

**Deloitte.**

# Career Moves Guidebook



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# Deloitte career moves guidebook overview

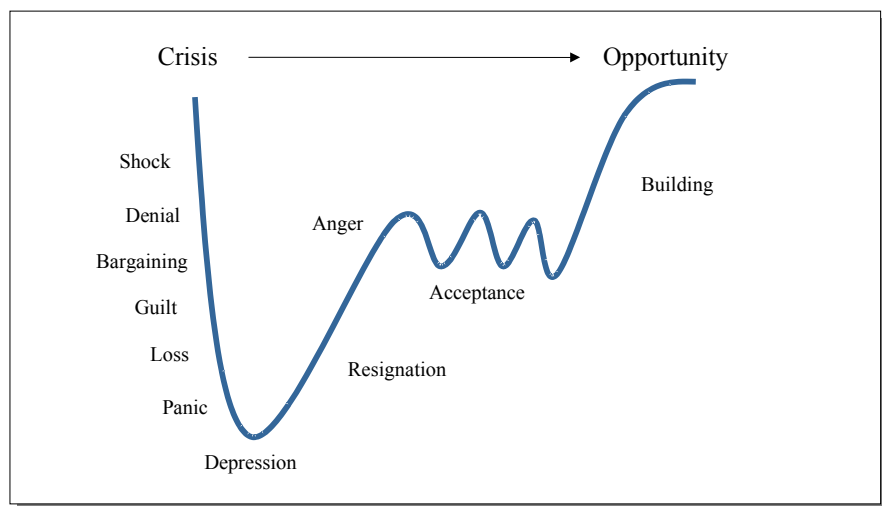
The Deloitte Career Moves guidebook is a key resource providing many of the essentials you need to jump start your job search. If you are not sure where to begin, the First Steps and Create a Job Search Action Plan sections can be great places to start. As you get more into your search, you may find yourself referencing additional sections of the guide when you need specific help with resumes, networking, interviewing and negotiation.

# First steps

It has been said that a job search is more like a marathon than a sprint. While you may want to jump into your search with both feet, it is important to take a moment to stop and get your bearings to ensure you have the energy and resources to reach your destination.

## Managing your emotions

Before you even begin to think about your search, you may find yourself dealing with some strong feelings about your current situation. Job loss can evoke a range of emotions from anger to relief to shame. Anxiety, depression, sadness, confusion and isolation may also occur; especially right after a job has ended. Mid-stage emotions typically include anger, resentment and blame. With time, these emotions will slowly be replaced with acceptance, which allows for constructive progress to take place and positive energy and momentum begins to build.



"Not in his goals but in his transitions man is great." – Emerson

As the chart above depicts, you will likely cycle through a variety of emotions and perhaps even revisit a few along the way. It is important to remember that you are a normal human being having normal reactions to an abnormal event. Learning to go with the flow of your emotional rollercoaster is the first step.

According to author Charles Maclean, 90% of the job search process is an “inside job,” which means being able to control your thoughts and emotions so they serve you. For more resources on managing your emotions, please refer to the articles in Appendix A.

## Strengthening your support system

A key to managing the stress of looking for a job is to ensure you have a support system in place. Looking for a job is hard work and the more support you have will only help you during those times when your motivation and enthusiasm for the task begins to wane. Bolster your emotional warehouse by focusing on current relationships

and building new ones. Friends, relatives, and local religious or community groups can all be great sources of support to you as a job seeker.

## Take control

Establishing a routine that creates balance between personal and career-related activities will help you stay focused for the duration of your search. While you may have heard the adage that looking for a job is a full-time job, job searching for eight hours a day is generally not sustainable for most people. Four to six hours per day spent on a variety of job search activities – including networking and researching, applying and interviewing for positions – is a realistic goal. Regular physical exercise and good nutrition will also help you stay healthy and keep a positive outlook.

This is also the time to take a look at your finances, assess your benefits situation, and research your state's unemployment programs. For links to job placement and unemployment information for your state, visit <http://workforcesecurity.doleta.gov/map.asp>.

## Consider your timeline

After assessing your financial and personal needs, you should have a sense for how long you can feasibly remain unemployed – then work backwards from there. The time it will take for you to find a new job will be impacted largely by the current job market and the relative demand for your skills. The length of your search may be increased if you decide to change industries or careers and you will have to weigh whether you can afford to wait for your dream job or if the need for more immediate employment requires you to change your approach.

For most people there are two key dates: the first is when the financial pain first appears (often when severance runs out) and the second is when the financial burden becomes significant and requires major sacrifices. Deadlines may not always be financial and can have just as much to do with an emotional sense of how long you feel you can remain unemployed. As you draw close to your deadline, you may need to revisit some aspects of your plan and develop alternative solutions.

# Creating a job search action plan

Following is a “roadmap,” which highlights the journey you will undertake to reach your next career destination. While every search is different, the following steps provide general guidance you’ll find helpful when developing your own job search plan.

## Creating your job search filters

The start of any good job search begins with a thorough self-assessment. Looking for a new job is a great opportunity to reflect back on your past work experiences, to determine what worked and what did not, and to realign your goals for the future.

This introspection creates “filters” you will utilize throughout the search process to keep focused on what is important to you. These “filters” can help you market yourself appropriately, prioritize your time, focus on the right targets, prepare meaningful interview questions and make well-informed offer decisions. Spending time on these filters at the beginning of your search will bring value throughout your search.

Ask yourself the following questions:

- What skills do I most enjoy using? Which do I enjoy least? What are my key strengths?
- What are my personal and professional goals for the next few years? Five years? Ten years?
- What are my values? What guides me as I make decisions? What do I need and what level of importance do I place on factors such as:
  - With what types of people do I like to work?
  - What type of working conditions do I prefer?
  - What type of organizational culture and values are important to me?
  - What level of responsibility do I hope to undertake in an organization? What are my goals for career advancement?
  - What are my compensation, travel, overtime and commuting requirements?

Your responses to these “creating the filter” questions are extremely valuable not only when deciding what types of positions to target in your initial job search strategy, but also later when making a decision on job offers. The goal is to understand what is important to you and then to hold yourself accountable in meeting as many “filters” as possible when selecting a job.

## Research your options

Now that you have established your sense of purpose, core skills, and interests, you will need to do some research to broadly explore the industries, jobs, and organizations that might be a good fit. This process can include:

- Matching your preferred skills, abilities and experience with actual job titles

- Identifying possible careers, industries and companies
- Educating yourself on career paths, opportunities for advancement, and educational requirements
- Performing market analysis for your chosen field, including potential salaries, future demand and impact changes in the economy may create
- Networking and informational interviewing to gain perspective on the opportunities

After you perform a realistic assessment of how you fit into the industries, organizations, and roles that interest you, you should narrow down your job options. Determine your top priorities along with those you will pursue as a back-up plan.

## Create your marketing materials

Now the real fun begins. It is time to begin marketing your number-one product...you! To help plan your marketing strategy, think about the following:

- What is your product? What do you have to offer?
- What differentiates you from other candidates?
- What is your value in the marketplace?

A resume, cover letters and a 30-second Elevator pitch are just some of the marketing tools you will use. It is time to begin to put together the documents and information you will need for your search. It is important to have these tools done and ready to go in order to ensure you can react to opportunities as they arise. Some important steps in preparing your marketing toolkit include:

- Update your resume
- Prepare and practice your “elevator speech”
- Draft a cover letter template that can be modified as needed
- Identify references
- Prepare salary history

See the Resume and Job Search Correspondence sections for guidance on creating these materials.

## Develop your search methodology

Develop a plan that includes effective use of the three main search channels: Networking, Search Firms and the Internet. Your plan should address overall strategy, specific goals and deadlines – all tailored to meet your individual needs and working style.

## Prepare for job interviews

For information on how to conduct a successful interview, see the Interviewing section. This is also a good time to consider your compensation strategy. Understand the components of compensation – what can be negotiated, the tangible and intangible benefits, your minimum requirements, and how to create a win-win situation between you and your prospective employer. For more help, see the Offers and Negotiations section.

## Implement the plan and make adjustments as necessary

Now, it is time to put your plan into action!

- Continue to actively build your network, creating and discovering new opportunities
- Refine your goals and search criteria, based on research and feedback from networking activities
- Identify and act upon job postings

- Write cover letters and send out resumes
- Build and strengthen your support system to help maintain focus and energy

As you move your action plan forward, try to get feedback whenever possible to make mid-course corrections and improve your results. Ask for feedback from those who interview you, mentors, and friends. Incorporate the constructive lessons you take from them to improve your approach. Ask yourself:

- What is working?
- What was working and now needs to be revised?
- Where can I improve?
- What help or advice do I need?

Remember to celebrate your wins and give yourself credit for what you have accomplished so far. Whether you have made just one new contact, gotten called for a second interview, or have become more comfortable with your interviewing skills – be proud of your achievements and hard work!



# Building a resume

## Purpose of the resume

By definition, “A resume is a written document that lists your work experience skills and educational background. It is used as a marketing tool for job seekers.” (www.careerplanning.about.com). Your resume is one of the most important elements of your job search. It is your opportunity to market yourself to potential employers. It should be used to open doors and make the potential employer want to invite you in to discuss your background. If written correctly, it will create an interest in you and give you the advantage when given the opportunity to interview.

The purpose of a resume is to:

- Accurately and positively describe your work experience, skills and interests (tell your story)
- Secure you an interview

A good resume can get you in the door – a bad resume can keep you from interviewing.

## Guiding principles for writing your resume

While the definition of a good resume can be somewhat subjective, most successful resumes follow these common guidelines:

- Always be truthful with the information you put on your resume. Present yourself accurately and positively
- Do not share too much. Your resume should read like a billboard, not an encyclopedia. A good resume should leave the prospective employer with a desire to know more
- Past performance is an indicator of future performance. Explain how you made a past employer money, saved them money or improved a process, product or staff
- Use brief, but descriptive, statements. Often, bullet points best serve this purpose, but short, concise paragraphs can also be appropriate
- Tailor the resume for the job for which you are applying – create one core resume and then customize it for different career goals or targets and your related knowledge, skills and abilities
- Ensure your resume is easy to read and comprehend – remember, an employer should be able to easily scan through your resume in about 30 seconds
- Make sure your resume will copy and fax well. Do a “hard copy printout” test
- While traditional advertising catches the eye with colors, unusual fonts and pictures, there is no place on your resume for these. Utilize the KISS (Keep It Simple Sweetie) rule. Stick to one format, font and please leave the picture off
- Solicit feedback from trusted colleagues

## Getting started

Before you begin writing your resume, you will need to do some basic preparation work:

- Determine the specific format of the resume
- Determine the content of resume and review for relevancy (see resume content later in this section)
- When considering your job description/s, remember the action, cause and effect rule

- Research the company to which you are applying
- Find out as much about the position and requirements as possible
- Compose your candidate profile: the key characteristics or traits that you will bring to a new employer, the most important skills you can bring to a new employer, the most relevant experience for your new position

## Resume formats

There are three basic styles of resumes:

- Chronological – Lists job history in reverse chronological order
- Functional – Lists experience by functional area followed by brief listing of work history
- Narrative – Tells the story of the executive’s accomplishments and is longer than typical resume. This style is not recommended for the typical job seeker – save the narrative for the interview

## Chronological resumes

The most common type of resume, and the style that recruiters and employers prefer, is the chronological resume. The chronological resume lays out your work experience by employer and job title in reverse chronological order – your most recent experience is presented first and previous jobs are listed going back in time. The information on the following pages is focused on guiding you through the process of building a chronological resume.

Resumes are composed of several standard sections and some optional sections. In other words potential employers expect to see certain things on your resume and may not necessarily expect others.

Standard	Optional
Heading – name, contact information	Summary
Professional Experience	Job Objective
Education	Professional Affiliations
Skills – technical, language, etc.	Publications and Presentations
	Certifications
	Relevant Volunteer or Community Service Work

## Standard resume elements

### Heading

This is the very first section of the resume and should include:

- Your name
- Your address
- Your telephone number(s)
- Your personal e-mail address
- Your fax number (if applicable)

The heading section is often a good place to be creative with fonts and layout. Graphics and photos are generally not recommended for inclusion in the header. Be sure that your personal e-mail address sounds professional – avoid using addresses such as [iamcool@hotmail.com](mailto:iamcool@hotmail.com) or [pickme@yahoo.com](mailto:pickme@yahoo.com).

When posting your resume to job boards, delete your address and telephone numbers from your heading and leave only your name and e-mail address. This will provide recruiters enough information to contact you while

protecting your safety. If you are going to post a confidential resume and attach a word format of your resume, please take personal information off your word document and rename it Confidential Resume.

## Professional experience

This is the meat and potatoes of your resume. This section should include information on full and part-time jobs, as well as any other experience relevant to the position you are pursuing (e.g., internships, freelance consulting). Here are some guiding principles:

- If you are using a chronological resume format; list your career experience in reverse chronological order, list job title, company name, geographical location and employment dates
- Include a brief description of your job responsibilities for each position. Use bullet points or short, telegraphic sentences
- Begin your bullet points with action verbs such as “managed,” “led” and “developed.” For your current position, use the present tense of the verb and for past jobs, use the past tense. For a list of appropriate action verbs see Appendix B
- Make sure your bullet points are parallel. If you start the first bullet point with a singular verb (“develop,” “generate” or “formulate”), do not start others with gerunds (“developing,” “generating” or “formulating”)
- Within each position, list your bullet points in descending order of importance
- Your most recent position, listed first on your resume, should contain the greatest number of job responsibilities and accomplishments
- Positions earlier in your career are not as important, and therefore, should take less space on your resume. Your resume should, however, highlight all positions you have held, showing locations and dates
- List specific accomplishments or achievements, such as “increased sales by 10%” and “named employee of the month” for each position you have held. If you show that you consistently produced positive results for previous employers, you will demonstrate your potential value to the prospective employer
- Don’t just tell them what you did. Move beyond that and tell the benefit of your accomplishment. A good way to do this is to include several specific ways you helped your employer make money or save money. Identify measurable results; use numbers. Remember, the only benefit you can bring to the table is past performance. When you interview (either phone or in person) this is what will be discussed

When determining what accomplishments to emphasize for each of your job roles, ask yourself these questions:

- Did I solve any challenging problems and what was the result?
- Did I implement any procedures to improve efficiency?
- Was I part of a team that was recognized with awards or accolades?
- Was I known for fast and accurate work output?
- Did I receive any awards, special recognition or promotions as a result of my work?
- How did the company benefit from my performance?

## Education

If you are a college graduate or have less than five years work experience, your education is one of the most important things you have to offer a potential employer and so your education section should be listed before your work experience. If you have substantial professional experience, your education section should follow your work experience section.

List your highest degree first and follow with other degrees, in reverse chronological order. Each listing should include:

- Degree and major.
- Name and location of school.

- Date obtained.
- If you are submitting your resume while still working on your education, write “expected graduation date of month, year”
  - If you have significant work experience (10 years or more), consider leaving your graduation date off your resume
- Awards and scholarships (if relevant)
- GPA (if you have been out of school less than three years and it is 3.0 or better)

Do not list high school education if you have a college degree or have more than seven years work experience. If you began work toward a degree but did not complete it, you may list the name of the school, the degree you were pursuing and the number of credit hours completed.

## Skills

Sometimes the Work Experience and Education sections do not capture everything you have to offer. The Skills section can help convey this additional information, and can include:

- **Language skills:** Indicate fluency level by using words such as proficient and conversant. Be sure to specify the language(s) you read, write, and/or speak and your fluency in each. For example, “Proficient in conversational and written Spanish”
- **Software skills:** Companies expect computer literacy. List software with which you are familiar. Remember to list the basics such as word processing, spreadsheet and presentation software experience and Internet experience
- **Technical computer skills:** If you have deep technical expertise, list relevant hardware, software and other technical capabilities. For example, “Proficient in C++, SQL and Java”
- **Other relevant skills:** You can include skills learned in internships, jobs, team activities, and leadership roles. List skills you can perform with little or no direction

Some people include soft skills here, such as teamwork, flexibility and interpersonal skills. These are rather subjective attributes (how do you prove you are flexible?) and you may want to think twice before including them in this type of list. Rather, your soft skills should be embedded in your work responsibilities and accomplishments. For example, if you consider yourself a strong mentor, instead of listing mentoring as one of your skills, include a bullet point in your work responsibilities section. The bullet might read, “Mentored seven junior staff members and received mentoring award for contributions.”

## Optional resume elements

### Summary

A summary statement is a one- to two-sentence overview that captures the essence of your skills and experience. It highlights what makes you a qualified candidate as well as what makes you different (and better) than other applicants.

Because resumes are often quickly skimmed, it is critical your resume gets right to work selling your credentials. An effective way to showcase your key qualifications is to include a Career Summary or Summary of Qualifications statement at the top of the first page. Your Career Summary should include brief information on your experience and key strengths, which tells a prospective employer what you have to offer and how you can help achieve their goals. The remainder of your resume should back up the statements made in the summary. Remember, first impressions are lasting impressions – make sure your summary is concise and persuasive.

## Objective

Having a clearly defined career objective in mind can help you write a resume that effectively conveys your experience, skills and training in order to best serve your overall professional aspirations.

It is important for your resume to include a clear career goal to set the stage for the remainder of the resume. However, you do not necessarily have to communicate it through an Objective section. If you are on a steady career track, you can incorporate your objective into a summary (see above).

On the other hand, those that are looking to change career paths should consider explicitly incorporating their objective into their resume, because their goals may not be clearly defined by their work history alone.

When writing an objective:

- Focus on how you would benefit the employer, not on how the employer would benefit you
- Avoid statements that say nothing substantial about your career goal (e.g., “seeking a challenging position with opportunity for advancement”)
- Keep it concise and targeted. The best objectives contain a desired job title or target

## Professional affiliations

Memberships in professional affiliations indicate an interest in keeping up-to-date on the latest issues and trends impacting your profession. List any professional associations or organizations of which you are a member. If you have held any leadership roles, such as a committee chair, indicate that as well. Membership in college or university alumni associations are typically not appropriate for this section, unless you have held significant leadership roles.

## Publications and presentations

Developing thought leadership pieces on topics impacting your profession, whether an article, book or presentation at a conference, demonstrates that you have developed a deep expertise in your field through research and/or experience. In this section, list the title and dates of all publications you have authored (or co-authored) and outside presentations you have delivered.

## Certifications

Devoting the time and effort to receive a certification related to your profession shows dedication and commitment to your professional development. List any certifications you have earned and, if they expire, the expiration date.

## Volunteer or community service work

In this optional section you can list volunteer or community service work you have performed, including any leadership roles you may have held. Make sure the work is relatively recent (within the last three to five years) and demonstrates a commitment of time and effort on your part (i.e., avoid listing volunteer activities that require only a few hours of your time on an annual basis).

## Functional resume

A functional resume differs from a chronological resume by concentrating on skills you have used (e.g., management, technical, sales/marketing, etc.) that relate to your stated objective rather than on the jobs you have held. A functional resume is particularly effective if your work experience has not been closely related to your job objective, if you are changing careers, or if you are seeking a promotion. In this format, you elaborate on the skills

necessary to perform the desired job and how you have demonstrated those same skills in different types of positions. A functional resume is not appropriate for those with a solid recent track record.

While the functional resume has some advantages, as described above, there are also a couple of drawbacks:

- Most hiring professionals assume that writers of functional resumes have something to hide in their work history
- Recent accomplishments tend to get lost on a functional resume since experience is not expressed chronologically. This can be frustrating for readers who want to see a linear progression of your career

## Appearance of your resume

Here are some tips to keep in mind when looking at the overall appearance of your resume:

- Keep the format simple, attractive to the eye and easy to follow. An organized, concise layout determines whether a resume is read. Direct the reader's eye with the format. Avoid dense text, as it will discourage careful reading
- A little creativity can be good to ensure your resume does not look like everyone else's. However, too much creativity can be a bad thing. Do not use pictures or fluorescent paper to try to stand out
- Use a professional looking font that is 10 point or larger
- Utilize white space around the margins of your page to appeal to the reader's eye. Standard margins of one inch on all sides provide optimal white space. However, the margins can be adjusted slightly from the standard if necessary
- Do not overdo the use of capitals, bold type or underlined phrases
- Do not use ampersands, percent signs or foreign characters because they may not translate properly when scanned. Also, make sure that none of the characters touches another as scanners have a difficult time reading them
- **Spelling and grammar should be absolutely perfect – even one typographical error is unacceptable.** Proofread your resume meticulously and share it with a trusted colleague to make sure you have not inadvertently substituted one word for another, misspelled a word, or have punctuation or formatting errors. It is also a good practice to read your resume out loud to help catch errors you may have made. Keep in mind that your computer's spell check and grammar utilities may not catch word substitution errors (e.g., manger for manager), since the problem is one of incorrect word choice rather than misspelling
- When printing your resume, use a high-quality printer and white or off-white high quality resume paper

## Creating a concise resume

One of the top concerns individuals have when they create or update their resume is length. Not long ago, job seekers followed the resume golden rule: No resume should exceed one page. Today, however, there is no rule about appropriate resume length. As a result, you may be asking yourself:

- How long should my resume be?
- How can I fit all my experience on one page?
- What can I eliminate and what should be highlighted?

The answer is simple: Use common sense and ask yourself, "Will this statement help me land an interview?" Every word should sell you, so only include information that elicits a "yes."

If you are just graduating from college, have less than five years of experience or are considering a career change, a one-page resume will probably suffice. On the other hand, some technical and executive candidates require multiple-page resumes. In general, if you have more than 10 years of experience and a track record of accomplishments, you will probably need two pages to tell your story.

However, do not confuse telling your story with creating your autobiography. Prospective employers are inundated with resumes and are faced with weeding out the good from the bad. The first step involves quickly skimming through resumes and eliminating candidates who clearly are not qualified. Therefore, your resume needs to pass the skim test. Ask yourself:

- Can a hiring manager see my main credentials within 10 to 15 seconds?
- Does critical information jump off the page?
- Do I effectively sell myself on the top quarter of the first page?

Many people are proud of their careers and feel the information on a resume should reflect all they have accomplished. However, the resume should not contain every detail – it should only include the information that will help you land an interview. Therefore, you need to edit with a critical eye. If your college days are far behind you, it probably does not matter that you pledged a fraternity/sorority or worked at the local grocery store. The editing process can be especially difficult if you have emotional ties to your past. If you find this step difficult, show your resume to a trusted colleague for an objective opinion.

Here are eight tips to keep your resume crisp:

- **Avoid repeating information:** Did you perform the same or similar job tasks for more than one employer? Instead of repeating job duties, focus on your accomplishments in each position
- **Eliminate old experience:** Employers are most interested in what you have done recently. If you have a long career history, focus on the last 10 to 15 years. If your early career is important to your current goal, briefly mention the experience without going into the details
- **Do not include irrelevant information:** Avoid listing hobbies and eliminate outdated technical or business skills. Do not include personal information, such as date of birth or marital status, as it could be the basis for discrimination and put you and a prospective employer in a bad position
- **Cut down on job duties or project listings:** Many job seekers can trim the fat off their resumes simply by removing long descriptions of job duties or projects. Instead, focus on your most impressive accomplishments. For those who have been consultants or had other roles where projects are a key component of your work, consider creating an attachment or appendix for your resume that provides detailed project summaries. With this approach, your resume remains concise, but you preserve the project-related details that may be requested at some point in the hiring process
- **Remove “references available upon request”:** Many job seekers waste the valuable last line of the resume on an obvious statement
- **Use a telegraphic writing style:** Eliminate personal pronouns (I, me, we, us) and minimize the use of articles (a, an, the) when preparing your resume
- **Edit unnecessary words:** Review your resume for unnecessary phrases such as “responsible for” or “duties include.” The reader understands you were responsible for the tasks listed on your resume
- **Customize your resume for your job target:** Only include information relevant to your career target. This is particularly important for career changers who need to focus on transferable skills and deemphasize unrelated career accomplishments

## Resume dilemmas

### Job termination

No matter how unpleasant your termination, do not attempt to explain the circumstances on your resume. You will have a much better chance of impressing hiring managers if you deal with this question in a face-to-face interview.

Your goal is to wow your potential employer by highlighting your accomplishments and skills on your resume. When updating your resume, it can be difficult to put your emotions aside and write a strong description for the

employer that let you go. But, this is exactly what you need to do. If you are stuck, seek the opinions of colleagues who respected your work and ask them about your performance – they might remind you about contributions you made that you took for granted or forgot about.

Here are a few questions to ask yourself regarding your performance:

- Did you take on responsibilities outside your original position scope? Were you able to juggle multiple projects and duties while maintaining the highest emphasis on quality?
- What were your key contributions to your employer? In what ways did you excel at your job and how did your employer benefit from having you on board? Specific, measurable outcomes of your work have the strongest impact.
- Did you go above and beyond the call of duty? How did you contribute to bottom-line results?
- What types of challenges did you face? What did you do to overcome these challenges? How did your performance benefit the company?
- Were you part of a team that was recognized with awards or accolades? Did you receive positive commendations by your supervisors (or clients, vendors, coworkers, etc.)?

Even if hiring managers wonder why you left a certain employer, by focusing on your accomplishments, your resume should be strong enough for you to receive invitations to interviews. Then, in the interview, you can explain your situation in person.

## **Lack of educational credentials**

Some job seekers are concerned that their education does not measure up to the requirements of the position. If you do not have a degree but have been participating in ongoing training throughout your career, list your related courses, certifications, seminars, conferences, on-line learning and training in the Education section by creating a list called “Professional Development.” Recent training may end up being more valuable than a dated degree.

## **Employment gaps**

If you have gaps in your employment history, think about other activities you can use to fill the open time period. You may have experience related to your job target, regardless of whether you were paid. Volunteer activities, community involvement, special projects, consulting engagements and continuing education can be used in the Experience section.

Keep in mind that short gaps might not be apparent if you refer to your experience in terms of years rather than months. When listing dates on your resume you don't need to list the month/year if you were in a position for over a year or if your position spans multiple years. For example, you could say 2004 – 2007 (rather than May, 2004 – April, 2007) which would give you some room to cover the gaps. Use the Career Summary to showcase your top qualifications. This will draw attention to your selling points and downplay your work chronology.

You can format your resume to minimize the gaps in your employment history. For example, don't bold the dates and/or use a smaller font than the one you use for the company name or job title. Start your resume with a Summary Statement and Career Highlights section so you are highlighting your skills and accomplishments, rather than when you did what.

If you were out of work because you raised a family, continued your education, cared for a sick family member or recovered from an injury, be sure your tone is not apologetic. There is nothing wrong with being out of work and a negative attitude might affect the quality of your resume. If you have been out of the work world for an extended period of time, show how you have kept (or brought) yourself up-to-date with changes in your profession and industry.



## Job hopping

The best way to handle job hopping on your resume depends on your specific job titles and companies.

- Consider combining two or more similar positions under one heading. For example, “Internal Auditor, Acme Company and XYZ, Inc., 2/94-4/96” and then list your combined work experience highlights
- Independent contractors and temporary workers should consider grouping their experience under one-time period (such as IT Consultant/Network Specialist, 4/95-present) with project highlights
- You do not need to include every job you have ever held. Short-term positions that are not related to your career target can be omitted
- Use your cover letter to explain your work history and put a positive spin on your circumstances. Also, indicate your interest in a long-term position

Keep in mind: A resume is a marketing piece, but you will need to provide a complete work history if you are asked to fill out a job application, which is a signed legal document.

## Changing careers

It is hard for job seekers on a steady career path to get their resumes noticed, but if you are pursuing a new career path, it can be much more difficult to convince hiring managers to take a chance on you.

A common mistake career changers make is to use the same resumes that worked in their previous careers when they are pursuing a new one. Instead, resumes should be reworked to emphasize key qualifications for your new job target. The best way to get started is to research your target field to understand what hiring managers want from their workers; network with people in the industry and review job postings. Learn about the skills and other credentials that are important in your new career.

After doing your research, ask yourself the question: “Why should an employer take a chance on me?” You may not have the desired experience, but you probably have skills that are transferable from your former career, hobbies, volunteer work, etc. Write down a list of your most desirable, related qualifications – these should form the basis of your resume. Then, select the most appropriate resume format based on the type of career change you are pursuing (see Functional Resumes and Combination Style Resumes in this section).

## Long-term employment

In today’s work world, it is rare for employees to stay with one employer for an entire career. Many long-term employees ask, “Am I a dinosaur?” The answer is, of course, no. You need to present your long-term work history as a positive attribute – evidence you are in for the long haul. Recruiting a new employee is an expensive endeavor, so companies are always looking for ways to promote long-term tenure. Use your longevity, dedication, commitment, loyalty and perseverance as selling points, both on your resume and in interviews.

