



*A Not for Profit Organization  
Supporting Entrepreneurship*

## CAREER PLANNING & ASSESSMENT NOTEBOOK

To know what you want, you must know who you are.

The exercises in this booklet will help you to analyze your talent, education, and work experience in order to help you clarify your short- and long-term goals. Your responses will help both of us articulate the full range of competence you have developed and your long-term goal will help identify the kind of opportunities suited to your career history and personal character.

One of the objectives of this Career Planning and Assessment Notebook is to build a new resume from the information you share, and your professional objective will be part of the material designed to introduce you to prospective partners or employers. Therefore, it is important that you be as honest and complete as possible in providing the information requested.

The second objective is to identify people who are interested in self-employment. Feeling comfortable getting to a stage where you feel comfortable can take several steps. Your answers in this notebook will help us identify if you are a candidate for self-employment.

Move through the material thoughtfully and take your time. Some of it may seem simple. This process is meant to help you effect change and change initially requires self-evaluation. Be prepared for difficulty in carefully answering those questions that may seem most simple and straightforward.

---

## Personal Data

---

Please provide your contact information:

First Name	<input type="text"/>	Last Name	<input type="text"/>	Gender	<input type="text"/>
Street Address	<input type="text"/>				
City	<input type="text"/>	State	<input type="text"/>	Zip Code	<input type="text"/>
E-mail	<input type="text"/>			Phone Number	<input type="text"/>

Additional information: *(The following items will be kept confidential and will not be used in a discriminatory manner)*

Marital Status	<input type="text"/>	Please enter your ethnic group, check all that apply <input type="radio"/> African American, African, Black <input type="radio"/> Native American <input type="radio"/> Asian American <input type="radio"/> Mexican American <input type="radio"/> White or Caucasian <input type="radio"/> Other Specify <input type="text"/>
First Language, if other than English	<input type="text"/>	
Have you been injured?	<input type="text"/>	
If you have been injured, does your injury effect your working conditions? Please explain	<input type="text"/>	
Has anyone in your family had their own business or self-employed?	<input type="text"/>	
Do you enjoy working hard and putting in long hours at work?	<input type="text"/>	

---

## Activities

---

Please list any principal activities that you enjoy or participate in outside of work, community, volunteer and family activities and hobbies in the order of interest to you.

Activity	<input type="text"/>
Activity	<input type="text"/>
Activity	<input type="text"/>
Activity	<input type="text"/>

---

## Academics

---

Where did you attend High School?

What were your favorite courses and or what did you excel in?

Did you enjoy high school?

Colleges and Universities: List all colleges/universities by name at which you have taken courses for credit

If you did not attend college check here and skip ahead to page 4- Choice of Summer Jobs

- |                         |   |                         |   |
|-------------------------|---|-------------------------|---|
| 1. <input type="text"/> | Degree?<br><input type="radio"/> yes <input type="radio"/> no | 3. <input type="text"/> | Degree?<br><input type="radio"/> yes <input type="radio"/> no |
| 2. <input type="text"/> | Degree?<br><input type="radio"/> yes <input type="radio"/> no | 4. <input type="text"/> | Degree?<br><input type="radio"/> yes <input type="radio"/> no |

If you have received a degree, indicate degree earned: Degree:

---

## Autobiography of Your Professional Life

---

Many choices and decisions have affected your education and career. Some decisions were made after much deliberation; others were less a matter of choice than a reaction to circumstances. The reasons for making some of your choices may be difficult to remember, but each of your decisions inevitably influenced those that followed.

Answer the questions below about your professional life. Focus on the important choices you have made and what factors influenced each of them. An area at the end of this section is provided if you want to reflection on the following:

---

### Choice of College

---

What influenced your decision to go to the college you attended?

Choose one, or maybe it is a combination of a few of these:

- Location - it was close and you could live at home and maintain additional responsibilities
- Economics - it was the most affordable option
- Indecision on career choice - chose to go to Jr. College to get some classes taken care of and figure out what you wanted to major in
- Parents - you really did not have a say. You went along with what your parents felt was best for you. (also, you chose to go where your siblings went)
- Research- you looked around at several colleges and made an educated decision
- Popular choice – you followed the crowd. You chose to go where a lot of your friends were going.
- Awards- you received a scholarship or some other sort of award to attend a particular school
- Recruiter/Counselor/Teacher- you received advice from an outside source or someone that you had respect for

Are you happy with your decision?

---

## Autobiography of Your Professional Life

---

Did you finish your college program and receive a degree?

If no, what prevented you from getting your degree? (Chose all that apply)

Life situation     Money     Lost interest     Expulsion     Health     Other

Do you have any additional certificates or special training?

