreams into a daily reality with down-to-earth, measurable achievements.

We can dream, but we can't promise magic. Your steady efforts and insights will guide you in the journey - perhaps farther than you can imagine. Let's get started.

Notes:

1. Please print out the worksheets that can be found at the end of this guide and fill them out along the way.
2. This guide is just about your role at *work*, not about your individual, personal life's purpose. We'll cross that bridge when we discuss your One Page Life Plan.

The 4-Step Guide to Identifying your Calling at Work:

Step 1: Dream

"Big dreams= big life, small dreams= small life"

Let's talk about your dream at work. Take a moment and think about what you could do that's really exceptional. Expect to write it and rewrite it. This is normal; it's version 1.0. Next will be version 2.0. Eventually, you will have a masterpiece for your life.

Think big! Ask yourself, "What do I envision that I, as an individual, within this company want to achieve?" Then ask yourself, "What can I imagine the company as a whole can achieve?" You're acting as the navigator for uncharted waters. Here are some questions to get your creative juices flowing.

Please fill out the following questions in your Career to Calling worksheet.

1. If you could accomplish anything at work, what would it be?
2. What's your wildest dream for the company as a whole?
3. What type of person do you want to be at work? How would you want to express yourself? (We are human beings not just human doings.)
4. If you had to deliver your Ted Talk about your role at the company called "I have a dream" what would the talk be about?
5. What is your wildest dream for your Path of Ascension and personal growth in the company? (not just a fancier title)

Example #1 - a Director of Collections wrote:

- My dream is to create and lead the best collections team in the US. We have a "CAN! Constant And Never Ending Improvement" attitude.
- We improve the lives of everyone we touch.

Example #2 - a Director of Client Services wrote:

- My Dream is to leave our clients in "shock and awe". They are shocked by our level of performance and are awed by our level of rapport and responsiveness.
- Our clients are partners for life, send referrals and stay loyal even though others promise a rosier picture.
- My light makes the difference.

WAIT....

Now, before you go any farther. STOP. Actually take no more than 5-10 minutes to answer the 5 questions in your worksheet. It's worth it. Please don't simply look at them and move on. You will only get out of this what you put into it. This is the beginning of your journey and it builds upon itself step by step.

Step 2: Purpose

What's the core of what you're doing, and why are you doing it?

Now we'll work to solidify your dream into an actual Purpose at work. This is your finest version of who you are. It's what launches you out of bed every day. It's your M.O. (Modus Operandi) - how you operate at work.

This isn't just about what your job title is or what you're responsible for accomplishing: your Purpose at work is aligned with your values.

Fill out the following questions on your worksheet.

1. What is the most meaningful part of your job?
2. What part of your job would you continue doing even if you weren't getting paid to do it?
3. Whom do you impact in your current role?
 - a. In what way do you improve their lives?
 - b. Whom do you want to impact more and how will you improve their lives?
4. What do you need to do to leave the work day feeling emotionally satisfied?

Start writing now:

This part is less than five minutes as well. It's focussed on seeing the impact on others and provides a big why for what you are doing. When you can articulate your purpose, you will be able to feel more in sync with your core self. Your Purpose is good for you, the company, your clients and the world. Do this now before you move onto your next step.

Now let's put it into a simple Purpose at work above and beyond your paycheck. Write it in in your worksheet:

My Purpose at work is: _____

This is version 1.0. Don't worry if it's not smooth or grammatically correct. It's not for anybody else, it's just for you. Once you get it out of your head onto paper you will be able to refine it.

Work with your mentor or VIP (Verbal Introspection Partner) to refine it. Say it out loud. Read it and try it on like a new suit; it will need some tailoring. When you get this right it will give you the energy you need to face obstacles and overcome the inevitable challenges with joy.

Example #1:

1. My Purpose is to help consumers live in integrity, help our clients, and find creative solutions.
2. I build thriving, happy teams who love what we do, because we produce great results together.