If you have been with a company for many years, chances are that you boast a long list of achievements. However, your resume should only present the experience, skills and training that relate to your current goal. Since a resume is a marketing piece rather than a career history, do not feel that your resume must cover every detail of your career. Edit down your experience so that you are armed with a powerful resume that is tailored to your current job target.

Obsolete skills are a sure sign of a dinosaur, so omit them. If you are not sure, ask a trusted colleague or potential hiring manager whether or not a particular skill is current in the marketplace. You can also gather this information by searching job postings – if the skill is not included in the job requirements, it should probably be omitted.

Remember that promotions illustrate that your company realized your worth and offered you more responsibility. Even lateral moves indicate your employer recognized your diverse talents. Instead of grouping all of your

positions under one heading, give your positions individual descriptions along with distinct time periods. If you have been in the same position for your entire tenure, show how you have grown in this position and made a difference to the organization – think about how your current job responsibilities differ from when you first began.

## Top 20 resume pet peeves

Resume Doctor.com conducted a survey of 2,500 recruiters across the U.S. and Canada and compiled this list of Top 20 Resume “Pet Peeves.” Make sure you avoid these mistakes!

1. Spelling errors, typos and poor grammar
2. Too duty oriented – reads like a job description and fails to explain what the candidate’s accomplishments were and how they did so
3. Missing or inaccurate dates
4. Missing or inaccurate contact information and unprofessional e-mail addresses
5. Poor formatting – boxes, templates, tables, use of header and footers, etc.
6. Functional resumes as opposed to chronological resumes
7. Long resumes – over two pages
8. Long, dense paragraphs – no bullet points
9. Unqualified candidates – candidates who apply to positions for which they are not qualified
10. Personal information not relevant to the job
11. Missing employer information and/or not telling in which industry or product line the candidate worked
12. Lying or misleading information, especially in terms of education, dates and inflated job titles
13. Objectives or meaningless introductions
14. Poor font choice or style
15. Resumes sent in .pdf, .zip files, faxed, web page resumes, mailed resumes – anything not sent as a MS Word attachment
16. Pictures, graphics or URL links that no recruiter will call up
17. Lack of easy-to-follow summary
18. Resumes written in first or third person
19. Gaps in employment
20. Burying important information in the resume

## References

- Do not include references or quotes others have shared in reference to your performance in the body of your resume. Reference requests are made when there is actual hiring interest and not before. As mentioned previously, a line stating, “References are available upon request” on your resume is not necessary
- Be sure to ask the individuals if they would be willing to be a reference for you prior to mentioning their names to prospective employers. Be sure they will give you solid professional references
- Prepare a list of three references to provide at the interview. The list should include name, title, employer, address, and business and home phones. If the individual has moved to a different company and it is not clear where you worked together, indicate the name of the company where you worked with the individual and the nature of your relationship. See the sample reference sheet on the next page for an example of how to format your references
- When identifying references, consider selecting individuals who are familiar with your work in a variety of capacities, such as an ex-supervisor who thought highly of your work, a higher-level manager who knows your work and potentially a peer or a colleague who has worked closely with you

- When it becomes clear that a potential employer will be conducting a reference check, consider reaching out to your references to provide details about the job the employer is considering you for. Be sure to let your references know what skills the employer is looking for and examples they might provide to demonstrate how you meet those qualifications

## Sample reference sheet

### References for

#### **Jane Doe**

555 Jane Avenue  
Doe, CA, 91234  
(555) 555-5555  
jane@janedoe.com

#### **Bob Smith**

Vice President of Human Resources  
(former HR Director at Thompson & Co.)  
XYZ, Inc.  
1234 Company Way  
Sacramento, CA 95862  
(555) 555-1234  
bsmith@abc.com

#### **Tom Thompson**

President  
Thompson & Co.  
555 Thompson Way  
San Francisco, CA 94111  
(555) 321-7654  
tomt@123.com

#### **Robin Bird**

Membership Manager  
Alumni Association  
5432 College Way  
College Town, CA 94321  
(555) 987-6543  
Bird.rob@xyz.com

## Salary history

How do you respond to a job posting that prompts you to “send resume with salary history?”

Hiring managers and recruiters often sort through hundreds or thousands of resumes to find suitable applicants, and they use a salary history as a way to find a candidate who fits the position’s pay range. Companies want to interview applicants they know they can afford. Some employers requesting a salary history will immediately discard applications that omit this information.

If you decide it is in your best interest to present a salary history, use the opportunity to market yourself. Include information about your key accomplishments, allowing hiring managers to see the real value you offer.

There are also potential drawbacks to providing your salary history:

- If you are willing to take a salary cut, revealing an earnings history that is higher than the range for the opening may price you out of the running.
- If you were underpaid in previous positions, stating your history may lead a prospective employer to think you are an inexpensive resource and potentially cause them to shave thousands of dollars off your salary offer.
- A lower salary level may also give the impression that your work experience is not strong enough.
- You may be concerned about disclosing your income history to a complete stranger.

Even if an ad requests a salary history, many employers will still consider qualified candidates who omit this information. You can bypass the salary history request by mentioning in your cover letter that you would be pleased to discuss salary information once a mutual interest has been established.

## Creating a salary history

The easiest way to create a salary history is to use your electronic resume document or file. Follow these steps:

1. Open your resume file in your word processing program and save it as a new document (e.g., Name\_salaryhistory.doc).
2. Leave in the heading that contains your name and contact information so the salary history layout matches your resume layout.
3. Title your page “Confidential Salary History.”
4. Remove all sections of your resume except your work history – leave in employer names, dates and job titles.
5. Add two new lines with your beginning and ending (or current) compensation, including bonuses, stock options, tips and benefits.

## Sample salary history

### **Jane Doe**

555 Jane Avenue  
Doe, CA 91234  
+1 555 555 5555  
jane@janedoe.com

## Confidential salary history

### **XYZ, Inc. – Sacramento, CA**

**Assistant Controller**, 5/99 to present

- Beginning compensation: \$51,000 annually plus commission
- Current compensation: \$62,000 annually plus commission

### **Thompson & Co. – San Francisco, CA**

**Senior Financial Analyst**, 12/97 to 5/99

- Beginning compensation: \$42,500 annually
- Ending compensation: \$49,500 annually

### **ABC Co., Inc. – Oakland, CA**

**Financial Analyst**, 7/93 to 12/97

- Beginning compensation: \$32,000 annually
- Ending compensation: \$40,000 annually

**Deloitte – San Francisco, CA**  
**Staff Auditor, 5/92 to 7/93**

- Compensation: \$28,000 annually

# Job search correspondence

Written correspondence is a vital part of the job search process. A letter is an opportunity to showcase your written communication skills and can help differentiate you from the rest of the candidate pool.

During a comprehensive job search, you may need to create several types of letters. The three more common types of correspondence include:

- Cover Letters
- Networking Letters
- Thank You Letters

The time you spend writing letters is not wasted – it can actually pay off with big benefits in the long run by helping to get you noticed. A well crafted letter can play a key role during the job search process.

- Demonstrates that you are professional and courteous
- Elevates you above candidates that have not taken the time to correspond in writing
- Provides an opportunity to highlight your strengths and information you may have forgotten to share during an interview
- Allows you to personally connect with the reader
- Serves as a reminder of your continued interest in the opportunity

## Cover letters

Marketing yourself is a critical piece of the job search process. As such, you should view your cover letter as a critical piece of your marketing strategy. While your resume reflects what you have done in the past, your cover letter is an opportunity to explain what you want in your next opportunity and what you can do for a prospective employer. Ultimately, the goal of sending your cover letter and resume is to get an appointment for an interview.

- Using the same cover letter for each application is not as effective as customizing your letter. Email has made it easy for candidates to fire off hundreds of resumes in a day. Your cover letter and resume may be stacked up against more competition than ever before. Customizing your cover letter can set you apart from other applicants

## Composing a cover letter

Composing a great cover letter involves three key steps.

## Research before you write

The more you know about the employer's needs, the more compelling your letter will be, so be sure to do your research before you write your cover letter. Review company websites, brochures, sales flyers and promotional material to learn about its mission, performance, goals and culture. Newspaper archives, libraries and career center resources are also good research resources.

It may also be helpful to speak with current employees to get their perspective, so use your network to find contacts. Deloitte LLP AlumNet website can help you expand your network at your target organization by helping you identify former Deloitte employees currently working there.

Resources for company-specific information include:

- Hoover's, Inc. Online
- EDGAR® Online
- Dun & Bradstreet
- Securities & Exchange Commission

You may also wish to refer to the Using the Internet section of this guidebook for more information on company and industry research. The Deloitte LLP AlumNet website also has tools to assist you with the research process under the heading "Career Research."

## Determine your unique selling points

Take time to perform an inventory of your talents, skills and achievements. You will use this information in writing the body of the cover letter.

- How will you help achieve organizational goals?
- What sets you apart from the other candidates?
- How are you the best match for the position?
- What are your top five selling points?

## Construct your letter

Job seekers often spend numerous hours developing their resumes and then treat their cover letters as an afterthought. This can be a critical mistake, as the cover letter can help your resume get noticed. Follow this outline for creating a professional cover letter.

### Heading

- Select a standard business letter format
- Letter design (font, paper, etc.) should match your resume

### Salutation

- Address your letter to the hiring manager. If the posting doesn't list a name, do some research to identify a contact person. However, do respect ads that state "no phone calls please"
- Keep the salutation professional by using the contact person's last name, not their first name (e.g., "Dear Mrs. Johnson", not "Dear Mary")
- If you do not have the hiring manager's name, use "Dear Hiring Manager" or "Dear Selection Committee" instead of "Dear Sir/Madam" or "To Whom It May Concern"

## Opening paragraph

- Clearly state the name of the position for which you are applying
- Include the referral source (e.g., recommendation from current employee, Internet job posting, newspaper ad, etc.)
- Provide a synopsis of why you are a top candidate for the position

## Body – The pitch

- Outline the top reasons you are worthy of an interview
- Focus on how you can meet the prospective employer’s needs – relate how your top five selling factors align to the requirements of the position
- Minimize your use of the word “I” to avoid the perception of being self-centered
- Support your listed achievements with specific examples of your past successes
- Keep your letter positive and upbeat

## Closing

- State that you will follow-up soon to confirm your resume was received and discuss the potential for setting up a meeting
- End with a professional close such as “Sincerely,” “Regards,” or “Respectfully Yours”

## Special circumstances

### Salary requirements

Often when candidates are asked to include salary requirements when submitting their resume and cover letter, they find themselves in a “no-win” situation. Stating a number that is too high, may cause the employer to automatically screen you out. Stating a number that is too low, could position you for pay you less than what the position is worth.

So what is the best way to respond? Give the prospective employer a reasonable salary range. You can state something like, “My salary requirements are in the mid \$40,000 – \$50,000 range, based on the job responsibilities and the total compensation package.” See the Offers and Negotiations section for information on determining your salary range.

Including your salary requirements can actually work to your advantage. The cover letter gives you the chance to emphasize you are worth the money. Let your reader know that your range is negotiable. Your chances of being considered will increase if the employer knows you are flexible and willing to negotiate.

### Confidentiality issues

If you need complete confidentiality, this may be noted on the cover letter. On the line above the salutation, type in caps and underline ‘PERSONAL AND CONFIDENTIAL.’ At the end of your letter, you can type a brief explanation and request that your application be kept in confidence.



## Top 10 list for cover letter etiquette

To make the best impression when composing a cover letter, be sure to follow these ten rules:

1. Always send a cover letter! It is proper business etiquette to accompany a resume with a cover letter and it gives you the opportunity to sell yourself for the position
2. Use a strong opening. For example: “Your need for a top-performing account representative is an excellent match to my seven year history as a #1 ranked, multimillion dollar producer”
3. Keep your letter professional, but friendly. The cover letter gives you a chance to reveal your personality and show you are a good fit for the position. You want the reader to like you
4. Be concise and respectful of the reader’s time. Keep your letter to three to four paragraphs. Get to the point as expeditiously as possible and break any paragraph of seven lines or longer into short, easily readable ones
5. Use your letter to tell a brief story. Do not restate your resume, instead tell the reader about your “Toughest Challenge” or “Most Innovative Solution”
6. Let your cover letter stand out by using some creativity. You could incorporate excerpts of performance reviews to highlight your record of success or you could create two columns in your letter to demonstrate exactly how you meet the employer’s requirements:

Your ad specifies...	and I deliver.....
Five years experience in accounting	Seven years of top rated performance as an auditor with a Big 4 firm

7. Customize. If you are using one letter to apply to a number of similar positions, remember to customize it each time. Remember to update the company, job title and hiring manager information, so your letter is addressed to the right person!
8. Be polite. Thank the reader for his/her time and consideration.
9. Thoroughly proofread your letter before sending – cover letters should be completely free of errors. Also, make absolutely sure you have the correct spelling of the hiring manager’s name.
10. Sign the letter. It is proper business etiquette and shows attention to detail to sign your letter.

## Cold cover letters

A cold cover letter is an uninvited inquiry to an employer, recruiter or other hiring manager regarding possible job opportunities. The potential advantages of a cold cover letter include creating a job that did not previously exist, gaining early consideration for a position that has not yet been advertised and expanding your network of contacts. By sending a letter to an employer who is not looking for candidates, your resume will not be buried in a pile of hundreds of others.

When writing a cold cover letter:

- Know yourself: What do you offer? Why should the company take an interest in you? What skills, abilities and credentials do you have that would be desirable to the organization?
- Research the employer: Find out as much as you can about the target company so you can write knowledgeably about how you could benefit the organization
- Address your letter to a particular person: This is crucial since you are writing an unsolicited letter. Do some research so you can get your resume in the hands of the manager most likely to be interested in hiring you
- Open your letter with a value proposition (e.g., “Your company goals are \_\_\_\_\_ and I am an experienced \_\_\_\_\_ that can help you achieve those goals”) or a news angle (e.g., “After reading about your company’s growth plans for the \_\_\_\_\_ division in this week’s Anytown Business Journal, I am excited to join your team as a \_\_\_\_\_.”)
- Summarize the key strengths you bring to the table: Include a bulleted list of achievements and qualifications that would benefit the company

## Networking letters

A networking letter reaches out to friends and professional contacts to ask for career advice, referrals and introductions. Your job search will be more effective if you connect with and expand your network of contacts, rather than just respond to job postings.

The focus is not to ask your contacts for a job, but to request their assistance in your job search by connecting you with new people and opportunities. Through networking, you may also be able to uncover hidden job opportunities. See the Networking section for tips on how to develop a network.

When writing a networking letter, be mindful of the following:

- Be friendly – the tone of the letter should be casual but professional.
- Have a message – provide a brief summary of your key strengths and include examples of how you benefited your previous employers.
- Respect the reader's time – be concise.
- Ask for leads and information – do not be afraid to ask for advice.

A good networking letter should follow the same format as a cover letter:

- Heading
- Salutation
- Opening paragraph
- Body – The pitch
- Closing

Keep in mind that the most effective networks exist beyond a job search. Once you have found a job, keep in touch with the network of contacts that helped you during your search. Continue to network after your job search and if someone has helped you, express your thanks and return the favor if possible.

## Thank you letters

Writing thank you letters is not just a formality. Thank you letters are marketing tools that can have significant value in solidifying your candidacy and positioning you above the competition. Although much of what you include in your thank you letter may have already been communicated during your interview, there is nothing more effective than the written word to imprint those thoughts in your interviewer's mind.

### Purpose of thank you letters

- **Overcome Objections.** If there were specific objections raised regarding your candidacy during the interview, use your thank you letter to respond to and overcome those concerns. Demonstrate that the concerns are not an obstacle but an opportunity and you are prepared to meet the challenge
- **Reiterate Your Expertise.** If an interviewer communicated specific needs, issues or challenges, use your thank you letter to demonstrate how you can meet those needs
- **Highlight Your Core Professional Competencies and Successes.** If the interviewer revealed the qualifications of their ideal candidate, use your thank you letter to outline how you meet or exceed each qualification

### What to say in your thank you letter

Your exceptional cover letter and resume landed you an interview. Now it is time to thank everyone you spoke to that day. What do you say in your thank you letter? Here are some thoughts:

- Thank the person for the opportunity to interview with the company and for spending time with you.

- Personalize the letter by recapping some of your conversation. This is particularly effective to demonstrate you were listening to the interviewer and understand what they are looking for in a candidate.
- Clarify and/or follow-up on any outstanding items or pending questions from the interview.
- Most importantly, market yourself one more time. Use the last paragraph as the chance to state, “The position is a good fit for me because I have experience in \_\_\_\_\_”

## Thank you letter etiquette

To make a good impression when writing a thank you letter, follow these guidelines:

- Send a thank you letter to each person with whom you interviewed
- If you are interviewed a second or third time with the same company, send a thank you after each interview
- Keep your letter professional in tone and style
- A typewritten thank you letter is standard. It will demonstrate your professionalism and prove you know how to write and format a letter. However, you should keep in mind the type of company with which you interviewed and use your judgment to determine the right medium for your thank you letter (for example, e-mailing a thank you letter to a technology company is appropriate; using regular mail might suggest you are not up-to-date with technology)
  - If you have always corresponded with the prospective employer via e-mail for setting up the interview and answering questions, then it is acceptable send an e-mail thank you
  - If the prospective employer you interviewed with is more formal and traditional, use regular mail to send your thank you letter
- If sending your thank you via e-mail, avoid shorthand, acronyms icons and symbols like happy faces
- Handwritten notes are appropriate if you would like to extend your thanks to those in the office who provided assistance in some way (e.g., administrative assistant who showed you around the office)
- Proofread your thank you letter meticulously. Spelling and grammar should be perfect – just one typographical error can be detrimental. Keep in mind that your computer’s spell check function often will not catch word substitution errors (e.g., manger for manager), since the problem is one of incorrect word choice rather than misspelling
- Send the letter **promptly** – Thank you letters should be forwarded to the interviewer(s) as soon as possible after you interview, but no more than five days later

Keep in mind that you already have the company’s interest and use your thank you letter as a tool to communicate valuable information. The entire job search process is marketing your product – YOU.

# Networking

## What is networking?

According to the dictionary, networking is “To make contact with others for the purpose of obtaining information and assistance related to one’s career goals.” Simply put, networking is talking to people – something we do every day. But with networking, it helps to have an agenda in mind, so you can maximize your conversational efforts and walk away with information you did not have before.

## Why should you network?

- Networking allows you to obtain and share information
- Networking increases your visibility on the marketplace
- Networking assists with additional developing contacts, leading to potential opportunities
- Networking helps you practice communicating and selling yourself, which are skills everyone should continue to improve upon

Do not mistake “finding a job” with networking – instead, consider it a research tool. Using this tool will increase your awareness of the market as well as increase the market’s awareness of you. Networking is probably the most effective method for finding the right job opportunity.

## Steps to creating your network

1. Create a contact list of people you know; Use the “3 minutes – 30 colleagues” worksheet in Appendix G
  - Your list might include current and former co-workers/supervisors, clients, vendors, friends, family, members of professional associations, religious organizations and/or community groups to which you belong, people in the information business (resource centers and libraries), and community service agencies
  - Expand your network by using a virtual networking web site, such as LinkedIn.com or Spoke.com. Utilize these tools to locate and reconnect with individuals from your past and identify new connections. Many people from Deloitte, current and alums, participate in these types of networks
2. Take your contact list and detail how you know each individual, where they work, and how to contact them
3. Prepare a 30-second elevator pitch that succinctly states:
  - Who you are
  - Your reason for exploring other opportunities
  - A summary of your experience starting with the most recent
  - The types of opportunities and organizations you are targeting
  - Why you have reached out to the individual with whom you are speaking
4. Research
  - Be able to define and articulate what kind of opportunities and organizations you are targeting, and conduct research on these companies. Be prepared to share your knowledge
  - Preparation prior to reaching out to your network is crucial
5. Reach out to those on your contact list for advice and/or informational interviews

- See sections below about how to reach out to a contact and the purpose of informational interviews
6. Establish protocol for follow up
    - Offer to follow up with your contact and ask how long they will need to reach out to their network. Gives you control over the follow-up piece of the process
  7. Track Results
    - Develop a system that will help you track your networking activities; who you have spoken with, when to follow up, and the deliverables they have promised
    - This tracking tool could be Outlook, a paper-based system or whatever tool is most comfortable for you
  8. Reciprocate, if possible
    - Try not to always be on the receiving end. Try to give as much as you are getting – maybe not now, but in the future
      - Send an article about their company, industry, client, or even a competitor providing them with some competitive intelligence
      - Offer to do some research, regarding a topic that is of interest to them
      - If an opening is not fit for you, refer another candidate/friend who you would endorse
  9. Thank your contacts
    - Make sure you let the people in your network know how much you appreciate their help

## Informational interviews

What is an informational interview? It is a way to gather information about a company, industry, or job function through the firsthand experiences and impressions of someone who is close to that occupation or organization. Informational interviews are an important piece of your overall job search action plan and can help you validate whether your target job(s), industry or company will be a good fit for you.

While you should never ask for a job during an informational interview, these types of conversations can uncover hidden job opportunities or help you expand your network and cultivate relationships in organizations that may lead to a job sometime in the future. Informational interviews are also a great way to practice real life interviewing skills in a less stressful setting, since you are in control of the conversation.

## Preparing for an informational interview

Before requesting an informational interview, you should spend some time reflecting on your core skills, interests and values. This will help you prepare a line of questioning that will address the issues most important to you. For more information on self-assessment, please refer to the Self-Assessment and Reflection section of Creating a Job Search Action Plan.

While it is important to be prepared with a list of questions before you arrive at the interview, you should focus first on building rapport with the individual with whom you are speaking. Even if you hope to come away from the conversation with a specific piece of information or lead, you should focus on the person first. The best informational interviewers are active listeners who hear not just the words being said but also the feelings and attitudes behind the words. It requires that you really listen, not prepare for what you are going to say next, and that you ask follow-up questions to understand what the other person is really saying. There will come a time in the conversation for you to introduce your own skills and experience, but first you want this person to believe that you contacted them to learn about them and their role.

## Questions to ask during an informational interview

So what kinds of questions should you ask? Try to structure your interview around open-ended questions, which cannot be answered with a single word (e.g., “yes,” “no,” or “seven”). This type of questioning requires thought and engages the answerer’s mind. When questions focus on the other person’s experience, interests or expertise, both of you will be more comfortable during the conversation, and the other person will often open up to you about what and whom they know (your objective for networking). After all, who doesn’t enjoy talking about themselves?

Some questions you might ask the individual that you interview include:

- Tell me about your role.
- What does a typical day look like for you? Typical week?
- How has your educational background (degrees, training, certifications) prepared you for this job?
- What types of courses would you recommend to someone who is entering into the profession?
- What types of experience are necessary for the job?
- How does one obtain the necessary work experience?
- Are there opportunities for advancement? What are they?
- What characteristics should an individual who is interested in this line of work possess?
- What kinds of challenges do you see in your role or organization?
- What are the salary ranges?
- Does the company offer training?
- What are the demands and/or frustrations of the job?
- Who do you report to?
- What are the prospects for advancement?
- What is the typical career path?
- What kind of continuing education might be necessary for success in your role?
- What associations or organizations do you recommend joining for someone in your field or role?
- Is there work-life balance?
- Are you expected to have “extracurricular” activity, such as community involvement?
- What is your opinion of X market/industry?
- Who do you think are the major players in your market/industry?
- How have you built your network in this industry?
- How did you come to find your current position?
- Where would you recommend I focus my job search efforts (specific web sites, associations, recruiters, etc.)
- Is there anyone else I can talk to who has a similar title at another company?
- Is there anyone else with whom you would recommend I speak?
- What kind of opportunities do you see being a fit for my background?

When you are able to introduce yourself into the conversation, try to keep it short and to the point. Your 30-second elevator pitch can be a great way to help leave the individual with a clear understanding of your skills and experience and the kinds of opportunities in which you are interested. You should be prepared to give the person you interview your resume, and possibly a memo or letter, defining your key selling points; however, you should not provide these materials unless asked.

While most job seekers hope they will strike gold with an informational interview, it is important to remember that not all conversations will end with a job opportunity. You are building your network and every conversation will bring you that much closer to your next opportunity. If the person you interview refers you to others in his or her network, you should treat these contacts with respect – follow-up with them and thank the person who referred you after you speak with their contact. Every contact is an opportunity to sell yourself and distribute your marketing message.

## Four guiding principles for networking

In order to maximize networking as a tool, remember these four principles:

- **Ask for advice or direction, not for help.** While few people will go out of their way to help a complete stranger, most people are happy to offer their opinion. Own the work of your job search, but leverage your network for their expertise and experience.
- **Don't ask for a job.** Learn as much as you can about your target job, industry and organization and leverage this information as you uncover and pursue opportunities.
- **Be courteous of your network's time.** Get the information and get out. Do not make unnecessary repeated calls to check in. Only make contact for a genuine purpose.
- **Don't play games within the network.** Make solid decisions quickly and then move on. Your network will not find a job for you – that is your job. Your network provides an avenue to uncover opportunities that you can pursue.

# Search firms

The probability of attaining a new position via a search firm depends on several factors including the marketability of your skill set, the reputation of the search firm, and the state of the economy. In a “candidates’ market” or a booming economy, companies are competing to find candidates and will most likely utilize multiple search firms. In a down economy, however, many corporations will bypass the use of search firms and solicit resumes or post positions on their own, in order to save money on search fees.

That being said, some companies will always choose to use search firms, regardless of the economy. This could be due to limited resources to cull through resumes and coordinate interviews or presence in an industry that is less impacted by the state of the economy. For executive level positions or highly specialized fields, most corporations have no choice but to use a nationally recognized search firm in order to find top candidates and to be able to draw from a national pool of people. While they should not be relied upon to the exclusion of other methods, search firms can play an important part in a balanced search strategy.

Search firms can also be a great source of information regarding how best to market yourself, appropriate salary ranges for your background and target companies, and feedback on your resume. Be aware that some search firms may not be as strong at providing career related advice, as they prefer you take one of their positions than see you go elsewhere. Remember that ultimately, the search firm is working for their client and not for you, the candidate. However, reputable firms will express and exhibit a true interest in the needs and desires of the candidate as well.

## Types of search firms

- **Retained:** These firms are retained by a company and receive payment regardless of the outcome – even if the client changes their mind and fills the job internally or decides not to fill the position. Retained firms typically work on higher-level positions, have a minimum salary requirement (usually \$100k or more) and receive higher fees. Many times, retained firms specialize in a particular industry and are very selective about their candidates. In general, they prefer to find candidates on their own through research and networking, but will sometimes work with individuals who contact them as well. The goal of the retained firm is to find the best candidate in the most efficient manner
- **Contingency:** These firms or agencies receive payment only when they deliver a candidate who is hired and who stays in that position for a predetermined amount of time (typically, 30 to 90 days). They typically work on positions with salaries less than \$100K; however, they can handle higher level positions as well. Their objective is to identify as many candidates as possible with the hope that one gets the job
- **Retingency:** This is a fairly new concept. The retingency engagement is similar in structure to a traditional contingency search; however, there is an initial retainer (typically no more than 25% of the total fee) that is intended to ensure that both sides have a commitment to the process. A retingency approach is designed to adopt the best aspects of the retained search without the large upfront cash investment

## Identifying a search firm

The most ideal way to identify a search firm is by referral – reach out to your personal and professional network to identify reputable recruiters. Because firm reputations and quality of service can vary greatly, having a recommendation can be extremely helpful. Being referred by a former client may also make the recruiter more comfortable working with you.



If you are unable to identify a recruiter through a referral, consider searching for a suitable search firm online. Another option is the National Directory of Executive Recruiters by Kennedy Publications. This hard-copy book is a fairly comprehensive listing of all national firms and they can be sorted by industry, geography, name, etc. The book is printed and is available at most public libraries.

## **Interviewing search firms**

Treat your initial meeting with a search firm like any other interview. In this meeting, their goal is to evaluate you on your appearance, interview skills, communication skills and other personal traits and characteristics important to their clients. The firm wants to determine if you will make a good impression on their client – their reputation is based on the quality of the candidates they present. It is very uncommon for a search firm to present you to a client prior to meeting you in person.

## **Questions to ask when you are first speaking with a search firm**

- Is this a retained, contingency or retengency search firm?
- What industry or career field do you specialize in? How many years of experience in that area?
- Would you mind sharing with me the names of the firms with whom you do the most business?
- How many open positions are you currently handling? How many is your firm (or a particular division of the firm) handling right now?
- What types of positions have you recently filled?
- How many candidates are you currently working with?
- Will you contact me prior to sending my resume on to a potential employer?
- Will you contact my references at the front end of the process or regarding only the opportunities for which I might be a fit? Will you be asking them to provide you the names of other candidates as well?

