FROM REACTIVE TO PROACTIVE:
Creating Your Strategic Administrative Career Plan

By Julie Perrine,
Founder and CEO, All Things Admin

all things ADMIN
www.AllThingsAdmin.com
Congratulations on downloading this free report from All Things Admin!

The fact that you have taken this first important step shows that you’re an administrative professional who is committed to positioning yourself for success! You are willing to take charge of your career, take ownership for your decisions, and implement real strategies that will take your career to the next level.

This report will show you how to create your own strategic administrative career plan, and help you discover the incredible benefits of taking this proactive approach.

Why a Strategic Career Plan Matters

Before we get started, let me share a little bit about why I am such a strong advocate of strategic career planning for administrative professionals. I have worked in the administrative profession for more than 25 years, and I have held every position from receptionist to executive assistant. Throughout much of my early career, I progressed up the ladder without a lot of hassle – but my career was happening to me instead of me taking a proactive approach and guiding it where I wanted it to go. I didn’t understand the opportunities or full potential that existed in this career field. I was still in this reactive mode when I was approached about an executive assistant position supporting the president of a national company.

Ultimately, taking that job created a complete shift in my thinking and overall approach to career planning. I ended up working for one of the best executives of my career in one of the most toxic work environments. My previous strategies for working successfully in executive administrative environments were challenged daily.

While my executive was interested in and supportive of my goals, I needed a plan that was personalized for me if I wanted to make this profession a career path…instead of just a job. Managing the day-to-day challenges of a job wasn’t worth much to me. But shifting my thinking from job to career made me start acting proactively versus reactively about my situation, and what I
was going to do about improving it. A career was much more valuable! I hadn’t set out to be a job-hopper, but I was starting to see a trend on my resume – I never stayed in one position more than three years.

Then it happened! I found out my best executive ever was leaving the company. I knew there was no way I could stay and work in that environment long term. I also realized that I had to create my career plan because my executive couldn’t create it for me. He was retiring, so I couldn’t follow him to his next company. I had to take charge of my career and create my own strategic administrative career plan.

When I mapped out my plan, and put it into motion, my career leapt forward in ways I never imagined. I was making things happen instead of waiting for someone else to offer me an opportunity. It was one of the most satisfying and professionally rewarding feelings I’ve ever experienced. Now, each year, I hold a strategic planning session with myself to evaluate where I’ve been, where I’m going, and how I’m going to get there. On a monthly basis, I revisit my plans and make sure I’m staying on track. I still can’t believe how much progress can be made in just one year! You’ll be amazed, too!

You don’t have to become self-employed like I did to reap the benefits of a strategic administrative career plan. Each one of us has a unique purpose and calling in this profession, and no two plans are the same. But yours should be perfectly suited to you, your personality, your strengths, your passions, your interests, and your career goals. It will be there to guide you in making the right decisions about training, skills development, new positions, performance review goals, and more.

How to Get Started

Have you ever planted a garden in your backyard? Before you went to the garden center to purchase plants, shrubbery, or seeds, you most likely diagramed out what you wanted the project to look like when you were finished. Whether you hired a professional to guide you through the process or started the planning on your own, you were prepared when you went to purchase the
materials for your project. Your diagram guided you through the selection and purchase process, as well as the planting when you got home.

Going through your administrative career without a strategic career plan is like going to the garden center without a landscaping plan or a list. You have no idea what you want the end result to look like. You have no idea which plants or seeds you need to purchase. You may choose things that are not the best option for the various areas of your yard. It may end up costing you more because you were buying on impulse instead of based on a plan. The overall look of your finished project lacks coherence and continuity.

Your administrative career cannot be left to chance. Career-minded administrative professionals don’t put their career on autopilot and hope things work out. They create a proactive strategic plan that lays out the details, timelines, and desired outcomes to reach goals and propel their careers forward.

