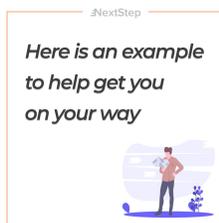


NextStep

Introducing you to... "The 5 Whys?"

Let's begin building your roadmap. We first want to determine the root cause of your current goals, motivations, and/or frustrations. "Five Whys," has been used by many companies and people as an approach to uncover your underlying drivers. It is as straightforward as it sounds. First, you **start with a goal or problem statement, and then you ask yourself "why" five times.**

Throughout this exercise, we hope to help you uncover **your internal motivator(s) and start crafting a personal mantra.**



It is time for me to... "Loosen-up: I like my job but I feel stuck"...

#1 Why? Working on the public side of finance isn't for me

#2 Why? Because it is more fun to work with private companies

#3 Why? Because it allows you to be more creative with advice and work

#4 Why? It's more fun to be creative

#5 Why? I get opportunities to think outside of the box more

Personal mantra: I'm driven when I'm able to exercise my intellectual curiosity creatively.

In your application, you said it was time for you to **"Reevaluate: My dream job didn't turn out to be what I thought it would"**. Now, it is time to ask yourself **why...**

**Feel free to use this pathway as a starting point or start with any end goal you're considering or professional frustration you're experiencing. Also, don't worry about making your Personal Mantra perfect!*

Your Five Whys?

[Insert your pathway or goal here]

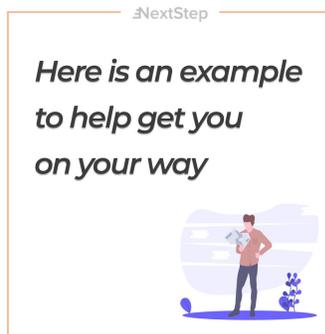
Why?	<i>[Insert answer for 1st why here] Because I have a lot of different passions</i>
Why?	<i>[Insert answer for 2nd why here]</i>
Why?	<i>[Insert answer for 3rd why here]</i>
Why?	<i>[Insert answer for 4th why here]</i>
Why?	<i>[Insert answer for final why here]</i>
Personal Mantra	<i>[Insert personal mantra here]</i>

NextStep

Introducing you to... Motivators vs. Pressures

It's time to identify and list all of your internal motivators and the external pressures in your life, be it from society, family, or yourself. With the Five Whys, you have uncovered your internal motivators and have created your personal mantra. We're taking that exercise a step further!

Now, begin to list your **internal motivators** (hint: think of these as the must haves for you to be happy and fulfilled in work or life). Next, you'll list your **external pressures** (hint: think of these as the list of things you're supposed to do to be successful and happy).



Internal Motivators

- Being creative
- Continue to learn and be challenged
- Being part of a team
- Environments that you can be proactive
- Making social impact

External Pressures

- Keep a comfortable, stable job
- "If you want a good work-life balance you live a life of mediocrity"
- "Stick with what you're good at" / stay in finance

Now, time for you to disentangle your **internal motivators** and your **external pressures**.

Your Internal Motivators and External Pressures

Internal Motivators

- XXXX
- XXXX
- XXXX
- XXXX

External Pressures

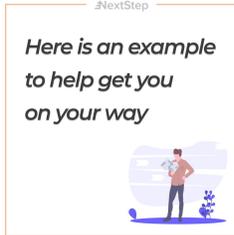
- XXXX
- XXXX
- XXXX
- XXXX



Isn't it great to get those on paper? When you look at your two columns, what do you see? Do you feel like you have a hard time committing to your internal motivators all the time? If so, you should check out [Essentialism](#) by Greg McKeown. The book discusses how to pair your life down to the essentials to avoid spreading yourself too thin when reacting to external pressures.

NextStep

Imagine a life where you were able to do work that addressed 100% of your internal motivators. It likely looks pretty amazing right? So, we want to ask you, “What scares you about focusing on your “internal motivators” vs. your “external pressures?” or better stated ...



“What makes giving your internal motivators 100% focus scary?”

- *I would not have any money to support myself.*
- *What if I do all of the musts and still am not happy?*
- *What if I’m not good at the jobs that fulfill my internal motivators?*
- *Afraid of jumping ship too early*

Now, time for you to dig deep and write your list down. Don’t worry, everyone has fears!

What scares you from 100% focus on your internal motivators?

- XXX
- XXX
- XXX
- XXX

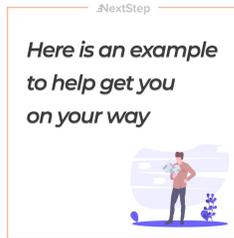


Now, that feels good! Doesn’t it? We all have internal stressors that keep us from focusing on our internal motivators. If you would like to dive deeper into the ends and outs of your internal stressors, consider taking the [Saboteurs Quiz](#) and uncover any deeper internal stressors you may be missing!

NextStep

Introducing you to... *Things You Could Do*

On top of the internal motivators and external pressures swirling around in our heads, many of us also have a list of “I could do this...” or “I could do that...” in the mental mix. In this next exercise, we’re asking you to write down all of those ‘coulds.’



Example ‘coulds’

- Go to business school in the states
- Go to business school abroad
- Climb the corporate ladder
- Could work at a startup
- Could shift to more creative role at another large company
- Could stay at current job but live somewhere else
- Get job in new field, maybe sustainability

Now, time for you to list all of your ‘coulds’!