## **Developing relationships with search firms**

In addition to writing an excellent resume and cover letter, you need to work hard to make personal contact with search firms. Even the few who diligently read the resumes and cover letters they receive will quickly lose you among the stack of papers on their desk or e-mails in their in-box. A good 15-minute conversation with a search firm can distinguish you from the pack and help you stand out. On-going communication is key to building a relationship with the recruiter and helping to ensure that you will come to mind when an appropriate position comes along.

## **30-second elevator pitch**

When you get on the phone with a search firm, do not be offended if it turns out that they have not read the material you sent them. You should be well prepared and practiced at verbally delivering a description of your background, interests and capabilities in five minutes or less. Do not forget that the impression you make on them helps them determine if they would be comfortable putting you in front of one of their clients — be professional and prepared for these discussions.

## **Call search firms back**

Start returning calls from search firms even if you are not interested in the position. When looking for a new opportunity, it is important to explore all options. Take the time to hear about the opportunities they have and if they are not a fit now, there may be an applicable opportunity in the future. Search firms can also be a great source of general information, so this could be a way to get their ideas on appropriate compensation ranges for your level, etc.

## Questions to ask when a search firm first presents an opportunity to you

- Does the opportunity match the requirements outlined in your “Creating the Filter” exercise? (Keep in mind that contingency search firms may sometimes try to persuade you into applying for positions that do not fit your criteria, e.g., you are no longer interested in Big 4 Audit, but they want you to interview for an audit position with PWC. They are looking for an easy fit and may not always consider your needs ahead of their own)
- What is the target compensation for the position?
- In what timeframe is the employer looking to make a decision?
- How far along in the interviewing process are they? (This can be important because there could be other candidates so far ahead of you in the process that you do not really have a fair chance to complete the process – many companies do not interview all the candidates and entering the process at the end of the process usually indicates a search firm’s long shot submissions)

## Things to consider

As with any business, you will find that there are reputable search firms and those that may not have your best interest in mind. Additionally, you want to make the best impression possible when speaking with a recruiter.

When working with search firms, consider the following:

- It is important to partner with only those recruiters that you feel are experienced in your field, understand your career objectives and will represent you professionally in the marketplace
- Don’t feel like you need to maintain a relationship with every recruiter that contacts you – this can be a significant drain on your time. An effective job search strategy will incorporate the use of 2-3 highly effective recruiters that are ideally covering different aspects of your search. For example, you may have recruiters focusing on different locations or industries
- The volume of resumes that search firms receive is huge — it is always best to follow up or lead with a personal phone call
- Be honest with your recruiter. Make sure you are very clear in explaining the type of position you are looking for. This will help to prevent misunderstandings that could arise between you and the search professional as to the kinds of positions they present to you vs. the kinds of positions you are targeting
- It is OK to be candid about your compensation requirements — the recruiter wants to help you get the highest salary possible because they are typically paid a commission based on your compensation. Ask them for feedback on a salary range that would be appropriate for your skill set and the kind of positions you are targeting
- If you come across to the search firm as indecisive about the kinds of positions you are targeting, they may not be as comfortable presenting you to clients. Narrow your targeted positions and present them clearly and confidently
- Remain professional throughout your dealings with your search professional. If you are frustrated with some of the clients they have presented you to or that you have interviewed with, be sure to temper your feedback — remember, they are evaluating your professionalism and determining if they are comfortable presenting you to clients
- Make sure that they will contact you prior to sending your resume to a company. This is important because you do not want a company to receive your resume from multiple search firms (assuming you are working with other contingency firms) or from multiple sources (e.g., a friend or a relative who works at that firm). This can cause you to be “disqualified” from the interview process, as the company may not want to deal with a legal fight between presenting entities. It can also alienate you from the search firms involved
- If a search firm contacts you directly, they may have seen your resume on the internet or received your name from a contact of yours. Be sure to clarify how they got your name. Keep in mind that based on your skill set, they may try to present you to a company who has not hired them, hoping that they may be able to get business this way. Many companies are not open to unsolicited resumes and these search firms may not be very useful to you. In cases like this, it would be better to apply to the company directly than to hope that the company will accept your resume from an unsolicited search firm
- In order to stay informed and to remain in the mind of your search professional, establish a protocol for future contact

- In registering with a search firm you may be asked to complete an application, so be prepared with your basic information, including companies worked for, titles, dates, supervisors, references and salary history
- In preparation for an interview that your search professional sets up for you, your search contact can typically provide a wealth of information about the company and sometimes even the hiring manager. He/she may be able to give you first hand information about the corporate culture, the position, and the people that you may not be able to uncover on your own
- After the interview, the recruiter will give you honest, straightforward feedback from their client. Take advantage of this opportunity to get some constructive feedback. What did you do well and what could you improve upon? Be sure to consider the feedback as you prepare for future interviews
- Never pay a search firm a fee for working with you. In very rare instances of extremely high-level candidates, it may be appropriate to hire a marketing firm to present you. In virtually all other cases, the firms who are hiring should pay any fees
- Utilizing search firms should be only one piece of your overall job search strategy — be sure to continue with a multifaceted approach to your search. Only dedicate the percentage of time to search firms that is proportional to the chance of success in using them (approximately 7-15% depending on the job market). Networking is still the number one way that individuals get a new position
- If at any point during the process you feel uncomfortable, angry, disenchanted or just have a gut feeling that something is not right, do not work with that firm anymore. Thank them for their time, but let them know that you would not like to be a candidate any longer. There are plenty of recruiters who will treat you with respect

# Using the internet

The Internet can play a significant role in your job search. While online job postings tend to get the most attention from job seekers, there are many resources available on the web to help you with your search. This section highlights the ways in which the Internet can be a powerful tool in your overall job search strategy.

## Online job boards – An obvious first step

There are numerous sites where individuals may search open positions and post their resumes for employers and recruiters to view. Most sites offer job postings which are free to job seekers. Many of these sites also offer additional resources including company and industry research. Another resource offered on many job boards is a personal “Job search agent.” Job search agents continually look for jobs based upon specified criteria, and notify the candidate by email when matching jobs are found. After entering job search criteria in the job search agent, job seekers will begin to receive emails from these sites containing jobs, which match the criteria entered. Most sites let job seekers decide how often they wish to receive notification of matching jobs. Typical options are daily, or every 3-7, 14 or 30 days. Most sites allow you to set up more than one agent for multiple positions. Taking five minutes to set up a job search agent can ensure a regular flow of potential opportunities, and free you up for more important activities such as networking.

While searching for jobs is usually free, posting your resume can be free or fee based. The fee-based sites are not always the best, so focus on the free ones first – particularly if you are uncertain as to whether organizations in your target industry utilize online resume sites. Online job boards fall into three main categories: general job boards, niche job boards, and meta-search tools.

## General job boards

General job boards such as Monster.com, CareerBuilder.com and HotJobs.com, are extremely popular with both job seekers and employers. General job boards literally list thousands of open positions across all locations, industries and career specializations. These sites also allow job seekers to post one or several versions of their resume. While searching for positions on general job boards can be effective, keep in mind that there is typically a high-volume of applicants for each position. It is not at all uncommon to submit your resume for a position and never hear back. A better strategy might be to search for positions on the job boards, but instead of applying online, attempt to “break in” to the company through an individual in your network. Having your resume submitted directly to HR by someone that currently works for the company (and will receive a referral bonus) or is connected to someone that does, is typically more effective than applying to a general mailbox online.

## Niche job boards

Niche job boards are similar to general job boards in that they typically list open positions and allow you to post your resume. However, instead of focusing on all locations, industries and career specializations, niche job boards focus on one specific segment. For example, there are niche job boards that focus on areas such as: specific cities, career fields such as accounting, certain technologies such as Oracle®, different ethnicities, etc. There are also niche job boards that cater to individuals either coming from or looking to get into the “Big 4” – for example, Big4.com. There are also niche sites that focus specifically on executives earning \$100K+ such as theladders.com and sixfigurejobs.com. The advantages of the niche sites are that the types of positions listed are

more targeted and that there may be fewer applicants for each position. However, the niche sites may not list all of the positions in your area of interest, so it is always best to balance your use of niche sites with at least one general job board.

## Meta-search tools

The third type of online job board is a meta-search tool. Meta-search tools search and pull positions from a variety of locations on the Internet and combine them on one comprehensive site. For example, a meta-search tool such as Indeed.com, FlipDog.com or TopUSAJobs.com will pull positions from general job boards, niche boards and company's career pages and place those jobs all in one place. While meta-search tools can save a lot of time, you also need to be aware that technology is not perfect – some crucial jobs/sites can be missed. It is always best to search a couple of sites to make sure you have adequate coverage.

## Recommendations for searching job boards

Strategically using job boards can be a very effective part of your overall job search strategy. When using job boards, keep the following recommendations in mind:

- **Set aside “limited” time** – Many job seekers feel that they could literally spend all day, every day searching dozens of job boards for positions. However, keep in mind that your time is limited – you need to balance the time you are spending on the Internet with time focused on other channels such as networking, working with search firms, etc. Work to determine what amount of time each week is reasonable to spend searching job boards.
- **Be selective** – there are literally thousands of jobs posted online everyday. The trick to efficiently managing your time is to be selective in determining the job boards you search on. At the beginning of your job search, experiment by searching on multiple sites. However, once you have found a few key sites that have returned good results, focus your efforts there.
- **Narrow your search strings** – using extremely broad search strings on job boards will likely return hundreds of positions to sort through. You can safely narrow your search by using Boolean search strings, searching job titles only, the use of quotation marks and asterisks, etc. For a tutorial on Boolean Searching you may also refer to: <http://library.nyu.edu:8000/research/tutorials/boolean/boolean.html#>
- **Keep track** – Because you will likely be posting your resume on multiple sites and responding to several job postings, it is extremely important to keep track of this information. Keep a detailed list (including dates) of which sites you have posted on, as well as the positions you have applied to. If you have multiple resumes, it is important to track which version of your resume was posted or sent to employers. Many job seekers actually print off a copy of the position that they applied to – when an employer contacts you, you can easily refer to the position they are calling about as well as the requirements for that position.

## Posting your resume online

Many job seekers have successfully found employment by posting their resume online. Take time to determine which sites would be most effective for you. Keep in mind that your resume becomes public the moment it is posted. If you are conducting a confidential job search it is recommended that you remove identifying information, such as your name and instead include your e-mail address only. Be sure to avoid using an e-mail address that may appear unprofessional for example: [ilovedogs@yahoo.com](mailto:ilovedogs@yahoo.com) or [babydoll5@gmail.com](mailto:babydoll5@gmail.com). Also be aware that the information that you are posting needs to be accurate – many employers will eventually compare your background investigation results to the resume you originally posted online. Finally, understand that many of the individuals contacting you in response to your online resume may be search firm recruiters. If that is the case, please refer to the Search Firm section of the Guidebook for tips on working with recruiters.

## Resume style and file format

Before posting your resume, finalize your resume style and file format. Most online posting tools prefer resume data to appear in chronological order, so if you currently use a functional resume you may need to convert it to

chronological style. The file format you use for your resume will depend how the resume is used once you upload it online. Generally speaking, online posting mechanisms do not deal well with fancy formatting and symbols, so it is best to keep things simple.

When recruiters and hiring managers search a database for resumes, they often perform a search using keywords to find candidates with appropriate skills and experience. Many job seekers create a box on their Internet resume where they list words that are particularly relevant to their experience. For example, if you are submitting your resume for a consulting position requiring Oracle implementation experience, you might create a key word box including the words, “consulting,” “Oracle,” and “implementation.” This method creates a better chance of your resume being picked up by the searcher. Typically, this box would be removed when sending your resume directly to an employer and in the hard-copy version.

## Posting personal information

Caution! It is important to do your research before posting your resume on a job site. Read the site’s Privacy Policy. Some sites promise they will not sell your personal information, while others will reserve the right to sell your personal information to others. To safeguard your privacy and identity, remove all personal information from your resume such as your phone number and address. A current email address is enough contact information for a potential employer to contact you. If you are worried about spam, you might want to set up another email account for your job search.

Most importantly, never give your social security number to anyone online – even if they ask.

## Removing your resume when your search is over

When your search is complete, and you have found employment, make sure that you remove your resume from those sites where it has been posted (this is where keeping track comes in handy). Do not leave your resume up for your new employer to see and wonder if it is an old posting or new. You might also want to consider putting a posting date on your resume to avoid the risk of any miscommunication.

## Other ways to use the internet

In addition to job boards, there are several other ways to effectively utilize the Internet in your job search.

## Virtual networking

One way to further build your professional network is to search for potential contacts online. There are many different options for building your network by using the Internet:

- Professional Association/Organization sites: There are many association web sites, which allow you to post questions or ask for help on bulletin boards. These sites may also list the direct contact information for members
- Alumni web sites: Many employers maintain active alumni web sites including Deloitte LLP AlumNet website ([www.alumni.deloitte.com](http://www.alumni.deloitte.com)). Alumni web sites are a great virtual networking tool. Some sites will actually post jobs; others just have a directory of alumni who have taken the time to fill out a profile. In some cases, you will see that individuals have not listed their current company name, but might have listed their profession. This can still be of benefit to you as you seek to build your network
- Online Networking Communities: Networking Communities such as LinkedIn.com and Spoke.com create professional networks of linked contacts. Members invite their professional contacts to join, who invite their contacts and so on. Users can search for prospective job candidates, employers, or information linked to contacts and acquaintances. Online Networking Communities allow you to search for potential contacts by their current employer – if you are looking for a contact at a particular company, using these types of sites is a great strategy

When reaching out to individuals you have identified via virtual networking, always let them know how you came across their information and your purpose for contacting them. It is also important to conduct yourself in a professional manner and to thank them for their time. Always offer to reciprocate in any way that you can. For additional tips, see the Networking section of the Guidebook.

## **Company research**

Company research can take place during all stages of a job search – in the beginning when you start to identify and research potential job targets; in the middle as you research these targets and pursue networking conversations within these organizations; and towards the end when you secure an interview and want to be prepared for your conversation.

Company research can help you answer questions such as, “What is the company’s profile?” “Is the company financially secure?” “Who are the decision makers?” “Who are the company’s key competition and customers?” “What is the business model?” “Has the company been in the news recently?”

Don’t forget to consider company career pages as part of your company research strategy. Company career pages often offer information on company culture and benefits as well as job postings that may not be available on other job boards. Work to identify a list of key companies and plan on visiting their career pages on a regular basis.

## **Industry research**

Like company research, industry research can take place during all stages of a job search. As you develop your job search action plan, industry research can be an important part of the exploration process to understand the types of industries in which you may be interested and to validate whether or not moving to one of these industries is a viable career option. As you get deeper into your search, industry research can help you learn more about the key players, trends, and news that can help you find opportunities, land positions and be successful in your new position.

## **Occupational research**

If you’re considering changing fields, the Internet can be a good source for basic information on different careers including requirements, earning potential, occupational outlooks and trends, etc. Occupational sites can be a good start when researching a new career option, providing you with data needed to conduct an Informational Interview to help determine your interest and aptitude for a particular field.

# Interviewing

The interview is undoubtedly one of the most important aspects of your job search. The impression you make on an employer will likely be the reason you do or do not get a job offer. As previously discussed, the purpose of your resume is to obtain an interview – it is the interview that actually gets you the job. Preparing for an interview in advance can help lower your stress level and help you perform better during the process.

This first part of this section covers information on a wide array of interview formats, including:

- Phone Screens
- One-on-One Interviews
- Behavioral Interviews
- Case Interviews
- Panel interviews
- Lunch interviews
- Second Interviews

For information relevant to Informational interviews, please refer to the Networking section of the Guidebook.

The second part of this section contains information on preparing for an interview, questions to ask, interview attire, interview etiquette, ending the interview, evaluating your performance after the interview and dealing with rejection.

## Types of interviews

### Phone screens

In many cases, companies will use the phone screen interview as a first interview. This interview typically determines how you measure up against a profile of the ideal candidate. Individuals conducting phone screens tend to proceed in a logical, systematic fashion and often the interviewer must report their findings and opinions to the decision maker.

To prepare for the phone screen, make a list of your major attributes (e.g., problem-solver, financial expert, team player, cost-cutting specialist) and two or three specific examples to illustrate those qualities. This will help you promote yourself in response to any question you are asked. Also, review the list of requirements contained in the job description. Be prepared to discuss how your background and qualifications meet these requirements.

You will also want to prepare a set of questions to ask the interviewer, based on in-depth research into the organization and the outcome of the “Creating the Filter” exercise. It is as important to assess your filters and prepare corresponding questions as it is to gather information about the company. Some general guidelines for a phone interview include:



- Make sure you are in a quiet location
- Use a land line whenever possible. Cell phones tend to cut out and make conversation difficult
- Ignore or disable call waiting!
- Be direct and concise in your replies and be sure you understand exactly what information the interviewer wants before you answer a question. If you are not sure, restate the question and ask if you have understood it correctly
- Give positive, short answers and do not ramble. The interviewer can always ask you to expand, but it can be difficult for them to interrupt if you are talking too much
- At the end of the interview, you may be asked, “Is there anything else you would like to know?” One potential response: “I would be curious about any hesitations you might be having about my candidacy. I’d like an opportunity to address any concerns you might have?” However, always proceed with caution; you need to consider your audience and how this question will be perceived
- Don’t forget to ask what the next steps are; and the time frame around the interviewing process. This will let you gauge your timeline and be able to remain focused on the interviews, instead of worrying whether someone is going to call you back or not
- If the interviewer mentions that an in-person interview is the next step, ask what the interview style of the group will be (behavioral, panel, etc.). This will better help you prepare for an in-person interview

## One-on-one interviews

The one-on-one format is the most familiar and common format in job interviewing. One-on-one interviews involve a conversation between two people to determine whether there is a natural fit between the interviewer, the applicant and the available position. Both parties will leave this conversation with some kind of a judgment. The interviewer will know whether you can fulfill the responsibilities of the position, and you will know whether or not this is the right position, and company, for you to utilize and expand upon your talents.

The interview begins the second you and the interviewer first meet. This is the crucial time when nonverbal judgments are made. Lasting impressions are made within the first 10 seconds of meeting someone. Chemistry, or lack thereof, is determined and an opinion is formed based on appearance and body language. Basically, the interviewer is sizing you up: Are you dressed appropriately? Are you well-groomed and pleasant? Do you have a firm and comfortable handshake? A lot of close scrutiny takes place in those initial moments, and the interviewer can get a good idea as to how well the interview will or will not go based on his or her first impressions of you. After a bit of chitchat or warm-up, the questions begin.

In the one-on-one interview, recruiters and/or hiring managers are attempting to get a picture of your abilities to perform in the position that is available. They are also looking to see how you would fit in with the corporate culture. Often there will be a succession of one-on-one interviews within the same company. The process may begin with the human resources department, then move on to an interview with the hiring manager. It may then continue down the line to other members of a department.

In each one-on-one conversation, you must be prepared to discuss specific examples of situations which highlight your strengths. By doing this, you can leave the interview having confidence that you have communicated a positive and accurate picture of yourself.

In a one-on-one interview (and all other types of in-person interviews), it is extremely important to maintain eye contact throughout the conversation. A lack of eye contact can lead to a negative impression of you on the part of the interviewer.

Finally, after each interview ask the interviewer for a business card and promptly follow up with a Thank-you letter.

See Appendix F for samples of interview questions.

## Behavioral interviews

Behavior-based interviewing is built on the premise that past behavior predicts future performance. This approach to interviewing focuses on how the candidate has applied his or her skills in prior job functions. Instead of asking how you would behave in a particular situation, the interviewer will ask you to describe how you did behave. The interviewer is listening for specific examples of how you have handled situations or problems in the past. Expect the interviewer to question and probe (think of “peeling the layers from an onion”). The interviewer will ask you to provide details, and will not allow you to theorize or generalize about several events.

When presented with behavioral questions beginning with phrases like, “Tell me about a time when...” or “Give me an example of...,” the interviewer wants to hear your real-life examples. When interviewers ask such questions, they are listening for examples of how you handled situations similar to the ones you may handle for their company. This is your chance to talk about your accomplishments. If you can demonstrate through examples (preferably recent ones) that you have succeeded in certain areas of interest, you will position yourself to be considered a strong candidate for the position. After all, if you did it somewhere else yesterday, you can do it for this company tomorrow.

## Preparing for a behavioral interview

To be successful with behavior-based interviewing, you must have analyzed your experiences and know how to relate them to the current position the company is seeking to fill. If possible, obtain a job description for the position for which you are applying. Ask yourself, “What skills does the employer require?” Your success stories should include the situation, the action you took and the result.

- Analyze your own background. What skills do you have that relate to your job objective? That relate to the job description for the position?
- Consider competencies that are common from company to company: leadership, teaming, creativity, working under tight time constraints, client service, management effectiveness, and decision making
- Identify examples from your past experience where you demonstrated those skills. How can you tell a story about your use of particular skills or knowledge? Concentrate on developing complete STAR (Situation, Task, Action, Result) answers and remember that a good story has a beginning, middle and end
- Wherever possible, quantify your results. Numbers illustrate your level of authority and responsibility
- Be prepared to provide examples when results did not turn out as you planned. What did you do then?
- Before starting the interview process, identify two to three of your top selling points and determine how you will convey these points (with demonstrated STAR stories) during the interview
- Be detailed yet concise when providing your response – do not ramble, provide a lengthy back-story or use language/acronyms that the interviewer would not be familiar with
- Practice the delivery of each specific example, until it is smooth and you feel confident

And remember, you can use the stories you prepare even when the interviewer does not ask behavioral questions. If you are asked a traditional question, you can use your prepared story prefaced with, “I can give you an example of a time when I used that skill on a previous job.”

By preparing ahead of time and recalling your past successes, you will be able to have examples in mind and will not be caught off guard. There is no way you can predict what the interviewer is going to ask you, but you can prepare what you want to convey about your past and how it might relate to your future performance at the new company.

See Appendix F for sample behavioral interview questions.

## Case interviews

The case interview evaluates applicants' analytical skills while introducing them to the kind of tasks they may confront in the job. Case interviews are common in several industries, including business consulting, investment banking, technology, law, marketing and finance.

In the case interview, the interviewer presents you with a real or simulated problem to consider. When faced with this type of question in an interview situation, you must remember that what interviewers are looking for is how the job candidate breaks a problem down into manageable pieces, thinks under pressure, and their ability to be convincing and persuasive, not whether they get the correct answer. Therefore, focus on how you are going to approach the problem rather than finding the right answer. You should also realize that these cases are designed to be challenging and it is likely you do not have enough information to provide/find the correct answer anyway.

## Case types

There are several different kinds of cases that may be presented in an interview setting. The two most typical kinds of cases are Actual and Theoretical client questions. Interviewers sometimes also design case scenarios relating to the work experiences described on your resume.

## Actual or theoretical client questions

A standard type of case question you can expect is an Actual or Theoretical client situation. These cases may be presented in a written or verbal format. The types of questions you can expect are similar to the following:

- The New York City Public Schools are running a deficit. What would you suggest they do?
- Ford is considering the release of a new model. What issues need to be thought about?
- Two engineers want to start an interactive multimedia business. What is your advice?

## Preparing for a case interview

- Practice! You can practice with friends, family, a tape or video recorder, in your car, or in front of a mirror
- Read business periodicals. When you see a news story about staff reductions or an acquisition that a company is announcing, ask yourself, "Why would a firm do this?" and then read on to see if you hit on some of the key reasons
- Contact people in your network who are in consulting. They can give you advice on the case interview
- Check out consulting firm websites such as McKinsey or Bain for hints and sample case interview questions
- Review books on case interviewing. These books give sample case questions, approaches and answers: The Harvard College Guide to Consulting Case Questions; The Vault Reports Guide to the Case Interview; Ace Your Case! The Essential Management Consulting Workbook

## Approach to answering case interview questions

When approaching either type of case interview question, you should ask yourself the following:

- What additional information do I need to know?
- What are the key issues to be addressed?
- What are the key findings from the analysis?
- What is my hypothesis for the solution?
- Have I summarized my thoughts?

Then, use the following steps to help guide your response to the case interview question:

- **Clarify the question:** After listening carefully to the case description, you can clarify the question by repeating it back to the interviewer or even asking questions to clarify the case. A case interview is a conversation, so clarifying questions are encouraged
- **Structure your response:** Once you understand the case, identify the key issues and organize your response. “The key issues I am focusing on are...”
- **Develop a framework:** Keep in mind that the focus is as much on your approach as your solution. Approach the problem first in terms of breadth, then depth
- **Analyze issues and test hypotheses:** Discuss potential findings, present alternatives and hypothesis for future testing and discussion. You can use a sketch here (i.e. matrix or flow chart) if it is helpful
- **Summarize the case**

In solving any real-world problem in business, you typically have to go through the process of brainstorming some ideas, some of which are not going to work. If you can demonstrate to the interviewer that you can do that with the case question you give them useful information, even if you do not actually come up with the answer.

Just remember that smart interviewers will care most about how you approach, analyze and break down a problem – not the answer itself.

## Panel interviews

During the course of your job search, you will likely face situations which involve interviews with more than one person. Board or panel interviews are usually rather formal and organized, using a standard set of questions for all applicants. This type of interview is typically used in academia, government or for high-level executives, but can be used for any other type of position in any company. In some instances, a panel interview can occur when a group of interviewers takes a candidate out to lunch (see next section). A common mistake candidates make is forgetting that the lunch is actually a formal panel interview in disguise – do not let your guard down or conduct yourself in an overly casual manner.

In a panel interview, be sure to shake hands with each person. Ask for business cards and if possible, jot the names of the interviewers down in the order they are seated in your notes. This will help you with remembering names and will allow you to address the members of the panel by name when they ask you a question.

It is also important to make frequent eye contact with all interviewers so that they feel included. When asked a question, look at the person as they ask you the question and continue to look at them for about 30 seconds or so. Then, shift your eye contact to each member of the interview panel as you continue to provide your answer. Just remember that the interviewers are working together toward the same end and therefore, you should treat them equally, not favoring one over the other.

Finally, after the interview, remember to send thank you notes to each panelist.

## Lunch interviews

On the first or second interview you may be asked to go out to lunch. A lunch interview provides an opportunity to interact with the interviewer/s in a different environment. During a lunch interview, the “interview team” may seem more relaxed; however, you need to continue to conduct yourself as you would during a typical one-on-one or panel interview. Avoid becoming overly casual or friendly. Also, avoid saying something you would hesitate to say in an office environment. When in doubt about saying something, it is best not to. Finally, don’t forget to use your table etiquette and order something that is easy to eat.

## Second interviews

Second round in-person interviews indicate serious interest in you on the part of the company. The first interview often focuses on whether you are a fit with the company, while the second interview focuses on whether you are the best candidate for the job. Therefore, in a second interview you will share your qualifications in greater depth with one or more individuals at the company. You can ask the HR/Recruiting Manager what the style of the interviews is going to be and prepare accordingly. As with all interviews, you must do your homework and prepare your responses and questions in advance. If you feel you did not have the opportunity to highlight a certain characteristic or strength, then this is your chance to adjust your interview style and “bring your A game.” However, since you are likely meeting different people, you can also expect to be asked some of the same questions, such as “Tell me about yourself”, and you should be prepared to answer these questions as well.

If testing is required, it may be scheduled before or after your interview.

If travel or an overnight stay is involved, be sure to keep your receipts as most employers will reimburse any expenses you incur.

After each interview, it is imperative that you send a thank you note. Thank you notes can be emailed or hand written. Be sure to proof-read your thank you notes and take your time writing them.

See Appendix E for sample Letters.

## Preparing for an interview

Being well prepared for the interview is the most important thing you can do towards ensuring your ability to communicate to the interviewer that you are the best candidate for the job. Here are some key things to consider for your preparation:

- Make sure that you have done your research on the company with which you will be interviewing. Start by going to the company website. Besides telling you about financials, products and services, it will also give some insight into the company culture and commitment to technology. Use the information to demonstrate your knowledge and interest during the interview
- Ask your HR Manager or Recruiter if they could supply you with basic information (biographies) on your interviewers. If biographies are not available, try to find out their names ahead of time so you can Google the interviewers. That way, you will be prepared to ask them questions about their career with the specific company
- Prepare your 30-second Elevator pitch; it is a 30-second commercial about yourself. Utilize this information in response to the “Tell me about yourself” question
- Prepare answers to 10 of the most common interview questions:
  - Why did you leave or are you leaving your last position?
  - What do you know about this company?
  - What are your goals?
  - What are your strengths and weaknesses?
  - Why are you interested in this position?
  - Why do you want to work for this company?
  - What has been your most significant achievement to date?
  - How would your last boss and colleagues describe you?
  - Why should we hire you?
  - What are your salary expectations?