Example #2:

My Purpose is to improve the lives we touch and build friends for life with magical moments.

Why? Once you've identified your Purpose, ask yourself "why". As in, "Why is this Purpose important?"

"My Purpose at work is _____."

Why is this important?

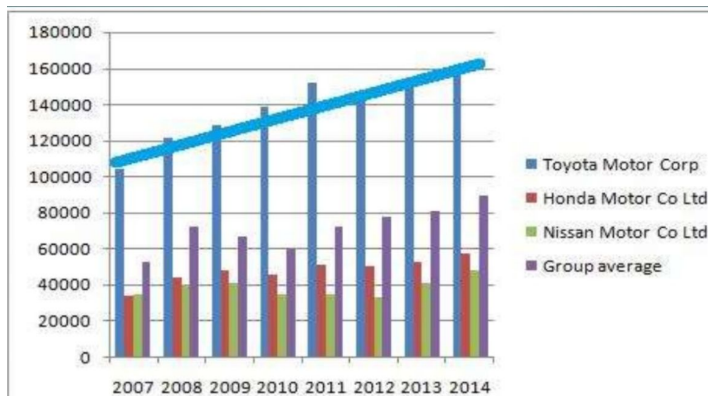
After you answer that then ask again. Why is that important?

After you answer that then ask again. Why is that important?

After you answer that then ask again. Why is that important?

After you answer that then ask again. Why is that important?

Sometimes this is known as the **Toyota Five Why's**.



Toyota went from 0% of the American Market to around 20% in relatively short amount of time by asking the "why question." They were able to get down to the heart of any issue by getting to the core of the issue by asking why five times.

This process helps you get down to the core of what you're really doing, and why you're doing it. You can dig deeper to find out what's driving you.

Extra Bonus: The Litmus test for your Purpose

Question #1: Is your Purpose in line with your job title? If your Purpose is what you're actually getting paid to do, you're on the right track. A major mismatch indicates that you need to change up your work position or rethink your Purpose.

Question #2: Is your Purpose in line with your HABUT (Highest And Best Use of Time)? Your HABUT describes what you should be doing more of - almost exclusively if you can help it. If you decide your Purpose is XYZ, but really you're best and most effective doing ABC (and you were hired for doing ABC) you've got a problem!

Keep in mind, that when you go through the HABUT worksheet (the next worksheet in the series), you may need to revise your Purpose at work based on your HABUT results.

You have to play to win:

Go ahead and play the why game for just 2-3 minutes. Fill it out in your worksheet. You will only understand the profundity of this exercise when you actually experience it. You will likely have an "aha" two minutes from now when you actually do it. Ready, set, go...

Step 3: Game Plan Strategy ***How will you live your Purpose?***

So you've mapped out your Dream and you've thought through your Purpose. Now is where you get down to business. How will you implement your big dreams into "coffee in my hand" Monday morning?

Sports teams don't wing it in order to get to the championships. They strategize and make a game plan. Then they revise the game plan based on new information. And, oh yes, they train, train, train.

What must you do now and each and everyday to succeed? A goal is great, but a goal with a map is even better. Generalities run off a person's back, but specificities rock.

Remember the Purpose of Example #1?

- My Purpose is to help consumers live in integrity, help our clients, and find creative solutions.
- I build thriving, happy teams who love what we do, because we produce good results together.

Her Game Plan looked like this:

1. I coach and bring out the best in others.
2. I focus on small wins daily
3. I live with accountability. I am held accountable and hold others accountable.

Example #2:

My Purpose is to improve the lives we touch and build friends for life with magical moments.

His Game Plan was the following:

1. Improve client satisfaction index by 15 points
2. Create a sense of thriving ownership and urgency among our team
3. To provide SAAB Service Above And Beyond
4. To learn and teach one module a month

We've created a template which can help determine how to move forward in a visually clear way. This Strategies Implementation Worksheet will walk you through how to implement (in real life!) each of your Game Plan strategies. You can find your blank template in the worksheets section.