In what area? Be as specific as possible

---

### Choice of College Major

---

What influenced your decision to choose your college major? ( Select all that apply)

Parents/other adults     Followed your areas of interest/skills     Peer pressure     Received a liberal arts degree because you could not decide  
 Testing – you took aptitude tests to help you determine direction to follow

After college, did you attend graduate/professional school?

If yes, what influenced your decision as to where you attended?

Location, it was close and you could live at home and maintain additional responsibilities     Parents     Research- you looked around at several options  
 Awards- you received a fellowship or some other sort of award to attend a particular school     Recruiter/Counselor/Teacher- you received advice from an outside source or someone that you had respect for

Continue here if you did not attend college:

---

### Choice of Summer Jobs

---

During your time off school during the summer and breaks, what kind of work did you do, and or jobs did you have?

How did you make those decisions?

Someone I knew or my parents knew found me the job     I hit the pavement going to places that I thought would be hiring and places I would like to work at  
 Took what paid me the most     Researched internships that would help me with my career direction     Stayed at school year-round to finish my degree

Please provide any other information here that was not addressed in the above questions.



---

## Work Experiences

---

---

### Choice of Career Area

---

What influenced your career choice?

- My college degree
- Took an entry level job that you were able to move up the ladder, not necessarily doing what you wanted to do
- Recruiter/counselor
- Wanted to do something where I could help people
- Wanted to serve my country
- Selected to perform this job based on my experiences (military)
- Chose this as an area I wanted to pursue and get training (military)
- Took an aptitude test and was placed in that job (military)

What influenced the geographical area in which to attend school or take a job?

- It was an area you grew up in and were familiar with
- Knew the area by living there at sometime in the past
- Wanted to be somewhere totally different from where you had lived before
- The weather/climate
- Family or friends in the area you wanted to be near
- Provided the opportunity for travel
- None of the above

Specify:

At certain points in our life, we take jobs that we decide are not a good match for us. What are some of the jobs you have had? (list)

If you have decided to leave a place of employment, indicate if any of these reasons below were determining factors.

- Did not like the kind of work you were doing
- Workload/stress
- Health/injury
- Pay
- Boss/other employees
- Location/commute



---

## Work Experiences

---

Your past experience has prepared you to take on new frontiers and new challenges. Describe your full- and part-time jobs over the last ten years, the services you performed, and the characteristics of your clients, customers, constituency, etc.

**Job Title:**

**Length of time in this position:**

**Services performed/skills obtained:**

**Characteristics of clients/customers, etc.:**

---

**Job Title:**

**Length of time in this position:**

**Services performed/skills obtained:**

**Characteristics of clients/customers, etc.:**

---

**Job Title:**

**Length of time in this position:**

**Services performed/skills obtained:**

**Characteristics of clients/customers, etc.:**



---

## Work Experiences

---

**Job Title:**

**Length of time in this position:**

**Services performed/  
skills obtained:**

**Characteristics of  
clients/customers,  
etc.:**

---

**Job Title:**

**Length of time in this position:**

**Services  
performed:**

**Characteristics of  
clients/customers,  
etc.:**

---

**Job Title:**

**Length of time in this position:**

**Services performed/skills  
obtained:**

**Characteristics of  
clients/customers,  
etc.:**



---

## Work Experiences

---

**Job Title:**

**Length of time in this position:**

**Services performed/  
skills obtained:**

**Characteristics of  
clients/customers,  
etc.:**

---

**Job Title:**

**Length of time in this position:**

**Services  
performed/skills  
obtained:**

**Characteristics of  
clients/customers,  
etc.:**

---

**Job Title:**

**Length of time in this position:**

**Services performed/  
skills obtained:**

**Characteristics of  
clients/customers,  
etc.:**





---

## Lists

---

From your work history, develop two major lists of ten items each. First, make a list of things you have done in order of competence and comfort—the things you do best at the top and least well at the bottom.  
**Competency and Comfort**

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Second, make a list of the ten things you did in terms of your enjoyment of them. List them in order of most enjoyed on top and least enjoyed on the bottom.  
**Enjoyment level of tasks:**

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

---

## Lists

---

Third, make a list of the ten things most essential to your sense of well-being. List those things you need to do to feel satisfied. Include those things most essential at the top and those less important at the bottom. These may include, for example, a certain amount of daily time involved in socializing, exercising, reading, etc.

**Most Essential to Your Sense of Well-being:**

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Last, make a list of the ten things you would like most to avoid. Start with those unpleasant things that make you lose sleep and put those things you will tolerate but prefer to avoid at the bottom.

**Would Like to Avoid:**

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	



---

## Achievements

---

Review your autobiography and various choices you have made. What would you consider to be your ten most important achievements?

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

---

## Skills

---

Identify, if you can, the underlying abilities or skills—writing, analysis, interpersonal skills—you believe were most important in achieving your success.