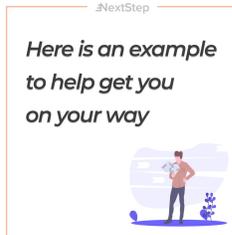
Your list of ‘coulds’

All of my ‘coulds’

- XXX
- XXX
- XXX
- XXX
- XXX

NextStep

Wow, you are moving and grooving! Let's see **how many of your internal motivators could be checked off by your 'coulds'!**



How many internal motivators can be checked off by your 'coulds'?

- Go to business school in the states (4 / 5)
- Go to business school a broad (5 / 5)
- Climb the corporate ladder: (3 / 5)
- Could work at a socially conscience start up: (5 / 5)
- Could shift to more creative role at another large company: (4 / 5)
- Could stay at current job but live somewhere else: (3 / 5)
- Get job in new field, maybe sustainability: (3 / 5)

Your turn!

How many internal motivators can be checked off by your 'coulds'?

- xxxx (# of checks / number of internal motivators)
- xxxx (# of checks / number of internal motivators)
- xxxx (# of checks / number of internal motivators)
- xxxx (# of checks / number of internal motivators)
- xxxx (# of checks / number of internal motivators)

NextStep

CONGRATS! IT'S TIME TO GET SOME FEEDBACK FROM OTHERS

These exercises are **a lot** of work, but doing this work up front should help you when you're feeling overwhelmed or stressed about choices down the road. We've found the best way to be confident about our decisions is to share our thoughts and perspectives with others. So, your next exercise is doing just that:

1. **Conversation with professionals:** Identify the top 'coulds' that align most with your internal motivators (this should be about 2-3 'coulds') and discuss each one with ~2 people (*hint: this means you should speak with ~4 - 6 people*). During these conversations, we recommend asking your interviewees based on their experience and knowledge cross check your 'internal motivators' and 'coulds'.

**Let us know if you'd like us to introduce you to anyone in our network*

2. **Conversation with "risk takers" to address fears:** Identify an additional 2-3 people who you view as "risk takers" that followed their "internal motivators" to understand how they addressed their fears.

Feel free to use the below space to capture your notes / takeaways.

[Insert takeaways here]

NextStep

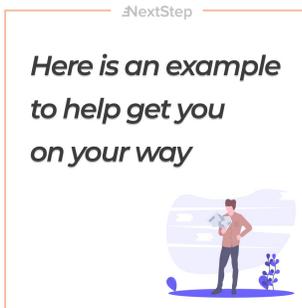
[Insert takeaways here]

NextStep

Introducing you to... Scenario Building

Now that you have fleshed out your 'coulds,' it is time to dig deeper. Based on your conversations, **which two 'coulds' are you most interested in pursuing?** The choice is yours, and it is time to choose (don't worry there is no right or wrong)! Imagine your life in ten years. **In a story or a series of bullets, describe what your life looks like since you embarked on that "could."**

Potential "building block" questions include:



- What have you accomplished?
 - What is still on your list of accomplishments?
 - What are you most proud of?
 - How has it impacted you personally?
 - How has it impacted your friends and family?
 - How has it impacted you financially?
 - How has it impacted you professionally?
 - Where are you living and where have you lived?
- How are you feeling? What are you excited about now that you've completed that must?
 - What are you nervous about or scared of now?

Your turn!

Scenario #1: What is your story in 10 years time?

[Insert 'Could' here]

[Insert Story here]

Scenario #2: What is your story in 10 years time?

[Insert 'Could' here]

[Insert Story here]

NextStep

Introducing you to... Your Future Milestones

Determining Focus

Scenario <i>[Insert Scenario here]</i>			
What do I need to be doing...	Professionally?	Personally?	Financially?
10 yrs (Scenario actualized)	<i>[Insert answer here]</i>	<i>[Insert answer here]</i>	<i>[Insert answer here]</i>
5 yrs (Having traction)	<i>[Insert answer here]</i>	<i>[Insert answer here]</i>	<i>[Insert answer here]</i>
1 yr (Gaining momentum)	<i>[Insert answer here]</i>	<i>[Insert answer here]</i>	<i>[Insert answer here]</i>

NextStep

Introducing you to... *Implementation*

You are ready to go and it is time to officially connect with your A-Team (if you haven't already) to build personal checkpoints to advance your **re-constructed "I want to be ___" statement** from resume makeovers to personalizing your pitch. Below are some sample checkpoints to get on your way, but **your career journey is 100% customizable to you and your A-team is here to help support, guide and listen to you along the way!**

<i>Career Oriented Implementation Support</i>	<ul style="list-style-type: none">● <i>Personal pitch development</i>● <i>Resume review</i>● <i>Cover letter review</i>● <i>Linked-in review</i>● <i>Interview prep</i>
<i>Job Search Support</i>	<ul style="list-style-type: none">● <i>Upskill requirements</i>● <i>Job search support</i>
<i>Skills Support</i>	<ul style="list-style-type: none">● <i>Leadership and project management</i>● <i>Communication and negotiation</i>● <i>Networking</i>● <i>Copyrighting and storytelling</i>● <i>Data driven decision-making</i>
<i>Financial Guidance</i>	<ul style="list-style-type: none">● <i>Financial planning</i>● <i>Benefits review</i>● <i>Investing</i>
<i>Organization & Habit Building</i>	<ul style="list-style-type: none">● <i>Prioritization and decision making</i>● <i>Routines</i>

#Goodluck #Havefun,
Your NextStep Team!