There are 5 main methods of implementing your strategies.

1. **Training:** Training includes any type of instruction to focus on skill development and acumen. Get your skills up to par or your knowledge up to date.
2. **Planet Leader- Your Support System Set Up:** At the risk of mixing metaphors, imagine that you are a planet and you have moons circling around you. We call this "Planet Leader". You're a planet with a job to do (orbit the sun, manage the ecosystem, dodge space debris). You have people around you who can help: let's call them Heavenly Bodies (we should be so lucky). They can assist you with their knowledge and insights based on years of accumulated experience. Think of your COO and CTO as willing to lend you a hand. Your predecessor could help, if you're on good terms. People who have lateral positions or people who have deep institutional knowledge with your company are really useful. How about your industry peers or a coach? Who can help you get to where you want to go? Here's the good news: if you ask, you shall receive!
3. **Roles:** These are further responsibilities you would take on to help yourself develop additional skills or experience working in other contexts. For example, you're looking for management practice but you don't have anyone reporting to you. Present your thoughts to your manager. You might lead a committee to address a need in the company, or lead one of the regular meetings. You can get creative here—that's how

you can get an opportunity to test new waters without switching positions or going through a structural company-wide change.

4. **Projects:** Projects could be any one-off initiatives or efforts that can help propel your strategies. It's a chance to use new skills or to prove yourself within the organization.
5. **Other:** This gives you a chance to identify other ways you could improve yourself. It could be to report on a certain book or conduct a survey, do research on something, attend a conference, volunteer, etc.

Below is an example of a completed Strategy Implementation Worksheet.

Strategy Implementation Worksheet Example

	How best to strengthen or leverage myself to succeed?				
	Training	Support System	Roles	Projects	Other
Game Plan Strategies					
1. Coach and bring out the best in others	Read Coaching Card Module	Meet with co-worker Stanley 2x/month to practice coaching skills			
2. Focus on small wins daily			Be the company "Daily Thrive" Implementer and coach others through the process	Use the Daily Thrive, list and review 5 wins a day.	
Live with accountability. Be held accountable and hold others accountable.		Peer to peer VIP (verbal introspection buddy) meeting 1/x week for my own accountability.	Train assistant Mark on the new legal process. Work with him on competency and accountability		Chose a consequence for myself if I don't follow through with what I determined

Note: These action items will be used later when you craft your full One Page Life Plan. You will get to chose which of these you want to focus on for the quarter, and turn them into weekly and daily sprints.

Go ahead and fill out your Strategies Implementation worksheet now.

Step 4: Your Milestones (KPI's- Key Performance Indicators)

How will you measure success?

What's the difference between a dream and a goal? A goal is a dream with a timeline and milestones.

Now that you have your strategies to anchor your purpose at work, you need to make them real with meaningful measurements.

This is the nitty gritty of performance indicators. Ask yourself, "What will success look like?" And then drill down. Get specific.

Warning: don't measure everything just because it moves. Identify your "key" metrics. What are the few things that will make the biggest impact? Sometimes it's known as the 80-20 rule. Ask, "What are the top 20% of activities and results that will produce 80% of the results?"

How do you identify your KPIs? Fill out the following questions on your worksheet.

1. What measurements are relevant for your strategies? (for example, customer satisfaction, profit, etc.)
2. How will you measure those? (dollar value, employee engagement score, COGS percentage increase or decrease)? What numbers can you put together that would indicate an attainable improvement?
3. What is the time frame to achieve these KPIs? A month, a quarter, a year?
4. Who will hold you accountable? (To whom will you report?)
5. Is there anyone/ anything in your way that could hold you back from accomplishing these goals? If so, what actions do you need to take to actually achieve these? (For example. get more authority from your manager, have a Courageous Conversation with a coworker, minimize scope of your KPIs, make an internal mindset shift.)
6. How/ where will you track these? (software, dashboard, etc.)