- Prepare answers for any topic that you are concerned or feel uncomfortable about. If there is something that you do not want an interviewer to inquire about, you can be sure that somehow the interviewer will sense it and ask. Practice your answers out loud often enough to feel confident when saying it. Maintain poise and self-control. Consider how that difficult issue has been a learning opportunity and has made you a better person
- Rehearse, rehearse, and rehearse. Develop your Behavioral Interviewing question responses and practice your facial expressions, eye contact, handshake and body language. Review likely interview questions and practice answering them. You may consider a mock interview with a friend or colleague. A mock interview will not only help you perfect your technique, but it will also allow you to get valuable feedback and coaching on your performance. Working with a friend and getting feedback will enable you to learn where your strengths lie and where you may need work to improve your performance
- Make sure that you have reviewed your resume thoroughly, studied the chronology of events (if there are any gaps in your resume be thoroughly prepared to answer those questions), as well as be able to highlight one to two accomplishments from each work experience. Remember to organize your accomplishments in the STAR model: Situation, Task, Action, and Result. Be prepared to explain in detail, each event, affiliation, certification, etc., that you have listed, particularly if you have borrowed words and phrases from the internet and/or resumes of others. Know your resume
- Allow at least two hours for the interview. Some employers want to spend the better part of a day with you, have you meet a number of people, tour the facility, take pre-employment screening tests and so forth. It is a mistake to seem rushed, constantly checking your cell phone or to leave the impression you have more important things to do than participate in the interview
- Review the Interview Attire/Etiquette portion of the Guidebook: Dress as though you are ready to go to work. Professionals tend to dress professionally
- Make sure you know where the company is located if it is a face-to-face interview. Get directions a day prior leave early, so you do not run the risk of being late
- Take these items with you to the interview:
  - Several copies of your resume on quality paper.
  - A copy of your references.
  - A pad of paper on which to take notes.
  - Directions to the interview site.
- Go alone – do not bring a friend or relative. It may sound obvious, but it has been known to happen. If someone needs to drive you to the interview, leave him or her outside the building. Arrange to meet after the interview

Arrive a few minutes early. Always make sure you allow extra time if you are unfamiliar with the location.

## Asking questions

Asking insightful questions sets you apart from the rest of the pack of applicants. Not asking questions during an interview is a missed opportunity to find out information about the company. Questions demonstrate that you have done your homework about the company, and that you are as interested in finding out how you will fit in, meet the job's challenges and achieve your career goals as they are in learning if you are the right person for the job. In many cases, the questions you ask in an interview can be more revealing than the answers you give. Recruiters and hiring managers are looking for candidates who ask insightful questions throughout the recruitment process. They see your questions as clues about your analytical skills.

In preparing questions for the interview, you need to discern what information you need in order to decide whether you want to work at this company. You should make a list of at least 10 questions to take with you to the interview. To determine which questions are important to you, collect your Creating The Filter list of less/important, salary, benefits, travel reqs, etc., and work your questions backwards. However, you should also realize that the best questions will come as a result of your listening to what is asked during the interview.

Depending on who is interviewing you, your questions should vary – always consider your audience when formulating questions:

- If you are interviewing with the hiring manager, ask questions about the job, the desired qualities in the successful candidate and the challenges of the position
- If you are interviewing with the human resources manager, ask about the company and the department
- If you are interviewing with management, ask about the industry and future projections. This is your chance to demonstrate your industry knowledge

To be on the safe side, it is best to concentrate on questions about the job's responsibilities and how you fit the position until you get the actual offer. Particularly during the first interview, it is premature to ask about benefits. "What's in it for me?" type questions can be interpreted as self-centered and a sign of your lack of interest in the job. However, if compensation and benefits are a part of your "Creating the Filter" exercise, then these are important questions to ask the HR Manager/Recruiter at the tail end of the interview process.

While it is best to customize your questions to each company and position based on your pre-interview research, here is a list of general questions to help get you started:

- Can you tell me about the culture here?
- How do you see me contributing to the success of the firm?
- What would you see as the top priority for me if I were hired for this position?
- What is the career path for this position (opportunities for promotion)?
- What qualities are you most hoping to find in the people that you hire?
- Do you have any concerns about my ability to do the job? (If so, then you can follow-up with response to counteract their concerns)
- How would you describe the relationship between the executives of the company and the staff?
- What would you say are the three major responsibilities of this position?
- What would you say are the three major attributes a person would need to succeed at this position? In this organization?
- What are the travel requirements of the position?
- What training is available that would assist with this role/function? What training could I take on my own that would assist me to succeed in this role/function? Are there opportunities for cross-functional training that would allow me to move into other roles within your corporation?
- Would you tell me about how your career got you to this point?
- Why did you (the interviewer) select this organization? How long have you been with them and what is it about this organization that keeps you here?
- What is your greatest source of job satisfaction?
- What do you see as the opportunities for greatest growth in this position or within this organization?
- Describe a typical day for someone in this role?
- Why is this particular position open? (Who held it last, why did they leave?)
- What will be the biggest challenges for someone taking on this position?
- Do you have a formal performance evaluation process? (What method is used and how often are evaluations held, are evaluations linked to merit pay increases or is process separate?)
- What will my first assignment be in this position?
- What do you see as the outlook for the organization over the next five years? (Are you aware of any major changes on the horizon – impact of legislation, specific new clients, etc.?).

You may not have as much time as you would like to ask all your questions, so plan to ask your most important questions first, in case the interviewer closes the interview before you reach the end of your list.

When you begin to think of the interview as a two-way process, you will see it is important for you to find out as much as possible about the company. Questions will give you the opportunity to find out if this company is a good place for you to work before you say “Yes” to the job offer.

## Interview attire

Many companies have changed their dress policy to include business casual dress. However, for interviewing, appropriate attire usually means business attire in most situations. You should dress in a conservative and professional manner. Remember, you only have one chance to make a good impression.

### Guidelines for men:

- A two-piece suit is appropriate in most instances
- Solid colors and tighter-woven fabrics are safer than bold prints or patterns
- Bright ties bring focus to the face, but a simple pattern is best for an interview
- Wear socks high enough so no skin is visible when you sit down and cross your legs
- Refrain from wearing earrings or other jewelry for body piercing

### Guidelines for women:

- A suit with pants or a knee-length skirt and a tailored blouse is most appropriate
- Although even the most conservative organizations allow more feminine looks these days, accessories should be kept simple
- Basic pumps and modest jewelry and makeup help to present a professional look
- Make sure there are no runs in your hosiery if you choose to wear a skirt

### Guidelines for both genders:

- Make sure your hair is neatly trimmed
- Do not wear perfume or aftershave – the interviewer may be allergic to the scent or you may be wearing a fragrance that evokes an unpleasant memory
- Be sure your shoes are polished (consider wearing your sneakers on the way to an interview and changing before you enter the interview site)
- Check to make sure you do not have missing buttons, crooked ties, lint or pet fur
- You want your experience and qualifications to shine. Your appearance should enhance your presentation, not overwhelm it

## Interview etiquette

- Acknowledge introductions with a smile and a firm handshake. Remember not to break the interviewer’s hand. Maintain good eye contact and smile when appropriate.
- Be enthusiastic and responsive. Radiate energy. If you tend to be a quiet person remember that passion and energy can be communicated both through the words of your stories and your body language (e.g., sparkling eyes and tone of voice).
- Sit comfortably without slouching. Do not put anything on your lap or in your hands as it will restrict your natural body movement or you may be tempted to play with it. Keep your clipboard, note pad, or portfolio on the floor beside your chair or on the interviewer’s desk, with their permission, for easy retrieval. Take notes when you are obtaining clarification about your questions.
- Respond to questions specifically and concisely but give sufficient details to enable the interviewer to evaluate your credentials. Remember your STAR stories. Interviewers become frustrated when they have to listen to long rambling answers.



- Think before you speak. It is quite acceptable to pause before talking in order to organize your thoughts, but **think quietly**. Avoid verbal fillers such as “um,” “ah,” or “you know” and repeating the question in order to provide thinking time. Use business language. Speak clearly. Avoid slang. If you would not use the word in front of your grandmother, do not use it in an interview.
- Answer questions truthfully. If you are playing a game in order to get hired, you will be found out once you are on the job.
- Be polite. Show respect to everyone you meet, whether it is the boss, the receptionist or a prospective coworker.
- Think about what the interviewer really wants to know. Think of yourself as a retail product with features and benefits you want to sell, and gear your answers accordingly. (Remember your elevator speech and creating your story.)
- Never, ever ask about salary, vacation or other benefits during a job interview. Doing so communicates that you are only interested in what you are going to get out of the job. Remember, the point of the interview is to communicate what you have to offer the employer, not the other way around. The time to talk about money and other goodies is after the employer has offered you the job.

## Ending the interview

When it appears that the interviewer is about to end the interview, there are certain points you should make sure you have covered before you leave the room:

- Reiterate the timeline that was given to you. Understand the complete interview process (e.g., another interview in same/other location, meetings with other individuals in organization, etc.)
- Express your interest in the position and thank the interviewer for taking the time to interview you
- Ask for a business card or ensure that you have the interviewer’s name, title and address so that you can send a thank-you letter
- Follow up regardless of whether you thought the interview went well or not, be sure to send a thank you note or email to the interviewer expressing your gratitude for the opportunity as quickly as you can. Within a day is preferable

## Evaluating your performance

Evaluate how well you did after each interview. Ask yourself the following questions:

- What challenges did I face?
- What could I have done differently?
- What did I learn during the interview?
- What points did I make that seemed to interest the employer?
- Did I present my qualifications in the best manner possible, giving appropriate examples as evidence?
- Did I pass up opportunities to sell myself, to demonstrate the work I do, and to show how profitably I could do it for both the organization and myself?
- Did I talk too much? Too little?
- Was I too tense? Passive? Aggressive?
- What do I need to learn for future interviews?
- What feedback do I need to give my career consultant to better help me and others prepare?

## It’s been a week and no word from the Interviewer?

If it has been over a week since the interview and you have not received word yet from the company, call the person with whom you interviewed or the HR Manager/Recruiter. Remember to speak only with them, since they

are the one that knows the particulars of your situation. On the phone, keep the same professional attitude that you had in the interview. Tell them again how interested you are in the position and ask what the next steps are.

Keep in mind that the interviewers, HR Managers/Recruiters are busy a full work week may go by and you do not receive any feedback, each painstaking hour is ticking by, however, it is not the same for them. They are continually busy and hiring for multiple positions with multiple candidates, consider “no news is good news”. It is acceptable within three business days to follow up with the HR Manager/Recruiter. If you do not hear anything in a business week you can follow up again.

## Dealing with rejection

You have remained upbeat during the process, hoping to get an offer any day, and instead you receive a form letter or a call saying you have not been chosen for the position. If you feel let down, you are not alone. Remember to remain polite and respectful even if you decide that you are no longer interested in the job or will likely not be offered the position. You never know when you will meet the interviewer again, or a better opportunity will arise at the company.

When you receive a rejection, you need to keep things in perspective and give yourself some credit. Recruiters often receive more than 100 resumes for an open position and yours was chosen as one of the top few for an interview. Therefore, you likely beat out more than 90-95% of the applicants to be one of the top candidates interviewed in person. True, someone else got the job and you did not.

When rejection happens, it may cause feelings of being ignored, inadequate, powerless, isolated, humiliated or depressed. Any combination of these emotions is quite normal. You may feel hurt angry after being put through a long interview process, only to end up on the rejection list.

Instead of allowing a feeling of rejection to act as an obstacle, try to stay positive and focus on what you have gained from the experience. Consider the following gains:

- Opportunity to practice your interview technique. There is nothing like first-hand experience to learn how to talk about yourself in clear, honest, effective ways.
- Obtain referrals to other people: Ask the interviewer to suggest names of other organizations where you might inquire.
- Get feedback on your strengths and weaknesses: Ask the interviewer to tell you what you did well and what he/she would recommend you do better.
- Gather more information about the field of work – every contact increases your body of information about the field where you want to be employed.
- Maintain emotional resilience: Toughness and having a positive attitude come from bouncing back from rejection by not taking it too personally and recognizing you are a survivor.
- Find out what you do not want. Truthfully, 90% of what is out there we do not really want. It is better to find out first-hand instead of being surprised later.

Remember to keep your pipeline full: If you have your game plan in place and a full pipeline of jobs then the rejection is easier to take since you can just cross it off and move onto the next one on your list. Review your interview performance. If you were unsure of one of your answers, review it and rethink it, with some practice you will hit it out of the park next time. Continue to work on your interview skills and evaluate yourself after each interview (see above). Remember the old adage “Practice Makes Perfect.” Eventually, you will find the right position for you.

## Interview prep at a glance

### What to do the night before:

- Do you have a portfolio/pad of paper and pens ready?
- Are you prepared with your responses (STAR examples), questions and information about the company?
- Do you have your 30-second Elevator pitch memorized?
- Do you have multiple copies of your resume, printed on quality paper?
- Did you confirm the directions and time of the interview with HR/Recruiter?
- Do you have your interview attire ready?
- Do you have the name of the person you are interviewing with?

## During the interview

### The Interview

There are numerous things to remember during your interview, and nerves can get the best of all of us. However, remain calm and confident, and follow these tips to make the best impression in your interview:

#### Give a firm handshake

When entering and when leaving the interview, give the interviewer a firm, professional handshake.

#### Maintain eye contact

Look at the interviewer when talking or listening. This shows that you are interested in the conversation and have respect for the other person.

#### Take your time answering questions

If you are unsure of how to answer a question that is asked of you, take a minute to think about it and formulate the best response. It is better to wait before answering and then answer intelligently than to jump immediately at the question with a poor answer.

#### Remain professional

Sit with an upright posture, speak and answer questions clearly, listen when the interviewer is speaking, and stay professional regardless of how you feel the interview is going.

#### Thank the interviewer

Do not forget to thank the interviewer for their time when the interview is over.

# Offers and negotiations

## Salary negotiation

During the prescreen process, it's likely that a recruiter or potential employer requested your salary requirements and you provided current salary and a range for your expectations. In general, after that, it is best to let the prospective employer initiate any further conversations around compensation. Once you have been identified as the desired candidate for a position, you have more negotiating power and should arm yourself with information to successfully negotiate any job offers.

## Planning for salary discussions

There are three key steps in preparing and planning for salary discussions with prospective employers:

- **Determine minimum salary requirements.** You should know your bottom line or minimum financial requirements to meet your household budget and expenses. Never discuss this figure with anyone during the recruiting process.
- **Understand your competitive market value.** Be prepared and know what your skills are worth in the marketplace. Sources for this information include:
  - Salary-related websites
  - Search firms
  - Salary surveys in professional journals

### Online resources for salary information

Here are some websites that can help you establish salary norms for the type of position you are pursuing:

<a href="http://www.bls.gov">www.bls.gov</a>	<a href="http://www.wageweb.com">www.wageweb.com</a>
<a href="http://www.jobstar.org">www.jobstar.org</a>	<a href="http://www.salary.com">www.salary.com</a>
<a href="http://www.homefair.com">www.homefair.com</a>	

- **Determine your ideal salary.** Think about a salary that would put you on cloud nine, but keep it realistic.

At the conclusion of this exercise, you have three salary figures – a minimum, a realistic desired salary that is your midpoint and an ideal salary, which is your maximum. As mentioned, your minimum salary is for your information only, and should not be discussed with anyone. The two remaining figures make up your salary range, albeit that the range is really the top half of what you would accept. Using this range gives you an advantage in the negotiation process, since it is always easier to negotiate down than up.

## Negotiating the salary

These guidelines can help you be successful in the salary negotiation process:

- Prepare thoroughly for salary negotiations, including conducting research on the salary you should expect for the specific type of position you are seeking
- Try to market yourself to more than one employer to compare offers and career opportunities

- Let the employer make the first salary offer. If asked, say you expect a salary that is competitive with the market – or give the salary range you determined in the planning phase. Do not feel obligated to accept the first salary offer, negotiate salary if the offer made is inadequate
- Do not accept the first viable salary offer you receive if you are not sure about the job or the company. Delay salary negotiations until you know exactly what the position entails – clarify responsibilities, health benefits, 401K, pension, bonus potential, paid training, etc. as much as possible
- Try to obtain other concessions (shorter review time, sign on, moving expenses) or benefits (other bonuses, vacation time) if you are not successful at negotiating the salary you want
- Get the offer, including all the details, in writing
- Do not accept the first acceptable salary offer you receive if you are not sure about the job or the company
- Ask for time to consider the offer of employment to evaluate salary and benefit options

When an offer is extended, ask any remaining questions. Responses that were received during your interview process along with the following can impact your salary expectations and your consideration of the overall job offer.

### Department and company

- Do you anticipate any expansion plans for this department?
- What market areas does the company anticipate developing?
- Are there any plans for mergers or acquisitions?
- What production and employee lay-offs and cutbacks have you experienced in the last three years?
- Do you anticipate any production cutbacks or employee layoffs? How are they likely to impact this department?
- When was the last corporate reorganization? How did it impact this department?
- When will the next reorganization occur? How will it likely impact this department?
- Is this department a profit center? How does that affect remuneration?

### Future salary

- When discussing future compensation as a part of an offer negotiation, here are some arrangements to consider:
  - Lump-sum signing bonus
  - Short-term performance review with salary adjustment attached
  - Title promotion and raise after two to four months
  - Year-end bonus
  - Items other than cash

### Evaluating an offer

When an offer is made, be sure to evaluate the entire compensation package – not just salary. Benefits can add up to 30% to your total compensation! Here are some commonly offered benefits or perks to factor into your evaluation process:

- Medical insurance – consider co-pays, deductibles, percent coverage, employer paid premiums vs. employee contributions
- Dental insurance – consider co-pays, deductibles, percent coverage, employer paid premiums vs. employee contributions
- Vision care insurance – consider co-pays, deductibles, percent coverage, employer paid premiums vs. employee contributions
- Life insurance

- Accidental death insurance
- Business travel insurance
- Disability insurance and company sponsored disability plans
- Vacation days
- Paid holidays
- Paid sick leave
- Personal days
- 401(k) plans, including employer matching
- Pension plans
- Profit sharing
- Stock options/ESOPs
- Deferred compensation
- Tuition reimbursement
- Health clubs allowances
- On-site/back-up childcare assistance
- Car or car allowance
- Dependent care
- Employee assistance program
- Overtime/travel premiums/compensation time
- Parking, commuting, expense reimbursement
- Relocation expenses
- Flexible work arrangements

As you evaluate the offer, consider the following questions and their relative importance to you. Your results from the “Creating the Filter” exercise can serve as a useful resource to help you assess relative importance.

- Do you like the work?
- Can you be trained in a reasonable period of time and therefore, have a realistic chance of success?
- Are you able to transfer skills and experience from previous jobs to contribute to your success in the new organization?
- Are the responsibilities likely to provide you with a challenge? Will you have sufficient autonomy in your role?
- Is the opportunity for growth and advancement compatible with your needs and desires?
- Will the company provide support for your professional development, including support for continuing education, training and mentoring?
- Are the company's location, stability and reputation in line with your needs?
- Is the stability and growth potential of the industry in line with your needs?
- Is the culture of the company conducive to your enjoying working there?
- Can you get along with your new manager and immediate co-workers?
- Is the senior leadership of the organization a reputable and high-quality group?
- Will the position provide you with a lifestyle, including work hours and travel requirements, that is suitable for you and your family?
- Is the salary and total compensation package the best you can get?

## Multiple offers

In a tight job market, multiple offers sound too good to be true. However, if you find yourself considering more than one offer, do take time to evaluate the offers carefully or else you could find yourself searching for a job again soon.

How do you choose the right one? You have done your research and know the backgrounds of the companies, but there is something more you need to do before you make your decision.

You need a strategy to evaluate the offers. A simple way to do this is to put together a spreadsheet with the company names across the top and your values and needs listed down the left hand side. Under each company's name, assign a score from 1 to 10 for each of the items in your values/needs list. A sample of the spreadsheet with your top five values might look like this:

Value	Company 1	Company 2
<b>Security and Stability:</b> Laid off twice in the past five years, and looking for a home with a solid company.		
<b>Personal, Family and Work/Life Balance:</b> A top personal value is family. Worked over 60 hours each week in last job. Not eager to get back into that work frenzy again.		
<b>Meaningful Work, Make a Contribution:</b> Want to feel work means something in the bigger picture, and that I am contributing and making a difference.		
<b>Location:</b> Goes hand-in-hand with balance. If I have to spend three to four hours a day commuting, it means time spent away from my family. Telecommuting a couple of days a week may be a possibility.		
<b>Salary and Benefits:</b> Important, but not as important as the other values. I want to be paid what I am worth, but would be willing to negotiate to get some of my other needs met.		
<b>Total</b>		

Total the columns and compare overall scores. You may find, for example, that although one of the companies offers more money, the risks are higher and the time away from your family may not be worth the extra dollars. This approach allows you to see how your priorities affect your decision. You do not necessarily have to accept the offer with the highest score. The purpose of evaluating the job offers in this manner is to understand how your values and needs are addressed by each position and then being able to make a decision with your eyes open to the trade-offs you may be faced with making. See Appendix H for a copy of a blank worksheet and a sample of a completed one.

There are always variables that cannot be predicted when accepting an offer, but using an analytical approach can help you make a more informed and objective decision. Making a bad decision can result in your being miserable and feeling unfulfilled, but unable to leave because you have only been in the job for a few months. It is always best to evaluate any offer, but if there is more than one offer to choose from it is essential.

## Declining an offer

Many job seekers feel lucky to receive any job offer, especially when unemployment levels are high. But whether the compensation is too low, the location is inconvenient or the job is not the right fit, sometimes you need to say, “No thanks.”

In a stress-filled job search, it is tempting to only turn down an offer verbally; however, it is more professional to decline the offer verbally and in writing. Keep these four tips in mind:

- **Be Prompt:** As soon as you have made your decision, call the hiring manager and write a letter declining the offer. The company will need to offer the position to someone else, and you do not want to hold up the process.
- **Be Courteous:** Your letter should be professional and courteous. You may be turning down this position, but you might want to be considered for future opportunities. Smart job seekers use every possible chance to network, so thank each person with whom you interviewed and wish them and their company continued success.
- **Be Diplomatic:** If you have received another, more generous offer, avoid mentioning the details of the position you are accepting. Let the hiring manager know that you were impressed by the company and carefully considered the offer, but you are accepting a position that better suits your career objectives.
- **Be Concise:** This is not the place to tout your credentials and career accomplishments. The company already realizes your value, so keep your letter short and sweet.

## Reneging on offers

At some point during your job search, you may find yourself considering multiple job offers. While it is great to feel in demand, multiple offers can pose a dilemma. What do you do if the first offer received, while representing a good career move, is not your ideal position and you believe the dream job could be just a phone call away? How long can you hold out before accepting or declining the other offer?

Not treating any offer or future employer with full respect can mean that two job offers quickly turn into none and you create bad feeling along the way with potential employers. It is safe to say that industries are small enough to have a close knit group of recruiters and you do not want to be the name that everyone remembers; and not for a good reason.

Once you have decided on a specific employer, you should accept the offer in good faith, notify other employers of your decision, and withdraw yourself from the recruiting process. If you renege on a job offer, you may be “burning your bridges” and it could come back to haunt you later.



## Sample decline letter

September 7, 2004

Judy Larson  
Director of Human Resources  
ABC Company  
1200 Grand Avenue  
Kansas City, MO 64106

Dear Ms. Larson:

Thank you for offering me the assistant manager position in warehouse operations. Regretfully, I must decline your offer as I have accepted a position with another firm. While I was very interested in the opportunity and working with your team, the position I accepted is better matched to my credentials and career aspirations.

Thanks, again, for taking the time to meet with me and for the generous employment offer. I am impressed by ABC Company's mission, values, goals and commitment to quality and service. I wish you and your colleagues much continued success and hope that we meet again in the future.

Kind regards,

Tim Woods

# Starting your new job

Starting a new position is an exciting process, but also a critical one. Taking a few key steps in the beginning can be invaluable in setting the stage for your success. First impressions are key and your reputation with your new organization will be built, in part, on the way you are perceived during the first weeks in your new role. Setting expectations and goals upfront can also make a positive impact and get you started on the right foot. Here are a few important things to keep in mind.

## Preparing for the first day

Be well rested and prepared for your first day at your new company. You might want to pick out what you plan to wear and get your brief case, etc., ready the night before so that you are not rushed or running late. Be on time or even early. It is also a good idea to prepare mentally for the big day and write down your thoughts on the following:

- What are the top three things you hope to learn or accomplish?
- What is your understanding of your new role?
- What projects do you perceive to be the most important?
- What projects or aspects of your position are you most excited about?

## The first week

Again, you will be making your first impression on many of the people you will be working with during your first week with the organization. A good rule of thumb is to give 110% in your first weeks — this will help to set a positive tone and positively influence the way others view your work ethic, attitude and effectiveness.

## In general

- Be sincere, positive, eager and energetic.
- Recognize that your co-workers will be busy, so may not be able to readily devote time to you — be patient.
- Do not offer your life story to new co-workers. Take time to get to know them.
- Be on time to meetings or appointments, as well as to the office each day.
- Carefully complete all paperwork for your new position.
- Be open, willing, and start learning.
- Ask questions and take notes on what you learn. This will prevent you from having to ask the same questions over and over.
- Be positive and do not engage in negativity, even if your co-workers are.
- Make an effort to establish relationships. If confronted with a personality clash with another co-worker, make every effort to find a way to work effectively with that individual. Recognize the contributions and areas for improvement that you each bring to the table.
- Obtain a job description if available, if not, offer to create one.
- Learn your chain of command.
- Acknowledge others for the assistance and guidance that they provide you.

## Regarding your manager

This is a great time to set expectations and make sure that you and your boss are going to be on the same page moving forward. Talking through work styles and best means of communication can be helpful too. This will be a good time to help frame and mold your new position to whatever extent you can, rather than having that done for you.

- If it is not done already, schedule time with your new manager to discuss and define goals and expectations of your new position.
- Establish goals for your new position. Nail down expectations of the first ninety days, six months, and first year, if possible.
- Using what you wrote down the night before your first day, compare notes about your goals for this week.
- What general learning about your position and the company are important for you to focus on?
- What projects demand your immediate attention and what are some longer-term projects you can get a head start on? Be sure to understand key deadlines and milestones as well as expected communication points.
- Who are the key people you should introduce yourself to and/or schedule meetings with?
- Are there discrepancies between your manager's expectations/assumptions/perceptions/style and yours? Now would be a good time to discuss those and reach consensus. Get to know your manager's style by having a conversation around the following questions:
  - How would you like me to update you on my work progress? Do you just like to see finished products and projects, or would you rather be updated periodically throughout a project? How often would you like to be updated?
  - Would it be beneficial to schedule weekly/monthly one-on-one meetings?
  - What are the top three projects I should focus on right now?
  - Of all my job responsibilities, which one(s) do you feel are most important for me to master quickly?
  - If I need to communicate with you, do you prefer e-mails, voicemails, phone calls or face-to-face meetings?
  - Given the company culture, how can I best follow the correct "chain of command" when suggesting new ideas or taking action?
  - What is your preferred style for conducting meetings?
  - Are there any political issues in our department or division of which I should be aware? How will these issues affect my job?
  - In addition to you and my immediate co-workers, are there other employees with whom I will be interacting on a regular basis?
  - How can I contribute to a positive atmosphere in our department or team?

## Staying organized

You will likely be presented with a lot of new information during the first week of a new job. You need to get yourself organized using whatever method works best for you to avoid becoming overwhelmed. Establish a system to manage your time, tasks, deadlines and meetings effectively. If you have not done so already, be sure to get exposure to the systems used in the office voicemail, e-mail, databases or any proprietary software. These things may take time to learn and slow you down a bit initially.

## Building new relationships

Based on discussions with your manager and some of the exposure you have already gotten, make a list of some of those key people you have identified who you should begin to meet with. Start getting those meetings scheduled. There are multiple benefits to this: First, it will begin to establish relationships and possibly friendships with your co-workers. Second, it will show your initiative and desire to be successful. Third, it will hopefully provide you with some key information that will serve you well in your new role. Fourth, it will help you in forming your

internal network, which can be invaluable throughout your tenure with the organization and even beyond. Here are a few ideas of things to cover:

- How does your role interface with their role and what expectations should be discussed?
- What can they share with you regarding the culture of your function/division, their function/division and the company as a whole?
- What key advice can they share with you that will help you to be successful?
- What should you know about your boss and ways to best be successful with him/her? What is the best way to approach your boss for feedback or assistance (hopefully this was covered to some degree during your previous meeting with your boss, but it can be helpful to get another perspective)

## Key company information

If you are not well versed in some of the office logistics yet, now would be a good time to make sure you are familiar with key processes and systems. A few things to get information on if you need to:

- Who do you need to contact regarding benefits, W2, 401K, etc.?
- Is there required training you need to be aware of?
- How do you obtain any required items such as a cell phone, calling card, corporate credit card, etc.?
- How do you make travel arrangements? Who is the key contact and what are the key policies tied to that process?
- Where do you go when you have an IT issue?
- What's the procedure for ordering office supplies or requesting expense reimbursements?
- Anticipate individuals/departments you will need to work with and understand how best to facilitate that. Contact them and ask questions

## Regrouping with your supervisor

Now that you are about to finish your first week with your new organization, it would be a good time to reconvene with your manager to fill him/her on what you have accomplished this week and to see how you are doing in meeting his or her expectations. If there is a breakdown, it is best to understand it and remedy it as soon as possible. Your efforts will also show your boss how proactive you are and how seriously you are committed to being successful in your role. Be sure to take notes on specific ideas and feedback that you receive, especially for areas of improvement.

