

## TOOLKIT

### PERSONAL DEVELOPMENT AT THE WORKPLACE

#### TOOLKIT TEMPLATE:

Personal development at the workplace

1. **Name of the Activity:** Career Transition Challenge
2. **Objectives:**
  - To strategize and make decisions to help the main character successfully navigate career transition
  - To cultivate adaptability and creativity as participants explore innovative solutions tailored to the unique circumstances presented in each case study.
  - To familiarize participants with online collaboration tools like Zoom and Miro, enhancing their ability to work in virtual environments, which is especially relevant in today's digital workspace.
  - To bridge the gap between theoretical knowledge and real-world application by incorporating case studies that reflect common career transition scenarios, making the learning experience relatable and practical.
  - To let each group of participants, lead the main characters take a thoughtful and informed decision of what career path they need to follow in the future
3. **Target Group / Group Size:**

Young adults aged 20-30 / 15-20 participants
4. **Duration:** 2+ hours
5. **Materials Needed:** Online working environment (Zoom, Miro etc.)
6. **Instructions (Step-by-Step Implementations):**

Introduction (5 minutes):

Welcome participants and introduce the objective: helping navigating a career transition.

Icebreaker Activity (10 minutes):

Each participant comes up with one truth and one lie. Then participants have to guess which statement was false.

Role assignment (10 minutes):

Group formation: Divide participants into small groups of 5 people.

In each group, assign roles to participants:

Main Character, Career Coach, Skill Advisor, Networking Expert, Financial Planner.

Each group of participants gets one case study and a set of character prompts (refer to key point 9).

Research (15 minutes):

In the assigned groups, do a brief research on the responsibilities of each player. What issues they need to focus on to meet the target and make the main character make an informed decision.

Discussion Rounds (40-60 minutes):

Round 1: Identifying Challenges and Opportunities:

MC presents his situation and concerns to the group.

Round 2: Skill and Knowledge Acquisition

Participants brainstorm and discuss how MC can acquire the necessary skills.

Round 3: Building a Professional Network

Networking Expert suggests strategies for MC to connect with professionals.

Round 4: Financial Planning and Risk Management

Financial Planner discusses ways MC can manage the financial risks of a career transition.

Round 5: Crafting a Career Transition Strategy

Career coach helps to summarize and synthesize the advice received from other group members.

Presentation and Evaluation (20 minutes):

After all groups have finished discussions, facilitate a feedback on the different strategies.

**7. Suggestions or Tips for Facilitators:**

- Prepare clear role descriptions for each participant to ensure focused discussions.
- Keep time limits for each discussion round to ensure a smooth flow.
- Encourage active participation and collaboration within groups.
- Provide guidance if groups face challenges in developing strategies.
- Foster an open and respectful environment for sharing ideas.

**8. Debriefing and Evaluation:**

- To what extent was the research phase and the background information beneficial in preparing you for the discussion rounds?
- Did the activity encourage collaboration and teamwork within the breakout groups? How did your group work together?
- What challenges did you encounter in performing your roles and putting yourself in the shoes of each character?
- To what extent is the role-play game relatable to real life experiences?

**9. Annexes:** Case study handouts, sample role descriptions

**Case Study 1:**

Sam's Story:

Sam always wanted to have his own shoe factory. He had a great plan and saved up money for it. But a big money problem happened called a financial crisis, and he lost a lot of his money. When Sam was young, he used to teach math to others.

What's Happening:

Now, Sam has to think about what to do because he doesn't have enough money for his shoe factory. He remembers that he used to teach math to people. He's wondering if he can use his maths skills to make money.

Thinking About:

Sam is thinking about whether he can start teaching Maths again to earn money. This would be different from his shoe factory dream, but it might help him get money back.

### **Case Study 2:**

Ted's Story:

Ted is 23 years old and his family has a lot of money. Until now, Ted never had a job or thought about working. But now, his parents say he needs to find a job. Ted can choose between working a little bit while studying at a university or working a lot as a taxi driver.