Here we can finish with our champion examples and their Meaningful Milestones and Measurements (KPIs).

Example #1:

1. We outperform our clients in net collections and client delight.
2. Each team member makes enough money to feel great about their work.
3. Our YOY Year Over Year collections and profit increase 10%.

4. Our employee engagement score averages 85 or better.
5. Most conflicts are able to be resolved by using our Values and Purpose.
6. Every team member is able to complete their One Page Life Plan by second quarter.

Example #2:

1. Meaningful Milestones and Measurements
2. Receive 200% more unsolicited customer compliments
3. Reduce mistakes by 10%
4. Increase response time to 5:5
5. More team members refer their friends and family to join our family

A couple of thoughts for the journey, including relishing small wins, and creating mastery.

The concept of Small Wins recognizes that your personal journey and your company's journey are made one step at a time. All of your success will come from creating Version 1.0, then rinsing it, trying it out, learning and readjusting.

Normally, when you first wash something you add soap and then rinse it. The first rinse rarely gets all of the soap and dirt out. To get something really clean, you need to rinse it a few times at least.

So too in growth. You'll need to rinse your new processes a couple of times to build momentum. Many small wins along the way is how you will achieve your big wins.

Mastery comes from consistent practice, small wins and grit. Developing a practice of building successful teams, let's say, or raising the bar on employee engagement takes time, learning curves and commitment.

Next up is the HABUT worksheet. You'll dig deep and figure out the best use of your time with HABUT. You'll also decide how to make more time for those activities that suit you best. It's lots of fun and a huge relief to learn how to carve more time out of 24 hours than you've ever had before.

Career to Calling Worksheet

Step 1: Dream: "Big dreams big life, small dreams small life".

1. If you could accomplish anything at work, what would it be?

2. What's your wildest dream for the company as a whole?

3. What type of person do you want to be at work? How would you want to express yourself? (We are human beings not just human doings.)

4. If you had to deliver your Ted Talk about your role at the company called "I have a dream" what would the talk be about?

5. What is your wildest dream for your Path of Ascension and personal growth in the company? (not just a fancier title)

Step 2: Purpose: what's the core of what you're doing, and why are you doing it?

1. What is the most meaningful part of your job?

2. What part of your job would you continue doing even if you weren't getting paid to do it?

3. Whom do you impact in your current role?

a. In what way do you improve their lives?

b. Whom do you want to impact more and how will you improve their lives?

4. What do you need to do to leave the work day feeling emotionally satisfied?

“My Purpose at work
is _____.”

Why is this important? _____.

After you answer that then ask again. Why is that important?

After you answer that then ask again. Why is that important?

After you answer that then ask again. Why is that important?

Step 3: Game Plan Strategy

Strategy Implementation Worksheet

	How best to strengthen or leverage myself to succeed?				
	Training	Support System	Roles	Projects	Other
Game Plan Strategies					
1.					
2.					
3.					
4.					
5.					

Note: These action items will be used later when you craft your full One Page Life Plan. You will get to chose which of these you want to focus on for the quarter, and turn them into weekly and daily sprints.

Step 4: Your Milestones (KPIs- Key Performance Indicators)

1. What measurements are relevant for your strategies? (for example, customer satisfaction, profit, etc.)
-

2. How will you measure those? (dollar value, employee engagement score, COGS percentage increase or decrease)? What numbers can you put together that would indicate an attainable improvement?
-

3. What is the time frame to achieve these KPIs? A month, a quarter, a year?
-

4. Who will hold you accountable? (To whom will you report?)
-

5. Is there anyone/ anything in your way that could hold you back from accomplishing these goals? If so, what actions do you need to take to actually achieve these? (For example, get more authority from your manager, have a Courageous Conversation with a coworker, minimize scope of your KPIs, make an internal mindset shift.)
-

6. How/ where will you track these? (software, dashboard, etc.)
-