Whether you’re in a position you love or feel like your career has stalled, a strategic career plan will help. It will better prepare you to transition to your next opportunity. This isn’t an activity you do once and put it on the shelf either. Strategic career planning is an ongoing process that you need to revisit frequently.

Don’t worry if you don’t have a strategic career plan yet – we’re here to help you get started!

**Templates and Forms to Help You**

Use this document as a starting point for creating your strategic career plan. I recommend you three-hole punch it, place it in a three-ring binder, and create a strategic career planning binder so you have it handy to refer to and track your progress toward your goals throughout the upcoming year.
We’ve left spaces for you to answer the questions as you read through this report. Some of these questions may require some thought and contemplation as you think about your new approach going forward. Take your time in answering them as you work through this planning exercise.

To download the strategic career planning templates in this report, visit AllThingsAdmin.com/free-templates.

Let’s get started!
What is a Strategic Career Plan?

A strategic career plan is a combination of your personal vision, mission, and goals used to guide your professional growth and development. It’s for individuals who want to grow, remain competitive, or become more competitive in their fields. It puts you in the driver’s seat of your career. It helps you create the mindset from which you make important decisions about how you allocate your time, money, and energy in pursuing your goals. It’s absolutely vital to your administrative success!

Elements of a Strategic Career Plan

Most strategic career plans address three key areas:

1. Where are you now?
2. Where are you going?
3. How do you get there?
1. Where are you now?

Think about the past year.

- What goals did I achieve? What went well and why?

- What goals did I fail to achieve? What got in the way and why?

- What do I like best about what I do?

- What are my biggest career challenges or barriers?

- How well do I understand the changes that are occurring in my work environment and/or my industry? How can I increase my business acumen?
• What unique value do I provide in my professional life?

• How does the value I provide distinguish me from other administrative professionals?

2. Where are you going?

• Why am I an administrative professional? Did I choose this field, or did it choose me?

• What is my specialty or niche?
- Do I know what the critical success factors are for me? (Skills, resources, organizations, etc.)

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<th>SKILLS</th>
<th>RESOURCES</th>
<th>ORGANIZATIONS</th>
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<td>(E.g. Specific skills in technology, communication, event planning, meeting facilitation, organization, etc.)</td>
<td>(E.g. Networking, coaching, mentoring, books, webinars, blogs, podcasts, training – including travel and registration fees, etc.)</td>
<td>(E.g. Local or national organizations, online memberships, IAAP, ASAP, IMA, or professional associations related to a specific area – project management, event planning, travel, etc.)</td>
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• Have I looked at my strengths, weaknesses, opportunities, and threats (S.W.O.T. analysis) for the target job or position I want to attain? Do a separate S.W.O.T. analysis for each target job or position you consider. They may be very similar, but each opportunity has its own S.W.O.T. to analyze.

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<tr>
<th>Strengths:</th>
<th>Weaknesses:</th>
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<tr>
<td>Personal traits or abilities that will help you achieve your goals</td>
<td>Things that will make it more difficult to achieve your goals</td>
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(E.g. Refer to your personality type assessments or StrengthsFinder reports. Include certifications, education, etc. What are you really good at?)

(E.g. Are you missing key skills? Is your network inactive? Are you a perfectionist or impatient? Do you say yes too much? Do you lack discipline?)

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<tr>
<th>Opportunities:</th>
<th>Threats:</th>
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<tr>
<td>Outside events, conditions, or plans that might create opportunities for your goals</td>
<td>Outside events, conditions, or plans that might adversely impact your goals.</td>
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(E.g. Are you well known and liked in your current company? Economic conditions. Unexpected staff or leadership changes.)

(E.g. Economic downturn. Family needs necessitate change of plans. Executive retires or resigns and your position is eliminated or reassigned.)
What is your vision and mission for your life and career?

Here’s a helpful visioning exercise I’ve found helpful in this process. Complete the following statements:

- Wouldn’t it be nice if…

- When my life/work is ideal, I have/am…

- Personal success for me means…

- Professional success for me means…

What is the overarching theme in your responses to these statements?