What's Happening:

Ted never needed a job because his family had money. But now his parents want him to learn about working and earning money on his own.

Thinking About:

Ted is trying to decide if he should go to a university and work a little bit or if he should work a lot as a taxi driver. This is new for him because he never worked before.

### **Case Study 3:**

Sarah's Story:

Sarah was a great athlete who swam in big competitions. But, when she was 24, she got hurt and can't swim anymore. She has some money saved and she wants to learn chemistry to become a biologist. But studying will take four years. She's thinking about finding a job part-time or maybe even starting a small business.

What's Happening:

Sarah was a swimmer, but she got hurt and can't swim anymore. She wants to learn about science now. But it will take a long time, and she doesn't have a lot of money.

Thinking About:

Sarah needs to figure out how to pay for studying and living while she learns science. She's thinking about getting a job part-time or maybe starting a small business to help her.

### **Case Study 4:**

Elisa's Story:

Elisa worked as a software engineer for three years. But now, she wants to talk to people more and have a different job. She lives where people speak different languages, but she only knows one language.

What's Happening:

Elisa used to work with computers, but she wants a new job where she can talk to people more. She also lives where people talk in different languages.

Thinking About:

Elisa is thinking about how she can still use her computer skills while getting a job where she

talks to people. She knows only one language, so she's thinking about jobs where that one language is enough.

Role descriptions:  
Career coach

- Listen carefully to the main character's situation and what decision they have to make.
- Give ideas about what jobs could be a good fit for them.
- Help them think about how to find job openings and how to show their skills to employers.

Skill advisor

- Find out what skills the main character already has and what they need to learn.
- Talk about different ways they can learn, like online classes, videos, or workshops.
- Help them see how their current skills can be used in their new career.

Networking expert

- Give tips on how to introduce themselves to others in their desired career.
- Talk about places where they can meet professionals, like events or online groups.
- Help them see that building relationships can help them find job opportunities.

Financial Planner

- Help them understand how their finances might change when they switch careers.
- Talk about budgeting, saving, and planning for any financial challenges.
- Share ideas on how they can manage the financial risks of changing careers.
- Assess the current financial situation.

Understand the extent of financial loss due to the financial crisis. Analyze the remaining assets, savings, and any existing debts.

- Work with the MC to create a detailed budget that outlines his monthly expenses such as rent, utilities, groceries, etc.

Identify in which areas, MC spends the most and where he can cut the unnecessary expenses.

- Debt management

If the MC has any outstanding debts, advise your client to implement a plan to manage them and pay them off strategically while focusing on his/her career transition.

- Alternative income sources.

Discuss potential part-time jobs or freelance opportunities for the MC in order to increase his/her income.

Evaluate the pros and cons of the income potential of these alternatives and decide whether they are necessary or not.

- Saving and Retirement Planning

To save and continue contributing to retirement accounts to maintain a long-term saving perspective.

**Useful prompts for each case to help facilitate interaction and understanding of the role:**

SAM

Career Coach:

- Listen carefully to Sam's situation and what decision he has to make.
- Provide ideas about what alternative career paths could be a good fit for Sam considering his math teaching skills.
- Help Sam think about how to find job openings related to teaching math or other relevant areas.
- Advise Sam on how to showcase his teaching skills and math expertise to potential employers, even if the job is different from his original plan.

Skill Advisor:

- Find out what skills Sam already possesses from his previous ventures and experiences.
- Discuss various ways Sam can refresh and enhance his math teaching skills, such as taking online courses, attending workshops, or volunteering.
- Help Sam identify transferable skills from his previous entrepreneurial efforts that could be valuable in a different career, like communication or problem-solving skills.

Networking Expert:

- Give Sam tips on how to introduce himself to others in the teaching or education field.
- Suggest places where Sam can meet professionals, like education-related events, workshops, or online forums.
- Help Sam understand that building a network of contacts in the education sector could lead to potential job opportunities, collaborations, and valuable insights.