- How are you doing compared to the goals that you and your manager established earlier in the week?
- What other key actions can your boss think of that you have not already accomplished?
- If it was not covered during the interviewing process, are there any informal evaluation points that are standard practice (e.g., a 30-day review)? When are the formal review points (e.g., Mid-Year and Annual Reviews)? Are there key competencies that you are evaluated against and what is the best way to learn about them? (This could also be covered at a slightly earlier or later point, depending on what makes sense for your situation.)

## The first month

As you near the completion of your first month, here are a few more things to keep in focus:

- Know the organizational structure and strategy
- Discover the needs of your function
- Know your manager, peers, and subordinates. Volunteer for business related extracurricular activities. Join the department for social events or business associates for lunch

- Evaluate the personalities of those with whom you work. Discover how they work together and what makes them a successful team
- Study other successful individuals – what do they do right? Identify what makes them successful and how you can do the same
- Learn the various modes of communication within the organization. For instance, does everyone communicate via memos, e-mails, or verbally?
- If it has not been discussed already, what form of communication does your manager prefer?
- Make your best attempt to understand strategic initiatives and vision well in terms of capabilities, finance, budgeting, existing strategies and priorities
- Know the vision, mission, and values of the firm or department/function/service line. Discover how much these concepts are followed
- Be sure to stay in contact with key individuals within your network that you communicated with prior to starting your new position – let them know how things are going and ask them if there is anything you can do for them

Many of the action steps you have taken thus far will be activities you should continue over the next two months. Be sure to revisit the questions and steps above, as many of them will take time to complete.

### The first year

- Draw on your past experiences, look at your successes to help plan for your future
- Discover obstacles in your way and come up with an action plan to overcome and tackle those obstacles
- With the help of your manager, create a personal development process. What types of training or additional education might you need to be more productive?
- Always be prepared for changes within the industry and train yourself for your next position
- Create and maintain a development journal. List areas for self-improvement, evaluate accomplishments and develop networking contacts. Ask yourself how you might address any areas for development
- Continually assess your strengths and weaknesses within the position
- Apply active listening skills and questioning techniques to observe and gather information from subordinates and colleagues
- Develop relationships with other supervisors or executives besides your direct boss or manager
- Achieve results that are important to your company and ensure that the accomplishments are known to key decision makers
- Continually work on improving critical skills such as: communication, leadership, teaming taking initiative, networking, etc.
- Remain disciplined in your work habits by setting goals and consistently achieving or revising them to fit your situation

Manage your time as well as you can. If you do not seem to accomplish what you believe you should seek development in these areas.

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# Appendix A:

## Articles on managing emotions, what to tell family and friends

### Emotional stages of a job transition

#### Initial stage emotions

Job loss can come as a shock resulting in a feeling of disbelief and/or denial. Anxiety, depression, sadness, confusion and isolation may occur especially right after a lay-off. Oftentimes, these emotions are not only felt by the affected individual, but they are also felt by the individual's family and friends.

#### Mid-stage emotions

Mid-stage emotions typically include anger, resentment and blame. Displacing these emotions onto others is very common.

#### Final stage emotions

Eventually a feeling of acceptance occurs, allowing for constructive progress to take place. At this stage, the previously negative emotions are transformed into positive energy and momentum begins to build.

### Proactive emotion management

- Take control – establish a routine that creates balance between personal and career-related activities; exercise for your health and mental well-being.
- Establish a plan – create goals and deadlines; prioritize your goals; this creates a sense of accomplishment and control which combats negative emotions.
- Strengthen your support system – focus on current relationships and building new ones; these resources will bolster your emotional warehouse.
- Build your knowledge – seek outside information to learn how to best handle the emotional ups and downs of a transition.
- Manage the process – proactively managing your career transition process yields an overall sense of control and well-being.



## Resource articles for managing emotions during a transition

### Keeping the family calm after a job loss

Learn tips for managing daily routines, domestic duties, financial worries, emotions, children's concerns and more.

### Learn how to manage job search stress

Job loss can evoke a range of emotions from anger to shame. Learn strategies for managing emotions during a career transition.

### Managing anger during a job search

Were you laid-off or fired? At some point, you will probably be told to "get past your anger" before interviewing for a new position. Learn strategies for doing so.

### How to support a partner who's just been laid off

Will your relationship survive the stresses of unemployment? A partner can play a critical role in a job search. Learn ways partners can help during the process.

### Finding family support after losing your job

Learn about ways your family can support you during a job transition.

### Picking up the pieces after the ax falls

Gain access to financial advice for those who have lost their jobs.

## Telling family and friends that you have been laid off

Telling people close to you that you have been laid off can be very hard. You may worry that your spouse or partner will become emotional or angry, or blame you for events you could not control. You may worry that the layoff will be put a strain on your marriage or relationship or your family life. You may wonder what to say to your children, to other relatives, and to friends. It's important to talk openly and honestly with the people close to you about losing your job and to share what you are feeling and going through. Most people will be very understanding and will want to offer support, especially those who are closest to you.

### Telling your spouse or partner

When you learn that you have lost your job, the first person you may want to tell is your spouse or partner. You may decide to pick up the phone right away and share everything that you know and are feeling. Some people wait to share the news until they get home. However, you choose to share the news, it's best to tell your spouse or partner that you have been laid off as soon as you can.

- Make sure your spouse or partner hears the news from you. Doing this is a way of showing your spouse or partner how important your relationship is to you and that you need and value his or her support.
- Take a deep breath. If you feel worried about the conversation, go for a walk or sit quietly for a few minutes and plan what you'll say before you go home.
- Be direct. Share the company's decision as a statement of fact. You might say, "I received some bad news at work today. The company announced layoffs and my job was eliminated. The layoff is effective....I have all the information for us to review together."

- Share as much information as you have. Your spouse or partner may ask questions like these:
  - Why were you laid off?
  - Is there any chance that you'll be rehired if conditions change?
  - How much severance or other compensation will you receive?
  - How will you receive the money? Will you get a lump-sum payment, or get the money over a period of weeks, and if so, how many?
  - How long will your medical coverage continue?
  - How will this affect any life insurance or pension funds?
  - Will you receive any support in finding a new job?

You may have received answers to some or all of these questions in a letter you got from your manager or human resources department when you found out you were losing your job. Showing your spouse or partner the letter will help the two of you work together to deal successfully with all the uncertainties that you face.

- **Be truthful.** Don't suggest there's a chance that the company will hire you back if you know this won't happen. You both need accurate information to make plans for the future.
- **Remember how you felt when you heard the news.** If you were angry or numb when you found that you had lost your job, your spouse or partner may feel the same way. Be understanding if he or she has similar feelings and needs some support too.
- **Have the conversation with your spouse or partner in a private place where your children cannot hear.** This will allow the two of you to talk about and agree on what to say to the children about the layoff. Learning that a parent has lost a job can be unsettling for a child of any age. Getting a clear and consistent explanation from the two of you will help your children adjust to the news.

## Telling your child and helping your child adjust to the news

The ages of your children will play a role in how much you tell them about your job loss and how they respond to it. Toddlers and preschoolers may not even understand what it means to have a job. All they may understand is that "Daddy goes to his office," or "Mommy can't play with me when she's working." So they may be very happy when a parent loses a job, because they may believe this means they will spend more time with you.

School-age children understand the link between jobs and money. A parent's job loss may affect them much more. They may be afraid that the job loss will mean they won't be able to enjoy their favorite activities, get birthday presents, or have enough to eat. If they have friends whose parents have lost jobs, they may assume that they'll have similar experiences – for example, if a friend had to move to another city, they may think they'll have to move, too. Teenagers may worry that you'll want them to get a job or that the layoff will mean they won't be able to go to college.

No matter what their ages, children tend to worry more about their parents' emotions than about money. They need their parents to provide a safe and secure world for them. If they sense that you are very upset, they may become upset, too.

The way to keep your children from worrying isn't to keep the news of your job loss from them or to pretend that everything will be exactly the same. If you act as though nothing will change, your child may feel betrayed if this turns out not to be true. Your child will feel confident and secure if you are truthful and if you prepare him or her for any expected changes.

Here are some guidelines when you talk with your child about job loss:

- If you are in a two-parent family, have the conversation together with your spouse or partner and children.

- Be honest about the situation. If you try to hide the truth, your child may worry that things are worse than they are or wonder what else you are hiding. Explain what happened without overwhelming your child with too many details.
- Try not to become too emotional when you talk with your child about the job loss. Try to stay in control of your emotions so that your child doesn't become overly worried or frightened by the news.
- A preschool child doesn't need a lot of information. You might say to a child who is 4 or 5 years old, "Daddy lost his job. He won't be going to his job anymore. He's going to be looking for a new job, and when he finds one, he will go to a new place to work."
- A school-age child can handle more information. To a child who is 8 or 9, you might say, "Mommy isn't going to her job anymore." Unfortunately, the company cut back on the number of people who work there, and they cut mommy's job. But don't worry. She's going to look for another job, and she'll find something she likes even better. You'll keep going to your school and doing the things you usually do, like playing with Justin and Maria."
- A preteen or teenager needs even more information. You might tell a teenager, "I lost my job today. I feel sad because I liked the company and my work. I'm going to look for a new job. Until I find one, you can expect things to stay pretty much the same. If we find we need to cut back on our spending for a while, we will all pitch in and get through it together. So don't worry."
- Help your child find ways to explain to friends what happened. Older children worry a lot about what their friends think and what to say to them about a parent's job loss. They may feel embarrassed about what happened and, if they don't know how to explain it, may even pretend to friends that a parent didn't get laid off. ("My father is home on vacation.") Talk with your child about what to say to friends who ask why you are suddenly home during the afternoon. Your child might say, "My dad's company laid-off a lot of people and he lost his job. He's looking for a new job."
- Avoid making promises you may not be able to keep. It may take longer than you expect to find a job. If your child asks in the fall if he'll be able to go to camp next summer, don't promise him that he can go if there's a chance that you may not be able to afford it. It's better to say, "We'll try our best to send you to camp next summer. But let's wait to decide until we see how quickly I find a new job."
- Be realistic. Don't take trips or buy your child gifts that you can't afford, hoping that these will make life easier. Actions like these may send the message that the way to deal with a crisis is to spend money you don't have. Instead, show your children more helpful ways of coping with unexpected change. Look for inexpensive ways to have fun such as borrowing videos from the library or going to free activities in the park together as a family.
- Encourage your child to help out at home. Knowing they are helping out in tough times makes children feel good about themselves.
- Don't burden your child with adult worries. As you encourage your child to help out, make sure you don't involve your child in adult worries or talk about these in a place where your child can overhear you. Say that you're watching your money carefully, not that you're worried about the electric bill. Children who hear too many details about family problems may think that they caused them or have to solve them.
- Stick to your usual routines as much as possible. Children like and need predictable routines – eating meals at certain times, having a story at bedtime, going to a family reunion like you always do. Familiar activities like these can be a great comfort to children who are going through a confusing time, so it's important to preserve as many as you can. It's better to give up an expensive annual vacation than to end the music lessons that your child loves.
- Be a positive role model. Show your children that it's possible to get through tough times with love, a positive attitude and a sense of humor.

## Telling relatives and friends

Figuring out what to tell other relatives and friends can be hard. You and your spouse or partner may have different ideas on how much information you want to reveal. And your relatives and friends may ask more questions than you feel comfortable answering.

To avoid problems, work out an agreement together about what you'll tell friends and family, and stick to your plan. Remember that you don't owe anyone an explanation for why you left your job or what financial arrangements this involved. But if you anticipate needing to ask your parents or in-laws for help later, it may be best to tell them the truth up front.

If you feel comfortable telling friends and relatives that you were laid off, you might say, “My company eliminated many jobs last month, and mine was one of them. It’s too bad, because I really liked my work. But I have several good leads for new jobs, and I’m hoping to be able to find work in the same field soon.” If friends or relatives know people in your field, don’t be shy about letting them know you would appreciate any leads they might have.

If you don’t feel comfortable saying you were laid off, you might say, “I left my company, and I’m looking for a new job in the same line of work. I hope to find one soon.”

No matter what you decide to say, focus on how you’re moving forward. Talk about the kinds of opportunities that you’re interested in exploring, so that your friends and family can pass along any information that might be helpful. Keeping in mind that layoffs have become very common and people may respond much more sympathetically than you imagined they would. Good friends and loving family members will want to help.

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### Ways to be in your desired career right now

<b>Read</b>	Journals, books, newsletters in your chosen field
<b>Meet People</b>	Who do the kinds of work you would like to be doing?
<b>Practice the Skills</b>	Of this field of work; find ways to improve the skills you will need to be effective
<b>Attend Conferences</b>	Of people who belong to this profession and become members yourself
<b>Volunteer</b>	Your services; participate in this kind of work in whatever ways you can; two or more hours per week
<b>Write</b>	Articles, newsletter pieces, or other items and submit them for publication
<b>Acquire Training</b>	In this profession through conferences, institutes or other professional development
<b>Visit Work Sites</b>	Where people are involved in this field; observe the work environment and ask questions
<b>Do Research</b>	About this field, either on your own or in cooperation with someone who shares your particular interests
<b>Be a Customer or Client</b>	In this field so that you can experience the services offered or sample the products
<b>Form a Support Group</b>	Of people who have similar interests in this career; include some who are employed the field and others who are not yet but will be one day

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# Appendix B: Action verbs

The following list will assist you in selecting appropriate action verbs that best describe the activities involved in your job. Some verbs may apply to more than one category, but are listed only once for brevity.

Plan	(to develop)
analyze	to separate into elements and critically examine
anticipate	to foresee and deal with in advance; to forecast
compose	to put or set down in writing
correlate	to establish a reciprocal relationship
create	to bring into existence; to produce through imaginative skill
define	to determine or identify the essential qualities or meanings of
design	to conceive, create, and execute according to plan
develop	to disclose, discover, perfect, or unfold a plan or idea
devise	to invent, to form new combinations or applications of ideas or principles
estimate	to forecast future requirements
evaluate	to determine or fix the value of
examine	to inspect closely
forecast	to calculate or predict a future condition
formulate	to develop
identify	to establish the identity of; to associate with some interest
organize	to arrange by systematic planning
plan	to devise or project the realization or achievement of a course of action
predict	to declare in advance; to foretell
research	to inquire specifically, using involved and critical investigations

<b>Direct</b>	<b>(to manage)</b>
administer	to manage or direct the execution of affairs
approve	to exercise final authority; to accept as satisfactory
authorize	to approve; to empower through vested authority
conduct	to carry on; to direct the execution of
confirm	to give approval to; to assure the validity of
control	to measure/interpret/evaluate actions to conform with plans/desired results
decide	to arrive at a solution; to bring to a definitive end
delegate	to commission another to perform tasks or duties
determine	to resolve; to fix conclusively or authoritatively
direct	to guide work operations through establishment of objectives, policies, etc.
guide	to direct or influence in a way or course
initiate	to start; to introduce; to originate
instruct	to teach
issue	to put forth or distribute officially
lead	to guide or channel others on a course or direction
manage	to handle, control; to succeed in accomplishing; to alter by manipulation
oversee	to watch; to supervise or superintend
schedule	to plan a timetable
supervise	to personally oversee, direct, inspect, or guide work of others
train	to teach, demonstrate, or guide others
transact	to carry out; to execute

<b>Service</b>	<b>(to supply goods/services)</b>
deliver	to convey; to send to an intended destination
disseminate	to spread or disperse information or ideas
distribute	to deliver to proper destination
expedite	to accelerate the process or progress of
forward	to send; to dispatch; to convey
inform	to make known
notify	to make known
provide	to supply what is needed
refer	to send or direct information or decision; to direct attention
report	to give an account of; to furnish information or data

<b>Service</b>	<b>(to supply goods/services)</b>
send	to forward; to dispatch; to convey
service	to perform services for; to repair or provide maintenance for
submit	to yield or present for the discretion or judgment of others
supply	to provide what is needed

<b>Advise</b>	<b>(to counsel or recommend)</b>
advise	to counsel or recommend; to give advice
appraise	to give an expert judgment of worth or merit
apprise	to inform; to make aware
confer	to compare views; to consult
consult	to give professional advise or services; to seek advice of others
contribute	to supply or furnish a part; to cooperate
counsel	to give advice
interpret	to give the meaning of; to explain to others
promote	to cultivate; to advance to a higher level; to elevate
recommend	to advise or counsel a course of action; to offer or suggest for adoption

<b>Interface</b>	<b>(to interact with others)</b>
answer	to speak or write in reply
arbitrate	to settle differences between two parties in controversy
assist	to help or aid others in the performance of work
communicate	to transmit verbal or written information
contact	to communicate with
cooperate	to work together in unison; to take part; to act jointly or in concert
coordinate	to regulate, adjust, or combine the actions of others to attain harmony
correspond	to communicate with
discuss	to exchange views for the purpose of arriving at a conclusion
enlist	to engage or secure the support and aid of others
interact	to act upon one another
interface	to interact or coordinate harmoniously
interview	to obtain facts or opinions through inquiry or examination
market	to sell; to expose for sale
mediate	to interpose with parties and reconcile differences
negotiate	to confer with others with a view of reaching agreement

<b>Interface</b>	<b>(to interact with others)</b>
participate	to take part in
persuade	to move by argument or entreaty to a belief, position, or course of action
respond	to give an answer
visit	to call upon

<b>Execute</b>	<b>(to do personally)</b>
allocate	to distribute; to apportion
arrange	to put in proper order; to prepare for an event
assemble	to collect or gather together in a predetermined order from various sources
audit	to examine officially with intent to verify
balance	to compute the difference between debits and credits
calculate	to make a mathematical calculation
check	to verify; to compare with a source
code	to put into words or symbols used to represent words
collect	to gather
compare	to examine for the purpose of discovering resemblances or differences
compile	to put together information; to collect from other documents
compute	to determine or calculate mathematically
consolidate	to bring together
correct	to make or set right; to alter or adjust to conform to a standard
draft	to prepare papers or documents in preliminary form
ensure	to make sure, certain, or safe; to guarantee
establish	to bring into existence
execute	to perform; to carry out
extract	to separate; to determine by calculation
facilitate	to make easier
file	to arrange in a methodical manner
finalize	to put in finished form
follow up	to pursue closely in order to check progress
furnish	to provide with what is needed; to supply
gather	to collect; to accumulate and place in order
generate	to bring into existence; to produce
implement	to carry out; to execute a plan or program
input	to enter into a database
inspect	to examine or determine; to critically examine for suitability
install	to place, establish, or set up



Execute	(to do personally)
investigate	to observe or study by close examination and systematic inquiry
maintain	to keep in an existing state
monitor	to watch, observe or check for a specific purpose
obtain	to acquire or gain possession of
operate	to perform an activity or series of activities
perform	to fulfill or carry out some purpose
place	to locate and choose positions for
post	to transfer or carry from a book of original entry to a ledger
prepare	to make ready for a particular purpose
present	to introduce; to offer for view
process	to handle in accordance with prescribed procedure
produce	to make or yield something
proofread	to read and mark corrections
propose	to form or declare a plan or intention
receive	to acquire; to come into possession of
reconcile	to adjust; to restore to harmony; to make an agreement
record	to register
remit	to send money in payment of
represent	to act in the place of or for
retrieve	to regain
review	to consider; to reexamine
revise	to rework; to correct or improve; to make an up-to-date version
secure	to gain possession of; to guarantee; to make safe
sell	to offer property/services for money or other valuable consideration
set up	to establish; to institute
sort	to arrange; to classify
survey	to examine as to condition, situation, or value
tabulate	to put into table form; to set up in columns, rows
transcribe	to transfer data from one form to another without changing nature of data
type	to typewrite
update	to bring current
verify	to confirm; to compare with a source
write	to set down letters or figures on paper; to author; to draft

Conduct	(to administer)
assign	to specify or designate tasks or duties to be performed by others
discipline	to take corrective action against contrary individuals/groups
handle	to manage; to take hold of; to deal with

# Appendix C: Sample resume bullet points

In this appendix, you will find sample bullet points that describe common responsibilities and accomplishments of our people in the various functions at Deloitte. There are separate sections for Audit, ERS, FAS, Consulting, Tax, Clients & Markets, Human Resources, Administrative Assistants and Finance. This is by no means a complete list.

**They are not necessarily to be used verbatim.** There may be some alternate language included in the bullet. They should serve as a reminder of some of the experiences and results you might have had while at the firm. We encourage you to create your own bullet points to fit your style and experience.

Most of all we request that you not include anything on your resume that you cannot fully support verbally in an interview. Remember, it is the phone screen and interview that decide your next career move, not your resume.

## General client-service sample bullet points

- Conduct interviews, surveys and research in order to determine client need and to provide the basis for analysis of potential solutions and/or alternative approaches
- Prepare and present potential solutions and alternative approaches while providing creative insight into options available to potentially meet the needs of the client
- Analyze research and client data to advise and recommend solutions, utilizing interviews, surveys and research to provide the basis for analysis of potential solutions and/or alternative approaches
- Manage client expectations by proactively advising on technical issues and communicating proposed solutions
- Draft proposals and identify engagement follow-on opportunities
- Participate in generating client proposals, as well as working with senior managers to create expense and resource management documentation
- Assist with project proposal documents aimed at summarizing intended work to be done for potential clients
- Oversee project budgeting, change orders, billing and prepare project invoices
- Identify streamlining opportunities and enhancement to the current workflow by assessing the current content production and delivery environment, considering People (i.e., roles and responsibilities), Process (i.e., activities, touch-points and transactions) and Technology (i.e., current platforms and applications)
- Implement well-defined, quick-fix and high-value process and technical solutions
- Work with senior level executives to provide results and monitor long-term success
- Sold and managed \$X million in new business
- Design presentations on trends in \_\_\_\_\_ (types) industries for partners to deliver to target companies and clients
- Facilitated daily project status meetings, and create meeting agendas and status reports, and coordinate deliverable deadlines for project team of \_\_\_\_ (number) people
- Identify business opportunities, develop proposals, build relationships with existing clients and other service areas for cross-selling purposes
- Manage timely completion of value-added projects for clients
- Monitor project quality via proprietary quality assurance methodology

- Manage client engagements overseeing a staff of \_\_\_ to \_\_\_ professionals (fill blank with range of numbers)
- Supervise and prepare evaluations (semiannual and annual) for staff
- Supervise staff and perform review procedures and general oversight on all engagements
- Gained a working understanding of client's major business processes
- Conduct interactive interviews of client personnel
- Issue objectives prior to commencement of engagement
- Monitor subordinate's progress and performance, and review work by using the "review by interview method"
- Issue engagement letters and scope memos
- Attend opening meetings with client management outlining scope of project
- Perform interviews of client personnel and author narratives of their operations
- Assist in the development of the audit program taking into account previous audits performed, continuing risk assessments, and research
- Select a relevant sample based on electronic data processing reports and perform field testing (financial and operational)
- Issue internal audit questionnaires detailing findings from field testing
- Train and supervise work of staff and conduct performance evaluations in a timely manner
- Cross-sold other product lines, presented multiple solutions to clients, wrote competitive proposals, penetrated new clients, and sold add-on engagements
- Demonstrate strong knowledge of client's industry or functional specialty
- Participate in proposal development efforts resulting in X amount of revenue brought into the firm
- Play substantive role in retention of firm professionals and recruiting at the campus and experienced-hire levels
- Effectively communicate with top management of large corporations
- Review work performed by junior staff and provide constructive feedback
- Engage in high-level, sensitive problem-solving for departmental management
- Staff and supervise projects, oversee work product, and manage client billings
- Coordinate qualitative aspects of project management, interviews, research, information gathering and preparation of technical memorandums
- Determine engagement proposal fees and overall maintenance of existing client charge codes, including billing client engagements
- Identify cost-savings opportunities

### **Audit sample bullet point**

- Assist in the development and delivery of risk-based internal audit plans, including operational, financial, and IT audits
- Assist in planning and delivering IT audit services in various environments, under AICPA and IIA guidelines, within several different computer platforms and architectures
- Perform business process reviews to identify areas of potential revenue loss, inefficiencies, or increased business risk
- Conduct specialized compliance reviews
- Perform research on outstanding issues and assist in project documentation for the procurement team
- Plan, prepare, and review audit fieldwork
- Identify issues, conduct research of authoritative literature, prepare and issue financial statements
- Design and implement a manual revenue collection system
- Design and implement manual supplies and expenses tracking systems

- Prepare year-end and monthly financial and operational reports
- Perform and review Monthly Close procedures
- Develop Cost Structures included in new business proposals
- Perform the role of controller and financial analyst for a client
- Prepare financial models and other required documentation for use in VC meetings
- Prepare capital asset budgets and capital lease ROI scenarios, needed to support growth of client revenue
- Completed engagement fieldwork successfully by performing a high-level substantive review of a client's audited financial statements and tax returns for the period
- Assist the client in the preparation of their required Securities and Exchange Commission (SEC) filings
- Analyze and document client's current internal control risk
- Perform research on complex accounting and reporting issues
- Attend the firm's audit, computer software and supervisory training seminars
- Developed risk-based audit approach for specialized audit programs
- Perform audit testing and documentation during audits of \_\_\_\_ and \_\_\_\_ clients (fill blanks with industries)
- Perform preliminary analysis and review of client annual reports
- Perform IT internal control audits on consulting engagements
- Perform procedures and prepare consents and management representation letters for all related SEC filings
- Perform year-end audits and semi-annual reviews
- Perform agreed upon procedures for mergers and other restructuring
- Develop and modify procedures and audit programs throughout the engagement based on identified risks and GAAS and Firm requirements
- Continually update engagement Managers and Partners of concerns arising during performance of audits and other client services
- Adjust procedures to address guidance and additional concerns raised by Managers and Partners
- Conduct interactive interviews of client personnel at all levels
- Document, monitor, and prepare audit and review work using firm-created audit software
- Determine and address deficiencies in final electronic and manual work papers regarding adherence to Firm and Industry guidelines
- Assign, monitor, and review work of staff and lower-level senior auditors
- Set and monitor compliance with budgeted work hours and staffing levels
- Instruct new assistants on inherent risks and audit approach related to \_\_\_\_ (industry or part of an industry)
- Teach assistants and new seniors on how to perform audits and other client services related to (industry or part of an industry)
- Document and discuss with client and firm management issues and recommendations identified during audit and review work and monitor those issues through ultimate disposition
- Address best practices and efficiencies for engagement based on continued experience from changing environment related to mutual funds
- Perform year-end and quarterly and interim reviews in an "In Charge" capacity
- Document and monitor audit and review work using firm created audit software
- Perform technical research of audit theory using various technological mediums
- Determine approach to engagement to make effective use of team members' skills while staying within previously developed budget
- Monitor compliance with prescribed budget by identifying and explaining variances to plan

- Prepare and discuss performance in completion of pre-identified objectives, as well as outlining areas for future development
- Work with key company personnel and management to identify control and efficiency issues and business risks
- Plan and organize audit engagements to achieve maximum efficiency and risk coverage
- Analyze business risks and devise proper testing approach to ensure minimal risk exposure to the company
- Analyze audit findings and communicate recommended course of action to key company personnel
- Ensure client compliance with GAAP and other accounting standards
- Devise audit test to detect material variations in financial statements
- Prepare and review client financial statement disclosures
- Review and assess the validity and clarity of client 10-K filings and other SEC disclosures
- Assisted clients in preparing for initial public stock offerings
- Test for the following sections on audits: investments, dividend income, liabilities, fixed assets and receivables
- Prepare consolidated financial statements, financial reports and reconciliations
- Perform and supervise audit engagements for multinational companies by surveying activities that involve: examination, investigation and review of records, reports and managerial practices to ensure compliance with statutes and internal regulations
- Facilitate communication of audit results to company's management, audit committees and Board of Directors

## Enterprise risk services sample bullet points

### Assurance and compliance

- Conduct IT audits, security and continuity implementation in medium-to-large-frame computer environments
- Performed application and information system audits for various clients, and provided recommendations based on adherence to management policies, industry best practices, and operational procedures
- Identify and test clients' internal control policies and procedures during pre and post implementation
- Provide monitoring and independent assessment
- Participate in development of methodology in the following focused areas: Security Assessment and Implementation, Security Management, Technical Security, and Facility Requirements
- Developed audit software programs using (insert name of software)

### Capital markets

- Play substantive role in client relationship and communication
- Play lead role in attaining quality internal and external communication/ deliverables, including technical content of reports, proposals, etc.
- Provide engagement and select appropriate methodologies in the following focused areas: risk measurement and management, portfolio valuation and risk analysis, operation and internal controls, treasury management, transaction design and structuring, FAS 133 Implementation services and asset securitization

### Data quality

- Demonstrate strong knowledge of industry or functional specialty as it pertains to data quality and integrity
- Provide task management and select appropriate methodologies in one or more of the following areas: system implementation, continuous monitoring, data and statistical analysis for risk management, inventory service, and health care services
- Evaluate, counsel, mentor, and provide feedback on performance of others
- Manage individuals on the engagement team

- Coordinate advisee training and development program

### **Internal audit services**

- Extensive experience in internal control, risk assessment, and operational auditing
- Conduct internal and external audits within the following industries: banking, brokerage, investment banking, and insurance
- Manage the internal audit process, including risk assessment, testing/evaluation of records and designing/conducting the internal audit process
- Managed outsourced internal audit engagements of Accounts Payable, Purchasing, Inventory, Human Resources and Third-Party Contractors Managed business process reviews of the purchase to payment business cycle to detect weakness and implement best practices and efficient processes
- Worked with client Internal Audit Departments and Audit Committees for risk assessment

### **Regulatory consulting**

- Managed interactions with the SEC
- Play integral/lead role in client relationships, as well as engagement planning, executive and management
- Conducted reviews of technical systems/environments (operating systems, databases, access control software, telecommunications, systems development, and operations)
- Provide engagement or task management and select appropriate methodologies in one or more of the following focused areas as they pertain to Regulatory and SEC Compliance Issues: Investment Management, Banking, Securities and Insurance

### **Secure eBusiness**

#### **Information security services**

- Utilized internet technologies, such as, Public Key Infrastructure (PKI), Directory services, Security architecture, Encryption, and E-Business/e-Commerce security
- Develop security baseline strategies and security methodologies
- Provide managerial and technical guidance and manage all aspects of information protection
- Led architecture projects in complex networked environments
- Develop security policies and procedures
- Perform risk and security assessments, as well as tool evaluation
- Design and implement information protection architecture and security or cryptographic solutions
- Assisted in an Attack and Penetration study of a client's network to evaluate the effectiveness of their web security
- Performed web assessments for various clients, assessing the validity, functionality, and ease of use of their respective websites.