- Your mission: What is the intent/impact I want to make (daily)?
  - The accomplishments you wish to achieve
  - The cause or group you wish to serve (it could be yourself or your executive or your family)
  - The mission statement should be supportive of your current employer’s mission if you are trying to advance your career within your current place of employment
  - The mission should be clear, concise and informative

The best tool I’ve found for creating a mission statement: Franklin Covey Website

https://msb.franklincovey.com/
3. How will you get there?

This is where the plan becomes the true roadmap for your success. Begin by writing down all the things you need to do to get where you want to be. Here are a few areas you may want to consider:

- **Certifications**
  - [https://allthingsadmin.com/administrative-professionals/all-things-admin-newsletter/get-certified-4-keys-to-achieving-a-professional-certification/](https://allthingsadmin.com/administrative-professionals/all-things-admin-newsletter/get-certified-4-keys-to-achieving-a-professional-certification/)
  - [https://allthingsadmin.com/administrative-professionals/4-career-benefits-professional-certifications/](https://allthingsadmin.com/administrative-professionals/4-career-benefits-professional-certifications/)
  - [https://allthingsadmin.com/administrative-professionals/all-things-admin-newsletter/5-specialty-certifications-to-enrich-your-admin-career/](https://allthingsadmin.com/administrative-professionals/all-things-admin-newsletter/5-specialty-certifications-to-enrich-your-admin-career/)

- **Education**

- **Training**

- **Mentoring and coaching**
• Branded resume package

Develop a personal branding statement.

*List the three words or short phrases that best describe the way you work, think, function, or perform professionally.*

1. __________________________
2. __________________________
3. __________________________

Examples:

- Strategic thinker. Problem solver. Administrative professional.
- Project manager. Event planner. Office professional.
- Process analyst. Microsoft Office expert. Travel planning pro.

Incorporate your personal branding statement along with any professional certifications or credentials you have at the top of your resume to create a powerful first impression when someone sees your name for the first time.

Example:

**ORIGINAL**

**JULIE L. PERRINE**

**EXPERIENCE:**

Executive Administrative Assistant to the President
Provided executive support for the President and Group Vice President of Business Development including

**PERSONAL BRANDING STATEMENTS**

Julie Lynn Perrine, CAP-OM, MBTI Certified
Chief Excellence Officer - Personality Strategist - Administrative Professional
www.julielynn.wordpress.com

**PROFILE**

Successful administrative professional and entrepreneur with excellent communication and organization skills who teaches administrative professionals and entrepreneurs how to increase their professional opportunities and achieve more hedonistic and meaningful lives while also utilizing their skills and strengths. For more information, visit julielynn.wordpress.com.
Create personal business cards to match your resume.

- Name
- Certifications
- Personal branding statements
- Digital portfolio site link
- LinkedIn profile link
- Other social site links
- Email
- Phone number

Julie Perrine, CAP-OM, MBTI Certified
Collaborator • Problem Solver • Administrative Professional

www.JuliePerrine.wordpress.com
www.LinkedIn.com/in/JuliePerrine
www.Twitter.com/JuliePerrine
name@email.com
Mobile: (XXX) XXX-XXXX

- Professional portfolio
  - Resume
  - Personality type or StrengthsFinder assessments
  - Education and training
  - Letters of recommendation
  - Work samples
  - Professional association memberships and leadership roles held (if applicable)
  - Volunteer work
  - Awards and recognition

- Prove It! Stand Out and Effectively Demonstrate Your Skills Every Time with a Professional Portfolio
Sample Digital Portfolio: JuliePerrine.wordpress.com

- 3 Key Strategies to Boost Your Professional Visibility
  http://allthingsadmin.com/administrative-professionals/3-key-strategies-boost-professional-visibility/
- Your Career Edge: Create a Powerful Professional Portfolio
  http://allthingsadmin.com/career-planning/portfolios/
- Your Career Edge: Create a Professional Online Portfolio
  http://allthingsadmin.com/career-planning/portfolios/
- The Undeniable Benefits of Blogging
  http://allthingsadmin.com/administrative-professionals/undeniable-benefits-blogging/

