

# CAREER PLAN EXERCISE

See Chapter 2 in "Move Up  
or Move On" for detailed  
instructions and  
interpretation



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**1. Select a time horizon and a destination role.**

**2. Identify 2 - 3 alternative paths which move you towards your destination.**

**3. For each path, identify roles, projects, and/or experiences needed.**

# CAREER PLAN - EXAMPLE

This is what your destination role requires.  
You need these skills to advance you  
towards your destination.



## Destination:

Finance Planning and Analysis Director

## Current role:

Financial Planning & Analysis Manager

## Time Horizon

5 - 7 years

## Other

Remain in current location.

Open to change organizations, but  
prefer to stay if possible.

Work life balance is important.

Strategy: Ensure alignment of financial planning with the organization's strategic goals. Communicate financial information and strategic recommendations to business leaders.

Financial Analysis. Analyze operational performance and identify opportunities for cost savings and efficiency improvements. Use insights analysis to support operational decision-making and strategy implementation.

Forecasting and Modeling: Develop comprehensive financial forecasts to predict performance. Review scenarios and their impact on financial outcomes.

Budgeting and Reporting: Lead the annual budgeting process, ensuring accuracy. Oversee the preparation and distribution of regular financial reports to stakeholders, including insights.

Compliance and Risk Management: Ensure compliance with financial regulations and internal policies. Manage financial risks by implementing controls.

Lead a Team: Build, manage, and retain a high-performing FP+A team. Foster a culture of continuous improvement and professional development within the team.

Proven performance as Associate Director, FP+A.

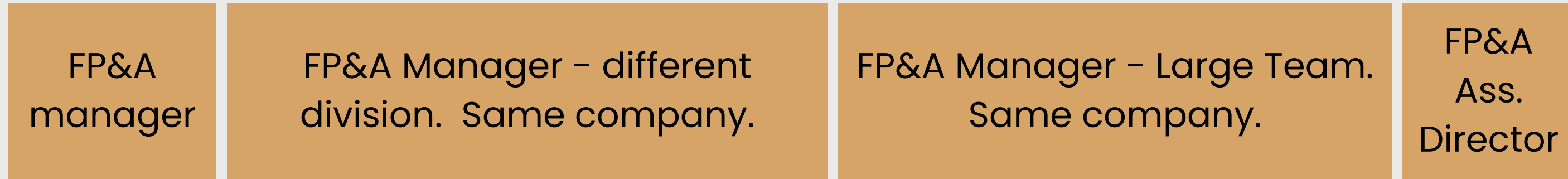
These are non role considerations, that are  
important as you look at options along your  
path.

# CAREER PLAN - EXAMPLE

Establish a stronger reputation by engaging with a broader range of leaders, especially in challenging financial environments.

Sustain expertise in FP&A while enhancing Team Leadership credibility.

This option may be slow but has low risk. FP&A roles offer gradual learning within the company.



Stand out by pursuing additional education and enhancing reputation as a strategic financial advisor.

Utilize qualification to accelerate promotion within fast growing organization.

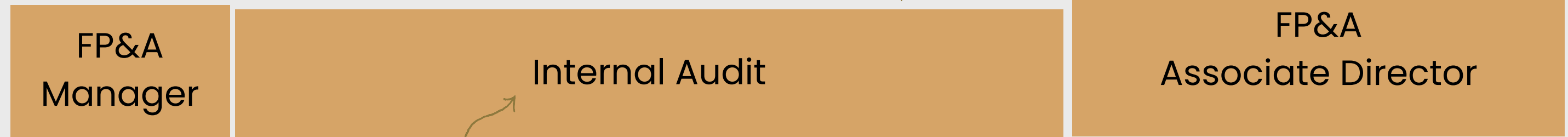
FP&A Director

This option requires investment in learning and a company move. The result is acceleration.



Stay longer in current role: display FP&A mastery

To enhance credibility in governance and identify risks effectively.



Requires a lateral move.

This choice utilizes a functional change to gain necessary experience. The lateral move ultimately facilitates a smooth transition to associate director. And you can stay in company.



TIME