#### **Package integrity services**

- Managed projects in controls re-engineering, applications security implementation, distributed system recovery, distributed systems administration, database administration in security auditing techniques and/or computer control environments

## Systems project assurance services

- High-level background in accounting and/or IT control assessment and implementation in medium to large mainframe computer environments
- Actively participated in engagements related to project risk management, software testing and validation, business process controls and change management

## FAS sample bullet points

### Mergers and acquisitions/Corporate finance

- Evaluate financing methods, such as a European multicurrency cross-border cash pooling system
- Conduct due diligence and financial analysis (including synergy models/scenarios) for clients involved in M&A activities
- Assist in data collection and target evaluation
- Review accounts receivable and inventory risk
- Analyze board declarations, change of control provisions, and commitments and contingencies
- Assist deal team leaders in conducting preliminary target collecting
- Identify, evaluate, execute and maximize the return on transactions
- Advise middle-market clients on mergers and acquisitions, sales and divestitures, private placements of debt and equity and financial restructurings
- Conduct industry analyses and company valuations using financial statements, industry performance, financial modeling and economic indicators
- Author industry studies and multiple buy-side analyses
- Create sell-side and capital-raising templates for client presentations to investors
- Co-author private placement and confidential information memoranda
- Conduct market and demand assessments
- Conduct assessment of consumption patterns, demographic characteristics and distribution methodologies
- Assist in development of company-specific strategies to increase shareholder value
- Present opportunities to potential investors
- Perform statistical and data analysis, data mining and valuation of debt service and bond issues
- Supervise staff and associates in preparing, sampling and analyzing financial records
- Discuss issues and case strategies with legal counsel
- Respond to information requests from client representatives, legal counsel and opposing experts
- Prepare damage analysis calculations in lost profits engagements
- Identify, evaluate, execute and maximize the return on transactions
- Introduce companies to investment bankers, financial institutions and venture capitalists
- Bridge information gap between buyers and sellers and identify negotiation points to reduce purchase price
- Help strategic and financial buyers assess synergy validation, quality of earnings and future cash flows
- Participate in transaction strategy discussions
- Provide corporate structuring alternatives to clients
- Managed various phases of transaction process, such as drafting an offering memorandum, participating in auctions and contemplating a bid
- Assist in structuring purchase agreements and letters of intent by incorporating deal points to benefit clients
- Assess operational and technological risks in transactions and assist in post merger realignment



- Manage transaction due diligence, carve-out and post-merger integration of various corporate functions
- Participated in presentations to offer M&A services and develop new business, both internally and externally
- Provided financial and operational due diligence for strategic and financial buyers
- Identify and introduce appropriate capital sources
- Create marketing materials and managed VC correspondence
- Advise client on capital structure, entity valuation, and negotiation of terms
- Identify potential strategic buyers
- Research comparable transactions
- Develop valuation support for negotiations
- Perform due diligence and cash flow analysis
- Consult with debtor and creditor relative to valuation and potential exit strategies
- Developed financial models to track and analyze public company financials
- Analyzed valuation data
- Proofread and edit analyst schedules
- Perform financial research of current clients and of Fortune 500 Companies for potential new merger or divestiture business
- Create financial schedules for due diligence reports
- Conduct extensive due diligence, including documentation review, market research, and management and customer interviews
- Develop complex financial models and perform valuation, IRR and accretion/dilution analyses
- Develop and assess strategic business plans and financial models for client companies
- Evaluate financing alternatives to reduce the cost of capital
- Develop corporate finance strategic options
- Assist in the negotiation and structuring of purchase agreements
- Participate in the evaluation and identification of potential acquisition candidates
- Create best practices business proposal and strategic options template
- Create business development marketing initiatives designed to identify corporate finance advisory clients
- Develop new business and execute private placements for middle market companies
- Prepare offering memoranda, estimates of value, and lead negotiations with potential strategic and financial investors
- Develop DCF and/or comparable company analysis

## **Dispute/valuation**

- Calculate potential damage estimates
- Create complex financial models using a variety of forecasts and assumptions
- Conduct extensive data management analysis and quality assurance for the preparation of expert testimony and congressional submission
- Prepare fraudulent conveyance analysis
- Quantify economic damages
- Search for hidden assets
- Perform purchase price adjustments
- Analyze, compile, and present client information, in summary form, for attorney litigation support
- Prepare and present company valuation reports

- Compile and prepare corporate, partnership, individual and trust returns
- Determined fiscal/economic impact
- Perform business loss analysis
- Perform lost earnings analysis
- Perform restricted stock valuation
- Analyzed financial data with statistical and quantitative methods
- Complete comprehensive valuation studies for litigation, restructuring, purchase price allocation, ESOP, foreign interest allocations, blockage discounts, and estate and gift taxes purposes
- Perform extensive economic, industry and comparable company research
- Perform financial and ratio analysis, financial modeling, forecasting, projection and discounting of cash flows
- Perform determination of discount and capitalization rates and report writing
- Conduct multiple range of value studies using discounted cash flow approach, comparable company approach, and cost approach in a variety of industries
- Determine value of executive non-competition agreements
- Develop financial models
- Perform valuation of intangible asset valuations and purchase price allocations
- Perform discounted cash flow, comparable company, and company transactions analysis
- Perform property valuation utilizing income, market and cost approaches on various commercial and residential properties for real estate appraisals and valuation studies
- Developed economic model to estimate the equity value of a \_\_\_\_\_ (type) company to help management implement an Employee Stock Option Plan
- Value customer lists and Non-Compete agreements for SEC compliance purposes
- Value minority interest shares in privately held companies
- Estimate value of retail franchise, switching from C-corporation to S-corporation, for IRS compliance purposes
- Utilized various financial modeling and valuation methods, including discounted cash flow analyses, capital asset pricing theory, internal rate of return, market comparables and derivative security analyses

## Consulting sample bullet points

### Strategy and operations

- Assist clients in re-engineering their business processes in order to improve efficiency and increase revenue
- Perform financial analysis and create reports on client performance to provide feedback and recommendations for improvement
- Model and evaluate workflow process within Operations Support Systems (OSS)
- Author and present eRetail Fulfillment Best Practices report at training sessions attended by partners and consultants
- Serve as project manager for a document management implementation
- Create test plans, cases, and scripts for various projects
- Lead teams in business process strategy and design
- Develop a market-entry strategy for personal finance venture with \$\_\_\_\_\_ in potential revenue
- Perform business process reviews to identify areas of potential revenue loss, inefficiencies, or increased business risk
- Conduct specialized compliance reviews
- Perform research on outstanding issues and assist in project documentation for the procurement team

- Play key role in the design of a large computer-based microfilm storage and retrieval system
- Develop production flow models and perform cost-benefit analyses
- Design billing requirements matrix to support billing multiple payors
- Perform market analysis of client's competitive environment and formulate a business plan
- Analyze and recommend various tactical approaches to capturing share for a client
- Develop a business unit strategy to improve sales force effectiveness for a \$\_\_\_\_\_ (revenues) per year global business unit of a nationwide \_\_\_\_\_ (type of company)
- Analyze and identify major negative contributors to poor revenue performance and recommend Customer Relationship Management improvement opportunities
- Lead process redesign in the \_\_\_\_\_ (type) department of a \$\_\_\_\_\_ (revenues) \_\_\_\_\_ (type of company) in order to eliminate intercompany imbalances of as much as \$\_\_\_\_\_ (result)
- Create a high-level summary for executives, as well as a training manual for users, following a Hyperion Enterprise installation at a \$\_\_\_\_\_ (revenues) \_\_\_\_\_ (type) company
- Assisted with the development of new commerce and content businesses via the Internet
- Co-lead a market study on telecommunications wireless service providers
- Performed a post-merger business process re-engineering and legacy systems assessment to help the client realize efficiencies by centralizing selected processes and leveraging newer technologies
- Developed a common set of value-chain and customer-focused processes across all business units to provide the ability to improve fill rates, asset utilization and customer service levels
- Compared client web site's ease of use, functionality, and interactivity against its leading competitors
- Developed financial business case to support the implementation of a business-to-business e-procurement systems for a Fortune 500 client
- Redesigned the small dollar purchasing processes for a major \_\_\_\_\_ (company)
- Quantified \$X million in savings achieved by a merger of two companies
- Redesigned the customer experience for the consumer lending business units for one of the nation's largest banks
- Developed sales process strategies for a large (industry) company
- Led modification of supply chain assessment initiative for a (company).
- Established channel costs baselines, change management approach and necessary metrics to track category management performance
- Directed the warehousing and distribution requirements for a \$\_\_\_\_ million division of a Fortune 50 (company)
- Led cost cutting initiative for a (company) that resulted in \$\_\_\_\_ million savings
- Built Excel-based activity-based costing model

## Human capital – Actuarial

- Define benefit and defined contribution plan valuations and compliance
- Develop and value pension plan designs (e.g., defined benefit, defined contribution, and cash balance plans) and special retirement programs reducing the clients' pension funding costs by \_\_%
- Recommend pension asset allocation structure and investment strategies
- Derive most cost-effective consolidated benefit plan for clients involved in a merger or an acquisition
- Manage multiple client teams that develop strategies for the funding, design, valuation, and administration of employee benefit plans
- Develop structure and actuarial/financial models for pension plan improvement initiatives
- Determine clients' pension plan funding and contribution levels and prepare actuarial valuation reports
- Design and price large union multi-employer pension plans

- Train and develop junior actuarial staff and students
- Conduct annual ERISA valuation, FASB reporting and non-discrimination testing of qualified pension plans requiring extensive knowledge of actuarial methods, FASB, and IRS code and regulations
- Design and price retirement and employee benefit programs, including defined benefit plans, defined contribution plans, health care programs, 401(k) plans, profit-sharing plans, early retirement windows and special executive compensation arrangements
- Design and program complex computer applications to handle the administration and actuarial valuation of employee benefit plans, including healthcare programs
- Perform reserve analysis
- Calculate auto, homeowners, general liability, workers compensation and hospital loss reserves
- Create models and visual basic macros to simplify and automate common tasks and projects
- Train others in actuarial methods, including fundamentals of pension plans, pricing and cost analysis and ERISA and Social Security regulations
- Assist in preparation of clients' employee data and perform pension plan valuations
- Project and analyze pension and welfare plans of Fortune 1000 Companies
- Evaluate FAS 7, ERISA, and FAS 35 results through various programs and spreadsheets
- Clean and prepare data received from clients using various programs
- Estimate benefits and contributions for clients and project future costs, earnings, and benefit obligations
- Perform actuarial valuations for defined benefit plans, including funding and FASB, as well as retiree medical valuations
- Perform benefit improvement studies and prepare pension-related filings for the IRS and the PBGC
- Provide consulting services to large corporate clients regarding retirement/ pension issues, including pension plan design, executive plans, funding and retiree medical valuations, benefit improvement studies and cost analysis, and IRS/PBGC filings
- Prepare data and annual valuations for both FASB and ERISA purposes
- Complete government forms, year-end disclosures under FASB, two FAS-106 post-retiree medical valuations, and design studies
- Complete special projects, including a plan termination, audit of another firm's valuation of a large government benefit program, audit of a global firm's proposed adoption of FASB accounting standards for all global benefits programs, and audit of a credit card rewards program
- Perform early retirement window cost studies and small valuations, including funding for non-ERISA plans and expense under IAS-19 and GASB
- Provide actuarial services for firm audit teams in merger and acquisition transactions
- Determine loss reserve analysis and profitability monitoring reinsurance
- Review actuarial studies of loss reserves for self-insured entities and captive insurance companies

## **Human capital – Employee benefits**

- Research and identify the best carriers for a variety of types of insurance products
- Provide wide range of employee benefit information services through analysis of clients' benefit plan documentation and enter information into computerized database
- Prepare benefit projections, illustrations, relative value comparisons and benefit surveys
- Manage consulting relationships with major multinational clients in areas of international employee benefit design, financing and administration
- Serve as International Benefits Practice Leader, charged with responsibility of developing new and innovative products and services
- Design and finance third-country national and expatriate benefit programs

- Analyze the impact of U.S. tax law and ERISA on international benefit planning
- Conduct worldwide benefit plan audits and financial reviews and surveys
- Design local country statutory and private benefit programs
- Foster international social security arrangements and totalization – total remuneration measurement and modeling to simplify complex benefit-related issues
- Partner with clients to evaluate qualified pension plan design, and recommend amendments to conform with DOL and ERISA, and assist with the implementation of changes
- Develop employee benefits communication materials and presentations
- Design and test HR-related IVR and web applications
- Define, document, and communicate detailed employee benefit plan policies
- Manage employee benefits outsourcing relationships
- Develop call center online procedures
- Define system interfaces and test plans associated with implementation of payroll systems and HR systems
- Serve as national resource for benefit administration projects
- Develop managed care and managed mental health RFPs
- Develop IVR benefits enrollment scripts and new benefit plan communication campaigns
- Work with plan design and communication consultants to implement flexible benefit plans for large employers
- Develop detailed system interface requirements and design enrollment forms and related materials
- Develop innovative marketing plans and materials to increase the number of clients for the firm's proprietary software product
- Provide quality assurance for software systems developed for administering clients' 401(k) and defined benefit pension plans
- Participate in the successful implementations of software systems for 401(k) and defined benefit clients
- Serve as the plan provision subject matter expert to a team of 100 associates for open enrollment
- Serve as Internet specialist for open enrollment to resolve basic technical issues for users
- Conduct refresher training for experienced associates in preparation for open enrollment
- Update employment status changes and make appropriate adjustments to health care accounts
- Revise and update on-line and intranet reference for associate use
- Consult and tailor benefits websites to Fortune 500 clients
- Establish and communicate project definition to client and Internet team
- Develop and present website prototype to clients to demonstrate task flow, site functionality, and facilitate discussion on customization
- Manage design department usability lab
- Communicate to internal usability candidates the benefits of usability testing
- Utilize user scenarios, observation, site walk-through, and survey techniques to determine evaluation of design criteria, such as ease of use, help functions, and format consistency
- Document, prioritize, and present testing feedback to creative design management
- Provide leadership to internal team to deliver websites within communicated timeframe
- Write employee benefit communication materials for clients and consult clients on plan design features
- Evaluate and select service providers and investments for defined contribution plans
- Conduct employee communication meetings for rollout of new plans for plan sponsors
- Perform tax reviews for audited qualified plans
- Perform benefit plan due diligence for companies involved in mergers and acquisitions

- Manage Form 5500 compliance practice of tax department
- Prepare submissions to the IRS under EPCRS program and to the DOL under the DFVC program
- Draft section 125 plan documents and wrap-around welfare benefit plan documents
- Perform research on various issues for presentation to partners and clients
- Consult with clients on defined contribution plan issues, including tax responsibilities, compliance issues and administrative procedures
- Train subordinates and clients to educate them in the concepts, design and administration of defined contribution plans
- Conducted valuation of \_\_\_\_ (number) plans, including plan allocations, trust reconciliation and nondiscrimination testing
- Develop client manuals and voice response scripts
- Administer, convert and implement 401(k), Profit Sharing and Money Purchase Plans
- Perform allocations, reconciliation and nondiscrimination testing for plans ranging in size from \_\_\_\_ to \_\_\_\_ lives

## Human capital – Compensation

- Analyze executive compensation (top five), including stock options plans, company-wide salary structures and the firm's competitiveness with the marketplace
- Conduct market pricing, salary surveys and variable and annual pay increases
- Determine salary grades for client positions by market pricing hourly, salaried, middle, and top management positions
- Produce salary survey results for \_\_\_\_ (number of) \_\_\_\_\_ (types of companies/industry) through data collection and statistical analysis of base and bonus pay for \_\_\_\_ (number of) exempt and non-exempt positions
- Prepare job descriptions to support client documentation
- Perform salary audits for financial, healthcare, manufacturing and non-profit organizations (or whatever industries you consulted with)
- Manage numerous compensation and human resources consulting assignments for major corporations
- Assess market competitiveness and develop compensation plans for corporations across a wide range of industries
- Develop pay bands and salary structures for organizations based on benchmark analyses
- Design long-term compensation plans for pre-IPO start-ups based on modeling firms' projected growth rates, staffing levels and business strategies
- Counsel Board of Directors and senior management on redesigning executive compensation programs for numerous Fortune 1000 organizations
- Design long-term incentive plans utilizing value trees and Economic Value Added (EVA) analyses to emphasize operating measures with the greatest impact on shareholder value creation
- Manage regional effort to sell web-based compensation consulting services to new and existing clients
- Create incentive plans for sales professionals designed to maximize sales channel performance, as well as to align corporate business strategy drivers with sales force core competencies
- Lead consulting projects for major global financial services firms in the area of executive compensation and incentive design
- Develop new marketing and consulting strategies to leverage traditional survey products to deliver value-added strategic pay design services to senior human resources and line management within client firms
- Design surveys, analyze job descriptions, supervise data collection processes, oversee data analysis phase, and partner with clients to ensure timely and accurate results
- Provide executive benefit and deferred compensation design services, offering clients total compensation solutions
- Develop and implement effective base and variable pay strategies

- Implement a new company-wide compensation program
- Renovate the client's compensation program and conduct in-house management training
- Prepare position descriptions and evaluate using market pricing method
- Develop and maintain job information database
- Evaluate and recommend individual pay actions and approve pay policy exceptions
- Participate in multiple salary surveys and analyze and interpret data results
- Forecast salary and merit increase budgets and guide the budget process
- Develop and update competitive salary structures
- Develop and administer KEIP plans for middle and executive management
- Develop and implement new salary administration guidelines
- Ensure compliance with federal and state wage and hour laws
- Counsel field HR management employees on company policies and procedures
- Value long-term incentive grants for public companies
- Assess competitiveness of executive pay programs through proxy and survey analyses
- Recommend share authorizations for companies based on share utilization and allocation analyses
- Design retention and severance programs for several \_\_\_\_\_ (industry) companies
- Review plan documents and employment agreements for senior management
- Advise companies on trends in executive and employee compensation

## Technology integration

- Perform technology assessments and controls (SAP, Unix, NT, and Internet) for major energy/public utility/communication companies (add your unique industries)
- Conduct field audit for major (type of company) and present recommendations to Board of Directors
- Redesign US distribution strategy for multinational (type of company) manufacturer
- Lead market research team investigating consumer purchase patterns and value expectations from the electronic buying experience
- Develop blueprint to improve the profitability of existing relationships and refocus channel strategies to address key retailing trends
- Identify, research and evaluate the attractiveness of several multimedia industries as strategic growth and/or convergence opportunities for a major (type of) company
- Support field consultants through provision of comprehensive market analysis of various industries including (type of industries)
- Determine project software and hardware needs
- Conduct needs analysis, system specification and eBusiness strategy for several clients
- Assist in the development of web prototype using Microsoft Front Page
- Develop a 36-month Technology Blueprint by aligning the company's future business needs and requirements with proposed technology initiatives to support these business needs
- Demonstrate the value of the investment of proposed technology initiatives in context of the company's business strategy, technology strategy and emerging technology trends
- Led development of a high-level Information Plan encompassing all of the client's business functions
- Manage vendor relationships with internet-related companies, such as \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_ (names of clients)
- Negotiated over \$\_\_\_\_\_ (revenues) worth of hardware and software contracts
- Complete systems development and customization

## Enterprise applications – SAP, JD Edwards, Siebel, Oracle, PeopleSoft, Lawson

- Responsible for the functional implementation of release 11.5.8 of the Oracle Projects Module and Oracle Cash Management for client's Europe operations, including a Shared Service Center setup.
- Project consultant for the implementation of SAP WM 4.6C in four plants in Puerto Rico for a world-class pharmaceutical corporation. Provided functional SAP WM support in receiving, put-away, picking, and shipping areas. Performed on-the-job training to help end users complete their tasks and troubleshoot issues. Assisted the client in performing physical inventory, troubleshooting issues, and issue resolution.
- Assessed disparate legacy systems at different business units, identified and compared key functionality with the functionality of typical ERP packages.
- Managed an SAP FI/CO implementation project through system test, training, data conversion, and go-live phases for a \_\_\_\_\_ (type) company.
- Interface analyst for a national nonprofit health corporation with 73 hospitals in 19 states. In a phased rollout, responsible for gathering GL and AP interface requirements for each hospital and creating functional and technical designs for Lawson and eGate development.
- Project Manager of a Lawson upgrade assessment project for a global energy solutions company. This assessment included evaluating the system impacts of moving to LSF 9 and version 9.0 of the Lawson applications. The assessment included the evaluation of extensive system modifications, as well as multiple external interfaces built with a variety of integration tools.
- Worked with the users to define their future state business requirements, setting up the application, providing support during user acceptance testing, and support during go-live, as well as providing post production support. This project included working with Oracle on Demand for the creation and maintenance of our development and test Oracle environments.
- Responsibilities included providing overall engagement direction to a team of approximately 15 consultant and client team members, managing project scope, and review of functional designs.
- Co-design a custom shipping module to allow for piece building and automated entry of tracking numbers, greatly increasing the capacity and accuracy of the shipping department
- Collaborate with business unit management, IT peers, and business unit/IT staff to develop, define, and implement process, business, and technical solutions.
- Establish and maintain clear communications with business sponsors and IT senior management in regard to status, issues, progress, and risks.
- Re-engineer the "Procure to Pay" processes related to UTMB PeopleSoft Financials system. Work involved conducting interviews with user community, building as-is process designs and recommending future-state business processes.
- Participated in business development project that required building demo Oracle Application systems (version 11.5.9) for Federal clients who include supporting configuration of Financials modules and configuring account generators to meet Oracle Projects requirements. Designed interfaces between Oracle Application systems and third-party vendors using XML Gateway.
- Establish and monitor performance metrics and measurements related to individuals, teams, processes, and projects.
- Act as solutions expert in Purchasing, Manufacturing and Distribution Planning, Inventory Control and Product Data Management to a \$\_\_\_\_\_ (revenues) \_\_\_\_\_ (type) company.
- Led a consulting team for a JD Edwards OneWorld Xe Human Resources/Payroll software implementation for a \$\_\_\_\_\_ (division revenues) division of a \$\_\_\_\_\_ (parent revenues) \_\_\_\_\_ (type) company
- Responsible for managing and implementing Approva BizRights Enterprise controls software for Oracle applications at multiple clients across multiple industries. Primarily responsible for all tasks from discovery through implementation, including planning, training, testing, and delivery.
- Specific tasks include the review of key deliverables, review of consulting partner performance, review of requirements and interface designs, and general oversight and responsibility for reporting on the progress of the projects.
- Coordinate all module teams to facilitate effective process redesign and ensure integration of modules.
- Identify issues and resolutions related to global design and lead team to milestone dates within budgetary constraints



- Conduct, develop and execute a training and communication assessment, design and strategy for a \$ \_\_\_\_\_ (revenues) \_\_\_\_\_ (type) company undergoing a JD Edwards One World software upgrade
- Led company-wide training need analysis, focus groups, and impact workshops and developed a comprehensive SAP system training
- Develop innovative communication vehicles to facilitate effective communication across regional, business unit and project team boundaries, including both internal and external stakeholders.
- Participate in projects comparing the Human Resource modules of several Enterprise Resource Planning (ERP) software packages and Human Resource Management Systems (HRMS), including JD Edwards, Oracle, PeopleSoft, SAP, Cyborg, and ADP.
- Conduct Beta Testing on JD Edwards and Siebel integration efforts
- Lead business process design and review sessions with the client to gather requirements that are used to build the Siebel System for \_\_\_\_\_ (company)
- Modify the business process flows to ensure that the functions specifications could be handled by the Siebel system.
- Create an assessment deliverable defining the scope of the project, the project plan, explanation of the current call center environment, and a recommendation on integrating the four call centers into one virtual call center.
- Configure Siebel Application and Siebel Anywhere to accommodate client business requirements.
- Work with client Project Management Office (PMO) to resolve post-implementation issues.
- Assist in the upgrade of a Siebel Call Center application from Siebel 99.6 to Siebel 2000 Dedicated Client and Thin Client using Active X.
- Configure custom Workflow Policy Columns, Objects, and Programs using Siebel Tools.
- Create test scripts and perform unit testing.
- Lead design sessions and reviews with client to define/refine project requirements and gain user acceptance.
- Configured Siebel 99.5 Energy Vertical Sales Application using Siebel Tools.
- Scope out the project's functional requirements, communicate the requirements to developers, and produce subsequent user documentation.
- Developed SAP implementation guide for \_\_\_\_\_ (company).
- Organized and coordinated team of 12 from six countries in an international SAP R/3 implementation methodology development effort.
- Integrated best practices from over 15 projects and built methodology along with consulting aids and tool reference guides.
- Identified and defined key Touch Points and processes necessary to integrate between an Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) system.
- Implemented Siebel eBusiness 2000, Enterprise and Mid-Market Editions: analyze client business requirements, manage configuration design books, validate application configurations, and provided post Go-Live support.