- Professional association memberships
  - https://www.allthingsadmin.com/administrative-professionals/7-ways-invigorate-career-professional/
• Networking – online and in person
  - https://allthingsadmin.com/administrative-professionals/get-connected-7-reasons-admins-need-social-media/
  - https://allthingsadmin.com/administrative-professionals/social-media-online-goldmine/
  - https://allthingsadmin.com/administrative-professionals/strutting-skills-abilities-expertise/
  - http://allthingsadmin.com/administrative-professionals/what-are-your-online-profiles-telling-the-world-about-your-administrative-personal-brand/

• Publications and books to read

• Retirement planning

Turn these into SMART goals by making them specific, measurable, actionable, realistic, and time specific by using the following career planning templates to create your action plan.
Goals, Objectives, and Action Items

Start by identifying three to five professional goals or objectives for the year to avoid overwhelm and keep things manageable. When you get them accomplished, you can always choose more.

20XX Strategic Administrative Career Planning

for

[Your Name Here]

[SAMPLE]

My career objectives for 20XX are:

1. Attain the CAP certification
2. Attain the OM certification
3. Attend one professional development conference for administrative professionals
4. Create a professional portfolio
5. 

My accountability partner(s) will be:


I will track and review my progress each month on the _______ day of the month.

Dates I reviewed my progress:


Download the strategic career planning templates at AllThingsAdmin.com/free-templates.
Then take each individual goal or objective and create your plan of attack.

1. List the steps involved in completing the objective in detail.

2. Identify any resources you may need at each step in the process.

3. Map out a targeted completion date for each step.

4. Then write down your start date when you actually begin and your completion date when you accomplish each step.

Identifying your target date and documenting your start and finish dates will help you with creating more realistic timelines for your goal setting strategy in the future.

| GOAL/OBJECTIVE: Attend one professional development conference for administrative professionals. |
|---|---|---|---|
| Steps/tasks involved. | Resources I may need to complete this | Targeted Completion Date: | Start Date: | Actual Date Completed: |
| 1. Research administrative conference options and dates | | February 15, 20XX | |
| 2. Research the travel expenses associated with the event – air travel, hotel, meals, etc. | | February 28, 20XX | |
| 3. Talk to my boss about the options I've researched and seek approval for attending | | March 15, 20XX | |
| 4. Register for the approved conference | | | |
| 5. OR Do additional research on options that my boss and I discussed | | | |
| 6. Attend the conference. | | | |
| 7. Send a thank you note to my boss for allowing me to pursue professional development and for supporting me in doing so. | | | |

Notes / Comments / Challenges I faced and how I overcame them:
Along the way, be sure to identify the obstacles or setbacks you encountered so you can factor those things into future goal setting.
## 20XX Strategic Administrative Career Planning

for

[Your Name Here]

| GOAL: Develop a professional portfolio to showcase and prove my skills and experience. |
|---------------------------------|-----------------|-----------------|-----------------|-----------------|
| Tasks involved: | Resources I may need to complete | Targeted Completion Date | Start Date | Actual Date Completed |
| 1. Take a class, check out a book, or research online regarding how to get started. | $15 for a book $40 for a class Time to research online | February 28, 20XX |  |
| 2. Create a list of items to include: Resume References Diploma copy Training certificates Letters of recommendation Work samples | | March 31, 20XX |  |
| 3. Create list of projects I've worked on within the past year that I want to include. | | March 31, 20XX |  |
| 4. Create list of community service or association (i.e. IAAP) committees I've served on or worked on projects with. | | March 31, 20XX |  |
| 5. Purchase a binder and tabbed dividers to start assembling it. | $6 for view binder $4 for tabbed dividers | March 31, 20XX |  |
| 6. Begin collecting samples I want to include and put them in the binder. | | April 30, 20XX |  |
| 7. Create cover sheets for each project explaining my role in the project (Project, Action, Results) | | April 30, 20XX |  |
| 8. Have a friend, colleague, or mentor review the materials for accuracy, content, and relevance. | | May 31, 20XX |  |
| 9. Begin using the portfolio for performance reviews, one-on-one meetings with my manager, or job interviewing. | | June 15, 20XX |  |