Financial Planner:

- Help Sam understand how his financial situation might change when he shifts from pursuing his own shoe factory to teaching math.
- Discuss budgeting strategies to make the most of his available resources while he transitions his career.

- Share ideas on how Sam can manage financial risks associated with changing careers, such as finding part-time teaching opportunities or freelance math tutoring to supplement his income.

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## TED

### Career Coach:

- Listen attentively to Ted's situation and his need to choose between university studies and working as a taxi driver.
- Offer insights into the potential benefits and challenges of both options.
- Guide Ted in exploring different job roles that align with his interests and future goals.
- Assist Ted in understanding how each choice could impact his long-term career prospects and personal growth.

### Skill Advisor:

- Discover the skills Ted has developed through his education and personal experiences.
- Discuss ways Ted can leverage his existing skills in various work environments, be it in a university setting or as a taxi driver.
- Help Ted recognize that skills like communication, time management, and customer service can be valuable in any job he pursues.

### Networking Expert:

- Provide Ted with advice on how to present himself when interacting with professionals in different fields.
- Suggest ways Ted can connect with individuals who have experience in both university education and the taxi industry.
- Encourage Ted to participate in industry-related events or online groups to expand his network and gain valuable insights.

### Financial Planner:

- Explain the potential financial implications of each choice Ted is considering, including costs related to university education and taxi driving.
- Discuss budgeting strategies that align with Ted's chosen path, whether it involves managing study-related expenses or saving up for taxi-related expenses.
- Offer ideas on how Ted can financially prepare for the transition, including considerations for income stability and potential career growth.

Absolutely, here are practical prompts and examples for the responsibilities of each role based on the provided case studies:

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## SARAH

### Career Coach:

- Listen attentively to Sarah's aspirations and her situation after her swimming injury.
- Offer insights into potential career paths within the field of biology that align with her interests and expertise.
- Help Sarah explore options for part-time jobs or small business ventures that could support her studies and living expenses.

- Assist Sarah in understanding how her biology studies might lead to fulfilling job opportunities in the long run.

#### Skill Advisor:

- Explore the skills that Sarah gained from her time as an athlete and identify transferable skills to the field of biology.
- Discuss how Sarah can leverage her strong work ethic, discipline, and determination in her studies and potential future career.
- Suggest ways Sarah can continue learning about biology outside of formal education, such as online courses or joining relevant communities.

#### Networking Expert:

- Advise Sarah on building connections within the biology community, even before completing her studies.
- Suggest ways Sarah can engage with professionals in her desired field through online platforms, forums, or local events.
- Help Sarah see the benefits of networking, such as gaining insights into the industry, accessing potential mentors, and discovering job opportunities.

#### Financial Planner:

- Assist Sarah in creating a financial plan that considers her studies, living expenses, and potential income from a part-time job or small business.
  - Discuss strategies for budgeting and managing her finances effectively while pursuing her studies.
  - Share ideas on how Sarah can minimize financial risks during her career transition, such as finding scholarships or grants related to biology studies.
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### ELISA

#### Career Coach:

- Listen attentively to Elisa's desire for a career change and her preference for more interpersonal roles.
- Provide insights into potential career paths that allow Elisa to interact with people while still utilizing her computer skills.
- Guide Elisa in researching roles that require computer skills and communication, like technical sales or user experience (UX) roles.

#### Skill Advisor:

- Explore Elisa's software engineering skills and identify how they can complement her desire for a more people-focused role.
- Discuss ways Elisa can expand her skill set to include skills relevant to roles that involve more interaction, such as communication workshops or courses on effective interpersonal skills.

#### Networking Expert:

- Advise Elisa on connecting with professionals who have successfully transitioned from technical roles to more interpersonal ones.

- Suggest joining professional networks or attending events that cater to individuals interested in combining technical expertise with communication skills.