### Tax sample bullet points

- Reviewed client tax returns, which included research of technical tax issues
- Taught tax-related training classes to first and second year professionals
- Generate leads for and manage tax restructuring projects
- Initiate, prepare, and review tax compliance projects for firm clients
- Prepare tax returns for all types of tax entities
- Research issues and prepare documentation on tax engagements for clients (fill blanks with industry)
- Research various state and local tax issues, including unemployment insurance, net operating loss carryover, sale and use tax consequences and various state credit and incentive carryover issues

- Advise clients on proactive planning with mergers, acquisitions and divestitures of business assets and subsidiaries, and formation of special purpose entities
- Resolve federal tax implications on restructuring engagements liquidations, mergers and acquisitions, incorporation transfers, partnership formation, and transfer pricing issues
- Deliver planning advice related to unitary/separate return, partnership, single member LLC, 80/20 corporations, contract manufacturing, captive insurance company and foreign sales corporation restructuring strategies
- Prepare and review various federal and state tax revenue ruling requests and manage IRS audits
- Prepare and review large consolidated income tax returns, separate and unitary state returns, foreign sales corporation (FSC) returns, international returns (Form 5471's), tax provision work papers/cushion analysis, and SEC footnote disclosures under SFAS 109
- Provide detailed research/due diligence for mergers and acquisitions, including IRC section 338(h)10 elections, R&D credits and LIFO calculations
- Prepare and review returns for high net worth individuals with S-Corporations or Partnerships that require multi-state filings
- Prepare corporate, multistate and consolidated, large individual, gift, estate, and trust returns
- Prepare and review GAAP audited financial statements
- Prepare federal and state tax returns for large corporations' Expats/Inpats
- Research state and federal tax issues and assist in tax return processing
- Retrieve and analyze prior year tax returns
- Prepare tax equalization settlement for large corporations' Expats/Inpats
- Prepare corporate, partnership, and LLC tax returns
- Research state tax issues
- Prepare federal and state income tax returns
- Assist in tax return processing
- Perform valuations of retirement plans, produce participant statements and client reports summarizing periodic activity, and conduct payroll processing
- Reconcile transactions, such as transfers, loans, withdrawals, and rollovers
- Work exclusively with Fortune 500 clients delivering tax-planning ideas with an emphasis in Section 1341 as it relates to environmental remediation expenditures
- Identify issues that could prevent sites from qualifying under Section 1341, such as acquisitions and dispositions, demolition costs, and asbestos and other capitalization vs. deductibility issues
- Assist in preparing consolidated federal and combined state income tax returns for corporations
- Assist in preparing federal and state income tax returns for partnerships
- Calculate various M-1 items, the alternative minimum tax, and alternative current earnings state apportionment and allocation percentages, the investment allocation percentage, federal and state estimated tax payments, Sec. 163(a) interest, and Sec. 263 inventory cost
- Calculate tax depreciation expenses of large corporations and partnerships
- Prepare Form 5471, Form 5472, and Form 720 (Quarterly Excise Tax Return)
- Calculate and prepare federal and various state estimated tax payments
- Generate the book to tax reconciliation work paper
- Calculate tax depreciation expense and generate tax return work papers
- Research and draft memoranda analyzing the U.S. federal income tax implications of client transactions
- Research and draft memoranda and tax opinions
- Monitor recent tax legislation
- Conduct tax research and participate in planning for corporate and individual clients

- Analyze GL detail, GAAP financial reports and fixed-assets to prepare book-to-tax adjustments
- Perform initial review for multi-state, consolidated C-corporation, S-corp and partnership income, franchise and property tax returns
- Review and prepare large and medium corporate returns, including consolidated and multi-state corporations
- Review personal income tax returns, including multi-state
- Prepare offers of compromise with the IRS and State Tax Departments for clients
- Plan, coordinate, and execute the preparation of annual and interim financial statements for large and medium corporations
- Consult clients on income tax planning, dispute resolution and overall state tax minimization
- Consult clients on state tax optimization of e-Business initiatives
- Utilize Westlaw, CCH Online, BNA Portfolios, and Tax Analyst (or other Tax-specific software)
- Research and interpret issues of corporate law, including special licensing requirements, insurance codes and securities regulations.
- Research and author opinion letters and file memoranda on various international and domestic tax issues
- Create models demonstrating benefits of intangible property migration strategies
- Negotiate voluntary disclosure agreements with state income tax authorities
- Minimize acquired liabilities and nondeductible goodwill in foreign and domestic acquisitions through tax planning, negotiation of tax indemnities and due diligence
- Increased earnings by identifying VAT and foreign withholding tax solutions
- Consult on a multi-state and multi-jurisdictional basis with regard to income/franchise, net worth, escheat, sales/use and business license taxes
- Conduct tax planning strategy studies, reverse audits, audit defense and administrative appeals

### **Clients and markets sample bullet points**

- Research media outlets and services to achieve marketing goals.
- Manage marketing, advertising and promotional staff, agencies and activities.
- Design, develop, and implement marketing strategies to meet organizational objectives.
- Write and edit press releases, brochures, and catalog copy.
- Conduct market research studies and develop strategic marketing recommendations.
- Manage development and execution of direct mail, advertising, media and creative strategies for \$\_\_\_\_\_ client.
- Perform competitive market analysis.
- Provide marketing expertise to executive management team.
- Manage creative development process for key marketing initiatives.
- Design and implement marketing strategies for lead client resulting in \$X in increased revenue.
- Produce, manage and fulfill print, web and e-mail collateral for internal use and strategic partners.
- Develop and implement methods for tracking success of marketing campaigns.
- Draft print ads for internationally published advertisements.
- Create copy for promotional materials, mailings and advertisements.
- Develop Point of Sale marketing materials.
- Develop brand platform for complete redesign of brand identity.
- Construct and implement marketing strategies, including message development, internal programs and competitive analysis for telecommunications, financial services, and public sector arenas.
- Develop programs directed at generating “warm” leads resulting in \$\_\_\_\_\_ in revenue.\*

- Compose and implement strategic marketing plan incorporating competitor analysis, management of channel partners, advertising and public relations strategies, and implementation schedule.
- Establish relationships with potential joint venture partners to expand marketing services within specific target markets. Evaluate possible marketing avenues, including options for advertising, seminars, trade shows, partnerships and internal resources.
- Analyze potential customer base. Perform market segmentation studies and market interviews through one-on-one consultations and focus groups.
- Develop and manage production of marketing materials (print and electronic) to promote web site. Lead projects performed in conjunction with internal design team, as well as external advertising and public relations firms.
- Develop implementation schedules with major media and channel partners.
- Oversee public relations efforts for web site promotion.
- Develop and implement firm-wide marketing and communications guidelines for new products and publications; including advertising, media campaigns, website marketing, conferences and direct mail campaigns.
- Develop brand guidelines for marketing programs and materials.
- Manage overall branding and positioning of design, and oversee media campaigns, including television and radio tours.
- Establish communications plan for global network of XXX offices, develop content for newsletters and intranets; track market to identify new consulting opportunities and maintained leads database.
- Maintain marketing database to track client/contact information.
- Oversee distribution of Deloitte's publications throughout the region.
- Plan and execute local/regional seminars and briefings to build eminence, promote awareness of firm services and educate target audiences about current industry and marketing trends.
- Coordinate outbound marketing activities, promotional programs and advertisement.
- Write, edit, and produce marketing collateral materials.
- Develop, publish, and distribute web-based monthly summary newsletter.
- Design, publish, and distribute monthly electronic newsletter.
- Developing voice for marketing collateral currently aimed at attracting investors, customers and partners.
- Coordinate and prepare presentations for conferences, seminars and speaking engagements.
- Design and integrate marketing approach to establish consistent message and graphic representation for all exhibits, advertising and brochures.
- Create all advertising and sales promotional materials, including new product launch campaign.
- Control advertising budget and insertion schedule.
- Implement comprehensive and consistent Account Relationship program for top 16 global account teams to achieve \$120 million revenue increase.
- Develop marketing strategy, client relationships and integrated branded message across consulting, tax and audit businesses.
- Oversee all strategies, budget development, creative concepts, media planning, research, field marketing, special events, public relations and directories/magazine publications.
- Develop and implement marketing and communications guidelines for global firm in order to bring new products and services to market and establish effective advertising and media plans.
- Establish processes for the development of new communications vehicles.
- Establish and maintain effective working relationships with vendors and external agencies.
- Develop brand identity for new products and services.
- Develop value propositions for marketing programs.
- Evaluate marketing materials across the firm to maintain consistent brand identity.
- Design media campaigns, including television and radio tours.

- Develop and teach classes on press relations to senior staff and partners.
- Analyze customer communication needs and develop marketing communications strategies.
- Write and develop various marketing communications projects, including video, multi-media, props and displays.
- Direct the development of market-specific demographics, market share data, and business analyses reports for targeting briefings and proposals.
- Increase exposure through targeted research, writing, editing, and design of industry proposals, marketing brochures, partner presentations and direct mail campaigns resulting in \$XXXX in increased revenue.

## HR sample bullet points

### Generalist

- Manage the design and delivery of HR programs aligned with business needs based on feedback from management and employee communications channels (forums, employee opinion surveys).
- Counsel management on disciplinary actions, investigations, and terminations for consistency, risk and completeness.
- Create and implement enterprise-wide, user-friendly electronic access to information for all human resources procedures, programs, and processes specifically for management, human resources, and employees.
- Create a special incentive plan for employees to address aggressive research and development work schedule and milestone dates.
- Develop attrition plans reducing staff turnover from 12% to 9% net. Adding 58 people, versus 11 for previous year, to staff population.
- Integrated seven diverse business units geographically dispersed in the US. Partner with senior management to meld multi-systems and multi-programs into one and integrate them into unified culture and structure. Received special recognition from president for this work.
- Led two major acquisitions from due diligence to integration. Acquisitions ranged in size from \$700,000,000 to \$2,500,000,000 and from 185 to 900 employees. Serve as human resources leader in divestiture of four business units ranging from \$20,000,000 to \$200,000,000 in revenues.
- Designed and implemented new pay for customer support organization's knowledge compensation plan, aligning delivery of monies more with business objectives.
- Develop and implement field performance appraisal program based on customer satisfaction criteria.
- Implement and organize company profit sharing plan
- Work with supervisors to develop corporate job descriptions
- Investigate complaints and attend court hearings on the company's behalf (sexual harassment, wrongful termination, etc.)
- Led the reduction of cost and streamlining of the recruiting process by consolidating seven remote locations into one main area, the Staffing Center
- Conduct harassment awareness training sessions for all groups within organization.
- Implemented company handbook, orientation program, hazard communication program, and publication of first company newsletter for organization.
- Developed policies and training procedures for the worker's compensation and leave of absence programs, coordinated with the FMLA.
- Investigate employee relations issues and recommend courses of action.
- Conduct internal audits of operations to comply with departmental guidelines.
- Provide consistent training and development for all staff levels.
- Consult with management and employees to advise and/or resolve issues related to employment, employee relations, grievances, and HR policies and procedures.
- Prepare responses for EEOC charges, employment-related litigation and unemployment claims.

- Develop, implement and administer compensation programs, including job analysis, salary surveys, trend analysis, equity adjustments, market pricing, job descriptions, salary recommendations/approval and salary range structure development.
- Research industry trends and wages to determine best hiring practices and competitive compensation.
- Manage open enrollment for 401K, Section 125, health, dental and life/AD&D; liaison with insurance carriers and broker to resolve all issues.
- Research, testing, and recommendation of new HRIS program.
- Analyze usage experience and future trends to develop estimates of group insurance costs for the current and next five years.
- Develop and implement HR programs, such as performance management, employee recognition and rewards, communication programs, compensation plans, bonus schemes, management development programs, employee assimilation and learning.
- Led conversion and implementation of an integrated payroll/HRIS. This new system has cut payroll-processing time by 40%.
- Research, maintain, and implement human resources policies to ensure compliance with federal and state laws. Such policies include wage and hour, paperwork administration, and benefits administration.
- Led the transition of several employees from XYZ Corporation into our firm due to the merger (acquisition).
- Design and implement a “flexible work program” for staff
- Conduct comprehensive study of retention issues of personnel and suggest action steps to increase retention rates
- Provide statistical data to company officers concerning turnover, retention, and salary comparison reports. Recommended and implemented new company benefits, such as vision, short-term disability, life insurance buy up, and medical insurance for part-time employees. Total management turnover decreased by 7% and fewer people are leaving for salary and benefit reasons.
- Manage relationships and negotiations with external learning vendors.
- Design organization structure in support of a financial e-business strategy
- Conduct cultural audits for firms in midst of transformational change and develop strategies for cultural alignment
- Lead inclusion and diversity team with focus on culture assessment of the organization and specific interventions to address cultural issues.
- Developed Inclusion and Diversity Management System to identify specific goals with accountabilities and responsibilities as applicable for all levels of the organization.
- Coordinate and execute restructurings and workforce reductions involving up to 10% of employees.
- Implement employee communication/education programs, such as, Employee Rotation Program, Lunch and Learn Seminars, and Quarterly Awareness Campaigns to promote employee benefits.
- Formulate exit interview data into meaningful quarterly reports for executive management.
- Extract and compile a variety of personnel data for consolidation into management reports, such as turnover reports, hiring activity reports, and program usage reports
- Complete all pre-employment tests and background/DMV checks, conduct orientation for new hires and enroll in benefits, resulting in a smooth transition and lower turnover.
- Oversee new employee orientation, individually and in groups, discussing benefits, policies and company history in order to ensure consistent new hire processing and dissemination of corporate regulations and procedures.
- Disseminate new benefit information to all employees by conducting meeting and posting notices resulting in each associate possessing a thorough knowledge of new opportunities and eligibility.
- Input employee data into the HR information database and generate reports for use in tracking, analyzing and forecasting personnel needs and trends

## Recruiting

- Manage experienced-hire recruiting efforts on a national/regional and/or functional basis.
- Fulfill planned and unplanned hiring needs.
- Executed a comprehensive recruiting strategy by attending appropriate conferences/job fairs.
- Utilized select sourcing channels, direct sourcing, employee referral strategy, networking, Teleo resume database searches, and recruiting agencies to fulfill needs.
- Served as the primary point of contact on a regular basis for assigned client group on recruiting strategy, fulfillment of hiring needs, competitive intelligence, and market data.
- Developed a comprehensive recruiting strategy for planned hiring needs that addresses all possible sourcing and recruiting channels and the associated timeframes and expenses.
- Knowledge and demonstrated performance in the Federal guidelines surrounding recruiting and selection.
- Utilized applicant tracking systems, internet recruiting techniques, contact management systems, and office automation tools.
- Maintained direct interaction with partners, directors and client service professionals at all levels in order to assess needs, issues, and business strategies.
- Prepared and provided reporting, recruiting strategies, and participated in leadership meetings.
- Managed and influenced decisions relative to recruiting, selection, relocation and compensation.
- Negotiate compensation, bonus, relocation assistance and start date with all candidates.
- Analyzed the cost-per-hire and managed the resources to use the ones with the most significant impact to budget.
- Manage contingency search and research organization relationships.
- Ensure recruiting processes are effective and appropriate for both the candidate and the firm.
- Research competitive salary analysis data points with other Big 4 consulting firms to ascertain competitive offer portfolios for skills/experience in the market.
- Analyzes and monitors statistical reports, identify issues, and recommend actions.
- Ensure selling messages are integrated into the recruiting process.

## Learning and development

- Supervise the delivery of approximately 245,000 annual hours of learning options (including instructor-led, e-learning, CD-Rom, web-based, and video conferencing).
- Collaborate with and advise executives and other key stakeholders to ensure training strategies align with strategic business plans. Create and supervise full integration training and competency program to support operational performance goals.
- Lead the transition of the training function from a transactional to a strategic and partnering role with leadership.
- Create materials and conduct training seminars related to career transitioning, career enhancement, new business imperatives and professional skills.
- Interface with management to identify training needs that are linked to the business goals. Assess, develop, coordinate, and implement the appropriate training needed to achieve desired outcomes.
- Establish spending priorities and manage annual training budget of \$18 million. Since 1998 reduced total investment by 11% while increasing available options by 35%.

## Payroll

- Process bi-weekly payroll for 1000 employees using SAP
- Process weekly and monthly 940 and 941 taxes, as well as state and federal taxes, quarterly, 8027 and year-to-date payroll taxes.
- Process child support payments and unemployment claims and employment variations.

## Administrative assistant sample bullet points

- Interact with clients and internal management; edit and proofread reports; prepare PowerPoint presentations.
- Maintain highly confidential and sensitive files.
- Maintain schedules for two Partners, one Senior Manager, and four Managers and a staff of 25
- Perform Internet research for special projects
- Prepare and send bi-monthly client billings
- Set-up new client/job charge numbers; assist managers and partners with maintaining and tracking client accounting
- Order office supplies and equipment.
- Support the Partner-In-Charge of the Government Practice, as well as a team of 12 Consultants.
- Prepare client proposals and reports utilizing PowerPoint software.
- Coordinate Chairman's Office reception for 300 highest-tiered business customers. Assist in developing extensive customer profiles used by the Chairman.
- Serve as receptionist in a very high-volume customer contact area; utilize interpersonal skills to consistently convey a favorable image of the organization. Assist in the day-to-day operations of the Unit.
- Utilize the Internet to gather information on clients, annual reports and conference information
- Develop, populate, and maintain detailed databases in Microsoft Access
- Track and submit time and expense reports
- Prepare internal and external firm communications.
- Coordinate meetings (schedule and set up room, secure proper equipment, arrange for video conferencing, send reminders, arrange catering, etc.)
- Maintain Managing Partner's daily schedule and ensure all details/information are provided for meetings.
- Conduct mini training sessions to assist other administrative assistants in learning new software
- Develop and maintain electronic catalog of departmental library
- Maintain and insure compliance with internal guidelines
- Create briefing presentations and view graphs using PowerPoint

## Finance and accounting sample bullet points

- Correct prior financials/establish company procedures and financial controls
- Provide operational oversight for reporting/analysis, consolidation, cash management, GL development, branch audits, fixed assets, and lease negotiation.
- Perform financial operational audits for Division
- Calculate daily P&L and maintain margin requirements
- Maintain and present financial data related to division
- Perform corporate planning functions, including quarterly forecasts, capital budgeting, variance analyses, profit improvement plans, total shareholder return analyses, and reporting to upper management
- Develop and implement accounting procedures and internal controls designed to assure the accuracy of accounting records and to verify compliance with corporate policies and GAAP
- Lead all day-to-day accounting activities
- Prepare financial analyses for all functions in the region
- Provide commentary and insights on recorded transactions
- Act as main financial business contact within the function
- Supervise X financial analysts



- Review T&E spending for compliance with IRS regulations and firm policy
- Communicate T&E reporting errors to field personnel
- Perform ad hoc research or reporting on T&E for the field
- Provide compliance and policy interpretation for the field
- Improve accounts receivable billing and collection performance through financial controls, process improvement, and consultation.
- Provide direction to the account receivable managers supporting the client service functions. Manage accounts receivable analysts in each region.
- Facilitate firm's annual planning/financial budgeting exercises from a project management viewpoint.
- Facilitate other planning needs, such as forward looks and off-cycle plans
- Support sector functional leader and cluster leaders within the sector with all matters pertaining to financial operations management.
- Provide financial analysis and planning, with an emphasis on financial controls and process improvement.
- Led the accounting function, including financial reporting preparation and analysis, forecasting, maintenance of financial controls, accounting for new construction, budgeting, multi-division accounting and supervision of analysts for lease administration and cash management.

# Appendix D: Sample resumes

## Sample resume

### Frank Morris, CPA

1010 Main Street  
Englishtown, New Jersey 54321  
555/123-4567 Daytime  
555/234-5678 Evening  
FMorris@hotmail.com

### Summary of qualifications

Accomplished CPA experienced with both publicly traded and private entities. Extensive exposure to evaluating acquisition and financing transactions. Seasoned project manager dedicated to improving client service and enhancing managerial decision-making. Proficient in the use of PowerPoint and Excel. Working knowledge of JD Edwards and Infinium general ledger systems.

### Professional experience

#### **PricewaterhouseCoopers LLP, LAS VEGAS, NEVADA**

#### **Audit Manager**

#### **September 1999-Present**

Responsible for overall assurance services to a broad base of the firm's clientele, including publicly traded gaming and manufacturing companies.

- Performed agreed-upon procedures for the \$220 million purchase of a major gaming property, including the examination of working capital and adjustments required by the purchase agreement.
- Review financial statements and related footnotes for compliance with generally accepted accounting principles (GAAP).
- Coordinate and ensure timely filing of quarterly 10-Q and annual 10-K reports to the SEC.
- Review and interpret debt agreements and other borrowing facilities for compliance with restrictive debt covenants.
- Assess clients' internal control deficiencies and recommend efficient processing of business transactions.
- Prepare fee estimates and engagement budgets.
- Provide technical guidance and supervision to a team of 33 audit seniors and staff personnel.
- As part of the executive team, prepare and present solutions to staffing and other internal administrative issues at monthly management meetings.
- Develop course materials, coordinate and conduct periodic training seminars related to financial accounting updates, auditing techniques and emerging SEC topics.
- Participate in the preparation of audit committee presentation materials in accordance with SAS #61.

**Ernst & Young LLP, Pittsburgh, Pennsylvania**  
**Senior Accountant**  
**October 1996-September 1999**

Lead accountant responsible for the overall planning and execution of audit engagements.

- Prepared financial statements and related footnotes in accordance with GAAP.
- Performed auditing procedures on higher-risk accounts.
- Participated in the preparation and review of required SEC filings for a \$425 million IPO of a multi-national energy company.
- Planned and performed procedures for the audit of approximately \$6 million in federal grants under the provisions of OMB A-133 for a large research hospital.
- Prepared comfort letters for underwriters and reviewed required offering documents.
- Evaluated the adequacy of LIFO inventory reserves for mid-size manufacturing companies.
- Performed and reported benchmarking of key statistics of clients' major competitors.
- Evaluated the adequacy of a \$1billion self-insured pension and various post-retirement benefit liabilities.
- Designed effective analytical review procedures resulting in the timely examination of clients' financial statements.
- Responsible for the supervision of 5 staff accountants.
- Assisted in the preparation of a proposal to provide SAS #70 audit services resulting in additional firm revenue.
- Performed testing of clients' internal control system to determine scope of residual auditing procedures.

**Ernst & Young LLP, Pittsburgh, Pennsylvania**  
**Staff Accountant**  
**September 1994-September 1996**

Performed audit analyses of financial and operational activities of manufacturing and energy clients.

- Evaluated procedures affecting the processing and authorization of transactions and adherence to compliance with laws and regulations, including the evaluation of operational efficiencies.
- Interfaced and collaborated with various levels of client personnel to ensure complex transactions were properly accounted and reported.
- Assisted the senior accountant with the preparation of client financial statements and related footnotes in accordance with GAAP.
- Performed process mapping, evaluated internal controls design and tested effectiveness of design for various healthcare, manufacturing and energy clients.

**Education and professional affiliations**

Rutgers University, New Brunswick, New Jersey

Bachelor of Science in Accounting, May 1994

- Graduated with High Honors (3.5 GPA)
- Dean's List
- Golden Key National Honor Society

American Institute of Certified Public Accountants (AICPA)

Pennsylvania Institute of Certified Public Accountants (PICPA)

Junior Achievement – Volunteer Lecturer

Boys and Girls Club of America – Sponsor

## Daniel Junior

694 Buena Vista Dr., Burbank, IL 60606  
(888) 555-8357  
Dannyjunior@whoami.com

### Summary of qualifications

CISA and PMP certified executive with over fifteen years of experience in leading diverse teams, developing people, and managing projects. Results-oriented leader with a career focused on project management, risk assessment, and control consulting. Deep understanding of operational and information technology processes and the implementation of cost-effective internal controls to mitigate risks. Experience includes a proven track record of successfully working with large and highly complex organizations in various industries.

### Professional experience

**Deloitte & Touche LLP – 8/92 – Present**  
**Audit and Enterprise Risk Services, Detroit, MI and Chicago, IL**  
**Senior Manager, 9/01 – Present**  
**Manager, 9/97 – 9/01**  
**Senior Consultant, 9/95-9/97**  
**Consultant, 8/92-9/95**

#### Assessing Internal Controls

- Responsible for leading information technology and application internal control assessment activities for large companies with a combined market cap of over \$60 billion
- Led Sarbanes-Oxley 404 engagements across various industries, with an emphasis on consumer business and manufacturing
- Responsible for assessing risk, defining scope, planning the effort, budgeting and staffing resources, evaluating design and operating effectiveness of internal controls, and concluding on the impact of identified control deficiencies
- Managed overall delivery of services, which included project management activities, monitoring project status, ensuring quality of service, and communicating findings and results to senior management
- Developed and rolled out Sarbanes-Oxley 404 readiness and attestation training for over 100 employees across the Midwest region
- Regional Subject Matter Resource for integrating control and financial statement audits, as well as, the implementation of PCAOB's Audit Standard #5

#### Operational Excellence

- Organized efforts to reduce outstanding unbilled receivables from \$5.5M/month to \$1M/month
- Designed client assignment and staffing/scheduling processes for Chicago office to provide overall higher utilization and load balancing of individuals
- Coordinated monthly operational updates/webcasts for Chicago
- Facilitated a process to track sales opportunities, wins and losses utilizing CRM and reporting to senior leadership monthly results/forecasts
- Performed in-office and on-campus recruiting

#### Staff Development

- Led engagement teams of two to ten individuals and had responsibility for evaluating, counseling, mentoring, and providing feedback on performance

- Managed the performance and development of staff and three managers, including setting goals, appraising performance, and developing management, technology and audit skills
- Assessed and approved learning/training requirements for over seventy-five (75) employees in Chicago/Milwaukee over the past 12 months

### **Business Development**

- Coordinated efforts to drive additional allowable services into audit clients leading to an additional \$1.1 million in value-added services
- Co-led Project Risk Services group, including marketing, proposing, selling, and delivering services for conducting project assessments, providing project oversight, and performing project management activities
- Developed written competitive proposals and participated in oral proposal presentations in response to client demands

### **Project Management**

- Project manager for Sarbanes-Oxley readiness services to help large accelerated filers become compliant with the requirements of the Act
- Established project management office for a large telecommunications company to facilitate the oversight of fifteen interrelated projects
- Provided project oversight to a \$3 billion consumer services organization relocating a 110 person corporate office
- Managed \$12M, three year consulting engagement for a governmental agency. Began as information technology technical lead, rising to overall project leader. Key achievements include;
  - Developed, created, and enhanced documentation of policies and procedures
  - Identified, prioritized, and mitigated project risks
  - Relocated and centralized computer data center, information technology and business staff
  - Outsourced check printing activities to a third-party provider
  - Implemented technology and operational improvements
  - Coordinated and led resources aligned in areas of information technology, finance, human resources, and operations to achieve project goals
  - Implemented bank reconciliation procedures
  - Implemented plans and activities to enhance data quality

### **Education**

**Northwood University**, Midland, MI – Bachelor of Business Administration, Computer Science and Management, Summa Cum Laude, Salutatorian, May 1992

### **Certifications/professional affiliations**

- **CISA** – Certified Information System Auditor, 1995
- **PMP** – Project Management Professional, 2007
- **ISACA** – Information System Audit and Control Association
- **PMI** – Project Management Institute

### **Technology**

- Proficient in the Microsoft Office suite  
Multiple Operating Systems including Unix (many variations), Windows, AS/400, Mainframe, DEC VAX

## **Scott A. Simpson, CPA, CFP**

742 Evergreen Terrace  
Springfield, TN 49007  
(322) 335-5353 (Office)  
(322) 335-3535 (Home)

### **Employment**

#### **February 1999 – Katz, Sapper & Miller, LLP, Carmel, IN Present – Senior Manager Personal Financial Planning**

Consultant in personal financial planning group. Financial and investment planning, retirement planning, estate planning, stock option analysis, and income tax planning for high-net-worth individuals and corporate executives. Review of fiduciary income tax returns, estate and gift tax returns, charitable remainder trust returns, individual income tax returns and partnership tax returns. Published article on stock options in “The Indianapolis Star – Your Money.”

#### **April 1997 – KPMG, LLP, Indianapolis, IN and Norfolk, VA February 1999 – Manager Personal Financial Planning**

Financial planning for high-net-worth individuals and corporate executives including estate planning, retirement planning, income tax planning, investment planning, business succession planning, and charitable contribution planning. Marketing to various corporations for executive financial planning packages. – Designated “GSTT Specialist.”

#### **Jan 1995 – Failes & Associates, P.C., CPAs and Consultants, Chesapeake, VA April 1997 – (Recently merged with Cherry, Bekaert & Holland, CPA) Supervisor Estates and Trusts**

Estate planning and administration. Preparation and review of estate/trust related tax returns, individual income tax returns and business tax returns. Designated to perform tax research for all four offices. Participate in IRS estate and gift tax audits. Member of marketing committee targeting Law Firms. Manage and train employees on RIA Onpoint Research on CD-ROM.

#### **June 1990 – Williams, Mullen, Clark & Dobbins, P.C., Attorneys at Law, Jan 1995 – Virginia Beach, VA PARALEGAL – Probate Law, Estate Planning, Taxation**

Estate planning and administration. Post-mortem tax and distribution planning. Prepare US Estate Tax Return (Form 706), gift tax returns and fiduciary income tax returns. Participate in IRS estate tax audits. Prepare all probate filings for courts and Commissioners of Accounts and related tax returns. Draft Wills, Revocable Trusts and Irrevocable Trusts. Perform legal and tax research.