Notes / Comments / Challenges I faced and how I overcame them.
Creating Your Personalized Plan

20XX Strategic Administrative Career Planning

for

[Your Name Here]

My career objectives for 20XX are:

1. 
2. 
3. 
4. 
5. 

My accountability partner(s) will be:


I will track and review my progress each month on the _________ day of the month.

Dates I reviewed my progress:

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Notes / Comments / Challenges I faced and how I overcame them:
Take Charge of Your Career

A strategic career plan helps you reconnect with why you chose the administrative profession in the first place. Successful, career-minded administrative professionals do not depend on chance. They choose to plan. They choose to grow. They choose to succeed.

So, what are you waiting for? Take charge of your career by creating your own personalized strategic administrative career plan today!

Not sure where to start? Let us help!

Getting Started with All Things Admin

1. Sign up for our free report to learn more about creating your own strategic career plan. (You just completed this step!)

2. Take our Career Preparedness Quiz.

3. Join our AdminPro Training Series and gain access to additional resources and experts on a monthly basis who will sharpen you and give you a competitive advantage.

4. Develop your comprehensive professional portfolio strategy with the tools available at All Things Admin:
   - Print Portfolio Ebook
   - Print Portfolio Course
   - Digital Portfolio Ebook
   - Digital Portfolio Course
   For more information on any of these options, visit AllThingsAdmin.com.
About Julie Perrine

Certified Administrative Professional® – Organizational Management  
Certified Myers-Briggs Type Indicator® Administrator  
Certified Productivity Pro® Consultant

Julie Perrine is an administrative expert, trainer, speaker, and author. She is the founder and CEO of All Things Admin, a company dedicated to developing and providing innovative products, training, and resources for administrative professionals worldwide.

Julie has more than 25 years of experience in the administrative profession spanning several industries and serving in corporate and startup settings. Her mission is to guide, encourage, and connect administrative professionals to the innovative technologies, ideas, resources, and people they need as they work toward achieving their career goals. Her upbeat, straightforward, step-by-step approach to handling the opportunities and challenges facing administrative professionals gives them proactive strategies for developing a plan, creating forward motion, and achieving great results.

Julie transformed a career as an administrative professional into several successful enterprises and shares her knowledge, expertise, and resources with individuals, corporations, and organizations as an online business model consultant, personality type strategist, and productivity expert. As a certified Myers-Briggs Type Indicator administrator, she facilitates understanding and communication among individuals and teams to improve performance, communication, self-awareness, and team cohesion through workshops and individual consulting services.

Julie is the author of three print books: The Innovative Admin, The Organized Admin, and Become a Procedures Pro. She has also published e-books including, Your Career Edge: Create a Powerful Professional Portfolio and Your Career Edge: Create a Professional Online Portfolio.
Julie has created several innovative tools and programs for administrative professionals, including the AdminPro Training Series, AdminTech Crash Course, Administrative Procedures Toolkit, Kick-Start Creating Your Administrative Procedures Binder Course, Professional Portfolio Builder, and ePortfolio Builder.

In addition to writing for All Things Admin, Julie also regularly writes for the Executive Secretary Magazine, International Association of Administrative Professionals (IAAP), Sane Spaces, and the National Association of Productivity and Organizing Professionals (NAPO).

For more information about Julie and All Things Admin, please visit AllThingsAdmin.com. Interested in having Julie speak at your event? Please fill out our speaker request form.

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