Financial Planner:

- Help Elisa evaluate potential financial implications of transitioning to a new role, considering factors like salary expectations and additional skill development.
- Discuss budgeting strategies that allow Elisa to invest in courses or workshops to enhance her communication abilities.
- Share ideas on how Elisa can ensure financial stability during the transition, such as saving a buffer fund before making the career change.

These prompts and examples can help each role in the workshop contribute meaningfully to the discussions and support the main character's career transition journey.

### **Information about the financial situation of the main character:**

#### **CASE 1:**

Expenses list:

Housing Expenses:

Rent or mortgage payment: \$1,200

Utilities (electricity, water, gas): \$150

Internet and phone: \$80

Transportation:

Public transportation or gas: \$100

Car insurance and maintenance: \$75

Food and Groceries:

Groceries and dining out: \$300

Healthcare and Insurance:

Health insurance premium: \$250

Medical expenses and prescriptions: \$100

Entertainment and Leisure:

Entertainment (movies, outings): \$500

Hobbies and activities: \$50

Miscellaneous Expenses:

Clothing and personal care: \$500

Gifts and special occasions: \$50

Emergency Fund:

Amount on the bank account: \$0

Total Monthly Expenses: \$3,355

Monthly Income as a Math Tutor: \$3,333 (estimated)

Remaining Income After Expenses: \$0;

#### **CASE 2:**

Expenses list:

Housing Expenses:

Rent or mortgage payment: \$3,000



Utilities (electricity, water, gas): \$400  
Internet and phone: \$80  
Transportation:  
Public transportation or gas: \$0  
Car insurance and maintenance: \$300  
Food and Groceries:  
Groceries and dining out: \$1500  
Healthcare and Insurance:  
Health insurance premium: \$400  
Medical expenses and prescriptions: \$100  
Entertainment and Leisure:  
Entertainment (movies, outings): \$2000  
Hobbies and activities: \$50  
Miscellaneous Expenses:  
Clothing and personal care: \$1200  
Gifts and special occasions: \$600  
Emergency Fund:  
Amount on the bank account: \$4000  
Total Monthly Expenses: \$15,530  
Monthly Income as a Taxi Driver: \$4000 (estimated)  
Remaining Income After Expenses: \$-11,530;

### **CASE 3:**

Housing Expenses:  
Rent or mortgage payment: \$0(3 room apartment)  
Utilities (electricity, water, gas): \$100  
Internet and phone: \$120  
Transportation:  
Public transportation or gas: \$0  
Car insurance and maintenance: \$150  
Food and Groceries:  
Groceries and dining out: \$400  
Healthcare and Insurance:  
Health insurance premium: \$200  
Medical expenses and prescriptions: \$200  
Entertainment and Leisure:  
Entertainment (movies, outings): \$200  
Hobbies and activities: \$50  
Miscellaneous Expenses:  
Clothing and personal care: \$400  
Gifts and special occasions: \$60  
Emergency Fund:  
Amount on the bank account: \$0  
Loan in the bank:  
Liabilities to the bank: \$20000(for the apartment)  
Monthly interest payments: \$400  
Total Monthly Expenses: \$2,280  
Cost of university degree: \$4,000

Expected starting salary as biologist: \$3,000

**CASE 4:**

Housing Expenses:

Rent or mortgage payment: \$0(1 room apartment sharing with sister)

Utilities (electricity, water, gas): \$60

Internet and phone: \$70

Transportation:

Public transportation or gas: \$60

Car insurance and maintenance: \$0

Food and Groceries:

Groceries and dining out: \$200

Healthcare and Insurance:

Health insurance premium: \$100

Medical expenses and prescriptions: \$100

Entertainment and Leisure:

Entertainment (movies, outings): \$100

Hobbies and activities: \$300

Miscellaneous Expenses:

Clothing and personal care: \$600

Gifts and special occasions: \$50

Emergency Fund:

Amount on the bank account: \$25000

Total monthly expenses: \$1,540

10. **Sources of Knowledge:**

Online working environment: <https://miro.com/>

Blogs and books on career transition: <https://extension.harvard.edu/blog/5-tips-for-changing-careers/>