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.



---

## Achievements/Skills

---

Try your best to indicate how your achievements and skills were related:

---

## Characteristics You Admire

---

In a brief essay or simple list, identify the characteristics of the person or persons you most admire. These people may be related to you. But if you choose someone who works in a field other than the one you worked in, also choose someone from your field. In preparing the essay/list, think about the personal qualities that are important to you and those that contribute to your view of success.

---

## Work Environment

---

Keeping in mind the qualities of those you most admire, describe the characteristics of the environment and the type of colleagues you feel will best contribute to your personal growth and satisfaction.

Now that you have analyzed your experience, described your areas of competence, and identified your achievements, think about and describe the type of environment in which you would feel most comfortable in contributing your time.

From the above, describe what you feel would be an ideal setting for you for the next five years.

**Do you  
have goals  
for the next  
five years?**

Travel?

Learning new  
skills?

Volunteering  
your services?

Earning extra  
money?



---

## Steps to Achieving Goals

---

What intermediate stages do you feel are necessary or would be valuable to accomplish the goals you have identified?

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

---

## Missing Elements

---

What is missing from your current activity that is needed to meet the conditions of the ideal you have described? List them below:

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.



---

## Are You Ready to Start a Business?

---

The following questions will help you to assist you in evaluating your skills, experience and some personal characteristics as they relate to some of the required skills for starting your own business. Don't worry if you do not possess all of these skills. Based on your answers we can determine some next steps and what training you will need to prepare you.

If starting your own business is something that does not interest you, you can skip this page and go to the last page.

Do you think you are ready to start a business?

Have you ever worked in a business similar to what you are planning to start?

Would people that know you say you are well suited to be self-employed?

Do you have support for your business from family and friends?

Have you ever taken a course or seminar designed to teach you how to start and manage a small business?

Have you discussed your business idea, business plan or proposed business with a business coach or counselor, such as a faculty advisor, SCORE counselor, Small Business Development Center counselor or other economic development advisor?

Do you have a family member or relative who owns a business?

Do you consider yourself a leader and self-starter?

Would other people consider you a leader?

Are you willing to invest a significant portion of your savings or net worth to get your business started?

Do you have enough confidence in yourself and your abilities to sustain yourself in business, if or when things get tough?

Do you have a family member or relative who owns a business?

Do you like to make your own decisions?

Are you prepared, if needed, to temporarily lower your standard of living until your business is firmly established?

Do others turn to you for help in making decisions?

Are you willing to commit long hours to make your business work?

Would others consider you a team-player?

Do you have a business plan for the business you are planning to start?

Do you know and understand the components of a business plan?

Do you know what form of legal ownership (sole proprietor, partnership or corporation) is best for your business?

Do you know why some consider business planning to be the most important factor determining business success?

---

## Are You Ready to Start a Business?

---

- Do you know if your business will require a special license or permit and how to obtain it?
- Do you know where to find demographic data and information about your customers?
- Do you know how to compute the financial 'break-even point' for your business?
- Do you know how to compute the start-up costs for your business?
- Do you know about the various loan programs that are available from banks in your area and the SBA?
- Do you understand how a business loan can impact your credit?
- Do you know how to prepare and/or interpret a balance sheet, income statement and cash flow statement?
- Do you know why small business loans are considered more risky than loans made to large businesses?
- Are you sure your planned business fills a specific market need?
- Do you know your target market?
- Do you understand the tax requirements associated with your business?
- Do you know how to prepare a marketing strategy for your business?
- Do you know how to learn about your business competitors?
- Do you understand marketing trends in your business industry?
- Do you feel comfortable using a computer or other technology to improve business operations?
- Do you have a payroll process planned for your business?
- Do you have a customer service strategy in mind or in place?
- Do you know how to obtain an EIN (Employer Identification Number) for your business?
- Do you know if your business should have some form of intellectual property protection?
- Do you know where to obtain information about regulations and compliance requirements that impact your business?





---

---

## Resume

---

---

Congratulations! Through your own efforts, we are now ready to prepare a resume that articulates your competence and describes what you seek to gain from and contribute to a new position or opportunity.

Your survey of job titles, services, skills, etc. will be used to create a position description that conforms to your ideal situation. Feel free to embellish on any of those items below.

--	--	--	--

---

Date:

---

Signed By

We hope your efforts in completing these exercises have been helpful to you. They will help us to work more effectively on your behalf. Please complete the material and return them to us at your earliest convenience. To submit your workbook click on the Submit by E-mail button below. You can also print a copy for your records by pressing the Print form button

Thank you for your interest in working with Quidibet Strategic Ventures.

Nina Cunningham, Ph.D.  
Executive Director