## Education

### 1994

Old Dominion University  
Nondegree Graduate Student, Accounting Curriculum,  
Passed all sections of November 1996 CPA exam

### 1990

Old Dominion University  
Bachelor of Science, Political Science,  
Paralegal Certificate

## Affiliation

Indianapolis Estate Planning Council  
AICPA

## George O. Bailey

100 The Woods Drive  
Oakland, CA 95684  
Home: (520) 879-9856  
Office: (520) 879-9857  
georgebailey@yahoo.com

## Experience

### 2000 – Present

#### **PricewaterhouseCoopers LLP San Jose, CA**

##### **Experienced Manager, National Transfer Pricing Services**

- Sold and managed projects generating \$1.2 million to meet deadlines and budgets, including negotiating fees, budgeting and staffing decisions.
- Consulted to 17 clients in the recent fiscal year. Provided economic assistance with all aspects of transfer pricing to multinational clients in a variety of industries. Predominantly worked on intangible property structuring, cost sharing and global documentation projects.
- Assisted two B2B exchanges in the chemical and electronics industries with the valuations of their intellectual properties that were licensed to offshore entities for joint venture purposes.
- Assisted a start-up specializing in teaching the English language over the Internet with the valuation of its technology that was licensed to its offshore subsidiary. Project included setting up cost-sharing schedules.
- Assisted a manufacturer of Voice-over-Internet equipment with the valuation of software technology that was developed by a recently acquired start-up company in Europe.
- Assisted a manufacturer of DSL equipment with the tax optimization and documentation of its intercompany transfer pricing arrangements with its foreign subsidiaries that develop different aspects of the technology, distribute and install the equipment.
- Assisted a syndicator of information over the Internet with the economic valuation of its technology that was licensed to an offshore entity for joint venture purposes.



- Assisted a provider of web hosting services and a PDA manufacturer with the determination of arm's length buy-in royalties and economic life of technologies. Analyzed and documented cost sharing arrangements for the development of existing and future intangibles.
- Developed an approach for the determination of arm's length buy-in royalty rates, which is applicable to a wide range of Internet start-up companies by treating them as intermediaries.
- Mentored three consultants on my team.

## **1998 – 2000D**

### **Deloitte LLP Dallas, TX**

#### **Manager, Transfer Pricing Consulting Services**

- With colleagues, established the transfer pricing practice in Dallas.
- Developed both new clients and relationships with existing clients.
- Prepared transfer pricing studies under U.S., Mexican and OECD standards to assist clients with intercompany transfer pricing and tax planning in the aerospace, electronics and telecommunication industries.
- Applied statistical techniques and capital adjustments to benchmark clients.
- Mentored and trained staff and senior consultants.
- Devised valuation and pricing techniques for intellectual property studies.

## **1996 – 1998**

### **Arthur Andersen LLP New York, NY**

#### **Senior Consultant, Transfer Pricing Consulting Services**

- Assisted multinational companies in establishing or defending transfer prices charged to related parties for goods, services or the use of intangible assets in the automotive, pharmaceutical, sporting products, financial, discount brokerage, banking, publishing, refractory etc. industries.
- Recruited, supervised staff consultants and interviewed clients.
- Performed financial analysis and valuation of intangible assets.
- Provided economic analysis support to Advance Pricing Agreement on the value of trademarks and names.

## **1995 – 1996**

### **Northeastern University Boston, MA**

#### **Database Developer**

- Developed a database-spreadsheet product and coordinated a cost-reduction project for the Snell Library. Achieved 15% cost reduction on 1.8 million expenses on serials.

## **1993 – 1995**

### **Bentley College Boston, MA**

#### **Graduate Assistant**

- Assisted faculty in econometric modeling using statistical software.
- Created a powerful research tool for graduate students by designing and developing a database on Environmental Economics.

## Education

- **Bentley College**, Boston, MA, 1993-1995
  - M.S., Business Economics.
- **University of National and World Economy**, Sofia, Bulgaria, 1995-1998
  - M.S., International Business.
  - Ph.D., Economics. Dissertation defended in July, 1998.

## Publications

“Dispersion of prices as a source of inflation”, Journal of Economic Theory, #4, 1997, Economics Institute of the Bulgarian Academy of Sciences, Sofia

“International Transfer Pricing”, Journal of Economic Theory, #5, 1998, Economics Institute of the Bulgarian Academy of Sciences, Sofia

## Personal

Native language Bulgarian. Fluent in English, Russian and Macedonian, some French and Spanish. U.S. permanent resident

## James O. My

225 James Place  
Consulting, PA 12345  
(555) 422-1781 Cell  
jomy@yahoo.com

A seasoned professional with Big 5 consulting, strategic alliance and sales experience.

### Areas of expertise

Solution Sales	Project Management	Business Strategy
Strategic Alliance	HR Strategy	Team Building
ERP Technology	Methodology Execution	Facilitation Leadership
Marketing Strategy	P&L	Change Management

### Professional experience

#### **MindChisel Inc.** **Director of Solutions** **Pittsburgh, PA** **2001 to present**

Lead and responsible for all pre/post Sales, Alliance, Project Management, and Professional Services for this start-up company providing corporate communications software to Fortune 2000 clients.

- Developed go-to-market strategy for two ASP software products.
- Expanded the existing base product offering and created a “total solution” package.
- Project management responsibilities for all implementations, from “scoping and planning through delivery.”
- Executive and Director-level sales and project management relations to clients.
- Worked with retail, non-profit financial services and manufacturing vertical clients.

#### **OmniSpace Technologies** **Alliances/Account Manager** **Dallas, TX/Pittsburgh, PA** **2000 – 2001**

Partnered, aligned, sold and project managed an enterprise ASP collaboration/CRM platform solution on an executive level to all service lines within the professional services vertical.

- Developed and managed an enterprise partnership/alliance with Deloitte and Arthur Andersen to implement/rollout collaboration solution throughout various practices.
- Had total P/L responsibility within all professional service client accounts.
- Project managed multiple implementations across the U.S.
- Sold \$3.5 million in licenses and services.

**Deloitte**  
**Sr. Consultant, Atlanta, GA**  
**1998 – 2000**

Management consultant focused on Fortune 500 clients within the ERP (SAP and PeopleSoft), Business Process and Change Management verticals.

- SAP Functional Implementation Project Leader for an internal Deloitte project. Responsible for managing 6 staff members (consultants and client), management of the project work plan, and complete project life cycle from scoping and planning through delivery.
- Delivery Lead for a PeopleSoft rollout for a \$4 Billion Insurance company.
- SAP Functional Implementation Project Leader for a \$700 million distribution company, complete project life cycle, and managed two team members.
- Managed vendor relationships with third-party software company.
- Sold additional project work of \$750,000.

**Cap Gemini Ernst & Young**  
**Sr. Consultant, Houston, TX**  
**1996 – 1998**

Management consultant focused on Fortune 500 clients within the Enterprise Resource Planning (functional SAP-HR and PeopleSoft-HR), Business Process and Change Management verticals.

- Project leader for business strategy and business process team to create and build a shared services organization for a large Healthcare organization. Managed 5 team members.
- Project Leader for functional SAP Implementation for Healthcare organization, managed three resources.
- Functional SAP team leader for projects in the Chemical and Petroleum industries.
- Sold additional project work of \$200,000.

**Baker Hughes Inc.**  
**Corporate Recruiter/Generalist, Houston, TX**  
**1994 – 1996**

Managed and conducted all corporate and divisional hiring functions for this Oil and Gas service company.

- Designed human resource policies, recruitment and selection processes, performance management, compensation and reward programs.
- Designed computer-based training (CBT) program.

**Training**

- Project Management
- Solution Selling
- Large Account Management
- SAP-HR Academy 3.0F
- Teaming and Leading
- Business Change Management Implementation
- Recruiting, Selecting, Hiring and Orientating Employees

## Education

BS in Marketing, Louisiana Tech University, November 1994

## A. Sharon

Consulting  
469 Consulting Avenue, Apt# P  
Palo Alto, CA 94306  
Phone: 555 321 5568  
a\_sharon\_consulting@yahoo.com

### Summary of qualifications

- More than seven years experience in market strategy, customer relationship management, and e-business enablement – Conducted many projects with wide range of clients, focused on enhancing their business operations through process optimization, creation of a strategic roadmap and action plan.
- Strong project management experience – Long experience working directly with clients on key projects from discussion of project scope to project-team set-up and to final strategy delivery.
- Strong team work and analytical skills – 108 – Superb problem-solving skills. Well organized, quick learner and very detail oriented. Good experience working in team-based projects, including work done demanding multi-national engagements.

### Education:

- **Harvard University** (Cambridge, MA)  
MA, Regional Studies, June 1994
- **National Taiwan University** (Taipei, Taiwan)  
BA, History Department, June 1991

### Professional experience:

#### **Deloitte, Taiwan (August 2000 to January 2003)** **Senior Consultant**

Highlights of experience:

- Formulate the CRM strategy and design process for government-sponsored industry research project office in Taiwan
- Carry out e-Business planning for a major Taiwanese cell phone retailer – Analyzed business landscape and optimized channel dynamics and corporate operations
- Establish e-business strategy for –
  - A major financial service industry conglomerate
  - A large Taiwanese OEM component manufacturer
- Set up Customer Service Call Center for a Digital Cable TV company – Optimized process for customer service operations, identifying technical problems and executing customer FAQs
- Formulate Asian market entry strategy for a major US consumer electronics retailer – Assessed opportunities in major Asian markets and ranked market entries based upon their client-specific requirements
- Design e-Learning strategy and roadmap for an electricity power company. Assessed Internet usage by employees, training policies, and its IT infrastructure to develop an overall e-Learning roadmap and implementation plan

#### **ARC Consultants Ltd. (June 1999 to July 2000)** **Research Manager**

In charge of strategic research and consulting projects for:

- A leading global IC design company – Conducted market entry for an Internet Appliances and DVD chip within the Chinese market
- An e-Commerce maturity scorecard project for Taiwanese Ministry of Economic Affairs – Provided comprehensive criteria to evaluate a company's readiness, strength and weakness to do eCommerce
- A financial service website – Researched determined website's online behavior
- A Taiwanese Customer Relationship Management Survey – conducted the first Customer Relationship Management Survey in Taiwan for top 1000 enterprises

**Dresdner Asset Management (March 1998 to May 1999)**  
**Senior Analyst**

Conducted analysis of electronics and IT industry within Taiwan on behalf of fund managers, brokers and individual investors. Representing Dresdner, appeared in weekly TV investor broadcasts speaking on personal investment strategies.

**Hong-Fu Securities Co. Ltd (November 1997 to February 1998)**  
**Assistant Manager**

Analyzed major publicly listed electronics and IT companies in Taiwan. Also led an internal training program for company's equities research and sales departments.

**Industry Analyst of Market Intelligence Center of the Institute for Information Industry (MIC/III) (July 1995 to October 1997)**  
**Industry Analyst**

Analyzed the IT industry in Southeast Asia and the opportunities for offshore production by Taiwan computer manufacturers – Ministry of Economic Affairs and Taiwan IT vendors.

**Major qualifications:**

Institute for Information Industry (Taiwan)  
 Certification in Database programming, primarily Oracle

**Languages:**

Native fluency in Mandarin and spoken English  
 Intermediate fluency in Japanese

**Computer skills:**

MS Office, MS Projects, SPSS, Siebel, Oracle

## Katie Smith

4145 N. Hermitage  
#4B Chicago  
Illinois 60657  
Phone: 312 555 1212  
katiesmith@msn.com

Highly motivated professional with deep treasury and cash management experience. Results driven and focused on identifying and implementing improvement opportunities that directly impact the bottom-line. Proven results in increasing revenue and profits through innovative solutions. Strengths in:

- Treasury and Cash Management Process Redesign
- Treasury Organization Development
- Bank Service Assessment and Selection
- Remittance Processing
- Treasury Technology
- Treasury and Cash Management Controls•Project Management
- Report and Presentation Writing
- Business Development
- Effective Client Relationship Management
- Recruiting and Maintaining High Performance Teams
- Staff Resource Development and Mentoring

## Experience

### **Deloitte & Touche LLP (Chicago, IL) (December 1997-Present)** **Global Markets Practice: Senior Manager**

Responsible for development of Treasury Services service line of Global Markets Practice

- Defined product offerings: Treasury and Cash Management Assessment and Design, Financial Risk Management Reviews, Credit Risk Management Reviews, and Capital Structure/Liquidity Management Assessments
- Developed Treasury Services credentials, including brochure and Treasury Team book
- Responsible for \$1.8 to \$2 million in sales and management of Treasury Services work
- Coordinated 25 national Global Markets resources to ensure appropriate staffing for clients

Led treasury and cash management assessment and redesign projects (ranging from \$70,000 to \$600,000 in fees) in the retail, telecommunications, manufacturing, insurance, and energy industries. Responsible for all aspects of engagement including work plan development, staffing, budget management, billing, analyses, recommendation development, report/presentation writing, client relationship management, and staff performance evaluations

- Identified opportunities to achieve significant quantifiable annual savings totaling to approximately \$14 million
- Diagnosed clients' operations and developed tailored solutions resulting in:
  - Improved cash flows: \$245 million
  - Reduced non-earning assets: \$189 million
  - Reduced expenses: \$5 million



- Realigned treasury organizations with defined roles, responsibilities, and accountabilities
- Better use of technology
- More effective management of financial exposures
- Selected as participant in Partner Development program
- Top performing Senior Managers are mentored/coached to strengthen and build skills required of partners, and assisted with development of action plan to become partner
- AAA Consulting Company (Chicago, IL) January 1995-December 1997

### **Derivatives and Treasury Risk Management Practice: Manager**

Specialized in corporate treasury consulting for Fortune 500 companies

- Directed Treasury and Working Capital Management Reviews, which resulted in total direct bottom-line savings of approximately \$10 million
- Designed and implemented “world-class” treasury/cash management organizations to better manage cash flows and treasury/cash management activities
- Clients have achieved economies of scale from consolidating banking services, gained operational efficiencies and reduced opportunity costs by mobilizing non-earning assets, increased funds management controls and centralized management of foreign currency exposures

Responsible for developing growth and sales strategies for DTRM corporate treasury consulting business – revenue increased from \$350,000 to \$2 million

- Identified, generated, and managed annual revenues of over \$1 million
- Defined core competencies of DTRM’s corporate treasury consulting business
- Led new hire recruiting initiatives of the DTRM Practice and served as a mentor to manager, senior, and staff consultants; developed training program

### **BBB Consulting Company (Chicago, IL) (July 1989-January 1995)**

#### **National Cash Management Consulting Practice: Manager**

- Directed Cash Management Reviews for Fortune 1000 companies resulting in increased cash flow, increased interest income, and reduced expenses
- Performed Remittance Processing Operations Consolidation Reviews for corporations to determine optimal scenarios for remittance processing
- Conducted Reserve Requirement Reviews for financial institutions to reduce non-earning assets
- Analyzed data from annual survey of Cash Management industry and identified trends in volume, product features, revenue, and pricing of participating banks
- Drafted proposals for prospective clients and reports summarizing findings of engagements

### **Bank of America, N.A. (San Francisco, CA) (June 1988-August 1988) Credit Analyst Intern**

- Completed intensive training program, focusing on credit analysis and risk assessment – specialized in analyzing investment banks through the Broker/Dealer division
- Analyzed credit relationships with various companies and determined optimal amount of credit exposure to be allocated to each company

## Education

### **Illinois State University, Bloomington, IL**

Bachelor of Science in Business Administration – Finance Major May 1989

### **Certified Cash Manager (CCM) (since 1997)**

- Member of the Association for Financial Professionals

### **Computer skills**

- Proficiency in Microsoft Word, Microsoft Excel, and Microsoft PowerPoint

## Amelia Evans

205 S. Franklin Ave.  
Paduca, CA 90605  
Home: 888 555 2983  
Cell: 888 555 6343  
myemail@yahoo.com

A business development professional with six years marketing, database and Web programming experience in corporate, academic and not-for-profit settings. Extensive project management experience taking projects from initial scope discussions to product setup and final delivery. Proven teamwork and analytical skills. Detail-oriented organizer with strong problem-solving skills and an ability to reach consensus among diverse groups.

## Experience

### Deloitte & Touche LLP, Los Angeles, CA (June 2001 – present)

#### Marketing Manager

Responsible for all aspects of the creative development process for key marketing initiatives in accordance with firm branding standards including scheduled e-mail correspondence, Web site graphics, promotional materials and other programs. Research media outlets and services to achieve marketing goals. Develop and implement methods for tracking success of marketing campaigns. Develop and facilitate workshops on a variety of technical applications to internal Partners and staff. Manage client expectations by proactively advising on technical issues and communicating proposed solutions.

Data management responsibilities include developing procedures for new data imports, distributing critical reports to colleagues around the country and developing routine cleanup functions using SQL query manager to ensure database integrity. Develop and execute complex SQL queries to generate reports. Test new Web site components and generate detailed feedback reports. Assist lead developer with Web site development and programming on a variety of internal and external tools.

#### Key accomplishments

- In response to a marketing campaign, identified the need to provide regular reports to Firm leadership. Created a standard request document based on historical inquiries for data, which in turn allowed regional managers to easily determine their client's needs. This process resulted in the ability to provide accurate reports in the shortest amount of time possible.
- Due to redundant information being imported into a database from a variety of sources, developed and implemented a series of procedures for dealing with duplicate data. Records were refined so that only the most current information was available for use. As a result, data was more reliable, which allowed local office Partners to better manage relationships with clients.
- Department growth produced the need to report various key statistics on a regional basis. Worked with national team to identify key site metrics and developed a system which displayed results on a national, regional and local basis. System was used for review of both program and aggregate teams, presentations to national leadership and other business development related activities.
- Developed and managed production of marketing materials to promote Web site, resulting in a 25% annual increase of registered users. Examples include:
  - Produced monthly e-mail correspondence with key constituents
  - Targeted e-mail messages based on various factors, including industry, career level and location
  - Managed the production of printed letters designed to keep existing data up-to-date

- Developed and distributed access letters and promotional pieces
- Developed and managed numerous contests and other promotional events

**Fullerton College, Fullerton, CA  
(September 2000 — December 2001)  
Adjunct Instructor of Philosophy**

Organized and taught three sections per semester. Responsible for all aspects of class development, grading and counseling

**Pitzer College, Claremont, CA (May 1999 – March 2001)  
International Programs Coordinator/Multimedia Specialist**

Directed, organized and supervised all activities and aspects of short-term language and other grant-related programs throughout the academic year. Prepared budget and budget forecasts, monitored expenditures and prepared recommendations on facilities, equipment and staffing requirements. Supervised staff personnel, including employee relations, selection, training and staff development. Produced all related advertisements, written correspondence and orientation materials. Supported the development of Web pages, databases and other electronic promotions, record keeping and educational documents and systems. Managed an international language computer laboratory and library.

**Key accomplishments**

- Identified host families for an international student exchange program. One family, after being selected for a program, had a negative experience with a student and was considering dropping out of the program. Conducted a follow-up interview and ascertained certain difficulties, including a lack of communication between the family and the student. Retained relationship with the family by redefining their expectations and providing guidance on how to handle similar situations. As a result, the family continued to work with the university and became regular hosts.
- A unique group of Japanese students approached department with a request to attend language and engineering classes with a consortium member on a week’s notice. Assembled a team to set logistics, establish curriculum and identify graduate students capable of teaching classes and who were fluent in Japanese. Students were included in a prestigious engineering program, designed to assist corporations with real-life engineering issues. The project was successful and became an ongoing program for the university.

**Claremont Graduate University, Claremont, CA  
(October. 1998 – May 2000)**

**Technical Specialist**

- Coordinated and advised Web development structure for all departments
- Created content-specific multimedia presentations for faculty members
- Regularly facilitated classes in new media, Microsoft Office, and Adobe Photoshop

**Education**

**Claremont Graduate University, Claremont, CA**

**Master of Arts in Contemporary Philosophy**

**University of Pennsylvania, Philadelphia, PA**

## **Bachelor of Arts in Philosophy**

**Computer Languages:** XML/XSL Visual Basic.NET Java Script  
SQL HTML/DHTML/CSS.ASP

**Computer Skills:** Visual Studio.NET SQL Server 2000 Windows/Office  
Dreamweaver Flash Photoshop 6.0

## Mary M. Newton

14435 West Greenwood  
Bartlett, Illinois 62062  
Phone 312) 555 1144  
mmnewton@msn.com

### Professional experience

#### Deloitte, Chicago, IL, 1990 – present

National Human Resources: Project Leader 1998-2001, Professional Development Manager 2001-present.

#### Professional Development and Performance Management

- Led design and implementation of performance management system for firm's practice operations (e.g., Finance, HR, Marketing, etc.) staff. System includes career planning, mid-year and year-end reviews and a comprehensive competency model. System is the first nationally consistent performance management process for the practice operations staff and is currently used by 3,000 professionals. Led global design team of 24 professionals, developed and executed all internal communications, developed support materials (e-learning training module, user guide, FAQs, etc.) and trained field HR professionals.
- Led comprehensive redesign of firm's performance management system for client service professionals. Scope included new, simplified forms, streamlined process and new enabling technology. System is currently utilized by 12,000 client service professionals nationally. Led a national design team, developed systems requirements for the enabling technology, and developed all communications and training materials.
- Developed comprehensive learning curriculum for 4,000 managers and partners who handle performance support and performance management for firm employees. Curriculum includes face-to-face workshops with application exercises and e-learning modules. Centra virtual classroom software was used to train over 100 HR professionals and lead managers/partners from 30 cities to deliver the curriculum.
- Coordinated the firm's process for Upward Feedback on semi-annual basis. Open to 15,000 firm professionals in 34 cities. Coordinated vendor relationship and activities, prepared and validated participant lists, coordinated feedback reporting process, determined system modifications, and developed and executed communications plan for process.

#### Compensation

- Implemented variable compensation program comprised of bonus and profit-sharing components. Coordinated with legal counsel to define parameters of program, documented program guidelines for HR professionals in field, defined systems requirements to track program participation and awards, prepared quarterly financial information related to program targets and coordinated with communications function regarding all internal and external communications.

#### HR Models and Career Paths

- Led team to design multiple HR models for consulting practitioners, based on service models within firm. HR models encompassed recruitment, career paths, learning and development, and leverage models, including economic impact of various leverage ratios.
- Designed new career path for technical specialists within firm. Worked with leadership to define new path in context of firm's competency model, determined eligibility for the path and developed communication materials.
- Participated on team to develop consistent job evaluation classification methodology for firm's practice operations staff. Defined overall structure for job functions and families, created career level guide, integrated practice operations competency model with classification scheme, created technical competencies for job families, developed communications plans and mapped individual jobs to new model.

## Other

- Assisted with HR benchmarking study with goal to better understand HR best practices and enhance firm's status as employer of choice.
- Developed HR Strategic Plan for National HR function. HR strategy was formulated in context of overall Deloitte strategy and analysis of key external HR and business trends. Plan included as-is assessment of firm HR programs and policies and new initiatives which should be undertaken to better align HR with external trends and internal strategy and needs.
- Conducted annual analysis of firm's direct admit partners for the Board of Directors. Analysis compared direct admit partners to internally developed partners on seven key dimensions.
- Prepared annual operating (\$1.5 – \$3.5 million) and project budgets (\$25,000 – \$500,000) for National HR function.

## **Management Consulting: Senior Consultant 1990-1992, Manager 1992-1995, Senior Manager 1995-1998.**

- Directed human resources and recruiting activities for management consulting department of 50 professionals. Assisted in development of hiring plans, screened resumes, developed local office recruiting literature, conducted interviews, coordinated campus events and office visits, coordinated new hire orientation, and assisted with implementation of various human resources initiatives.
- Provided consulting services to over 100 clients in areas of business and strategic planning, process reengineering, organizational restructuring, prospective financial information, budgeting and profitability accounting, and operations improvement. Consulted in variety of industries, with emphasis in financial institutions and K-12 public education.
- Assisted partner in developing a national center of expertise for firm in K-12 public education. Participated in preparation and presentation of proposals to secure engagements with key clients, developed marketing materials and statement of qualifications, trained staff members to support industry practice area and participated in national planning and sales lead generation efforts for the industry.
- Managed day-to-day activities of over 70 engagements with staff of up to 20 professionals. Developed engagement work plans, communicated project issues and findings to client management, managed project budgets (up to \$750,000), structured tasks for project staff members, and created engagement end products which identified implementable solutions for client's business problems.

## Education

**Masters of Business Administration, Finance; May, 1990. Northwestern University, Kellogg School of Business.**

**Bachelors of Science in Education with highest distinction, Secondary Mathematics and Chemistry; May, 1988. University of Illinois.**

## Computer skills

**Expert or proficient skill level in:**

- MS Word•MS PowerPoint
- MS Outlook
- e-Room
- MS Excel
- MS Project
- MS Visio

## Professional associations

- Society for Human Resource Management, Member
- Beta Gamma Sigma Business Society, Member
- Phi Kappa Phi National Honor Society, Member



## Jane Doe

1111 Apple Blossom Street,  
Apt 125, Chicago, IL 60657  
Phone: 312.555.5555  
janedoe@yahoo.com

### Education

**Master of Business Administration, Kellogg Graduate School of Management, August 2003**

**Northwestern University, Chicago, Illinois**

**Concentrations in Management and Strategy, Organizational Behavior**

**Bachelor of Administration–Honours (Cum Laude), March 1995**

**University of Illinois, Champaign, IL**

**Major in Finance, Minor in Communications**

### Professional Experience

**Deloitte & Touche LLP, Chicago, IL June 2002 – present**  
**Senior Manager, International Assignment Services**

- Managed 15 client relationships in a variety of industries including manufacturing, health care and banking, representing approximately \$750,000 in annual business.
- Supervised nine senior consultants and staff associates across engagements; directed them on resource allocation, methodologies, and budgeting; guided technical research to ensure optimal client solutions.
- Designed effective compensation strategies for international corporate clients and their international assignee populations.

**Hewitt Associates, Lincolnshire, IL**  
**(November 1998 – June 2002)**

**Manager, International Employment Solutions**  
**(September 2000 – June 2002)**

- Managed client relationships and supervised client service engagement teams; coordinated annual tax return preparation for international assignees, directed assignment tax planning and ensured worldwide tax compliance for clients' expatriate populations.
- Co-led development of marketing plan for introduction of HR outsourcing services.
- Evaluated and restructured a primary expatriate tax engagement; achieved 20% cost reduction over 2 years.

**Senior Consultant, International Employment Solutions**  
**(November 1998 – August 2000)**

- Ensured worldwide tax compliance for clients and their international assignees.
- Conducted and reviewed tax research for multinational companies.
- Supervised tax assistants on multiple client service teams.
- Liaised with IRS authorities for clients.

## Foreign Languages

Fluent in Spanish

## Suzanne Barnes

1234 Oak Lane,  
Acorn TN 55555  
Phoen: 555 555 1111  
rbarnes@email.net

### Qualifications Summary

Administrative Support professional experienced working in fast-paced environments demanding strong organizational, technical and interpersonal skills. Trustworthy, ethical and discreet, committed to superior customer service. Confident and poised in interactions with individuals at all levels. Detail-oriented and resourceful in completing projects; able to multi-task effectively. Capabilities include:

- Customer Service and Relations
- Accounts Payable/Receivable
- Telephone Reception
- Word Processing and Typing
- Filing and Data Archiving
- General Accounting
- Computer Operations
- Office Equipment Operation
- Problem Solving

### Experience Highlights

#### Administrative Support

- Performed administrative and secretarial support functions for the Vice President of a large sportswear manufacturer. Coordinated and managed multiple priorities and projects.
- Provided discreet secretarial and receptions services for a busy family counseling center. Scheduled appointments and maintained accurate, up-to-date confidential client files.
- Assisted with general accounting functions; maintained journals and handled A/P and A/R. Provided telephone support, investigated and resolved billing problems for an 18-member manufacturer's buying group. Trained and supervised part-time staff and interns.

#### Customer Service and Reception

- Registered incoming patients in a hospital emergency room. Demonstrated ability to maintain composure and work efficiently in a fast-paced environment while preserving strict confidentiality.
- Conducted patient interviews to elicit necessary information for registration, accurate prioritization, and to assist medical professionals in the triage process.
- Orchestrated hotel special events and reservations; managed customer relations and provided exemplary service to all customers.

#### Management and Supervision

- Promoted rapidly from front desk clerk to assistant front office manager at an upscale hotel. Oversaw all operations including restaurant, housekeeping and maintenance. Troubleshoot and resolved problems, mediated staff disputes and handled customer complaints.
- Participated in staff recruitment, hiring, training and scheduling. Supervised a front desk staff.

## Employment History

**ACCOUNTING ASSISTANT, Guardian, Inc. Gothic, TN**

**PATIENT SERVICES REGISTRAR, Grogan Health System Hospital, Littleton, MA**

**ASSISTANT FRONT OFFICE MANAGER, Sheraton Boston Harbor, Boston, MA**

**RECEPTIONIST/SECRETARY, Family Counseling and Guidance Center, Boston, MA**

**ADMINISTRATIVE ASSISTANT, Greenland Sportswear, Chesapeake, MA**

### Education and Training

Grogan College, Littleton, MA (1988-1989)  
Concentration in Business Administration

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Technical College, Littleton, MA  
(1999-2001)

Hager College, Gothic, TN (2003-Present)  
Introduction to Computers and MS Office 2000

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### Community Involvement

Committed to community services. Extensive volunteer history includes involvement in public schools, Habitat for Humanity, children's homes, and community soup kitchens, work with the elderly and quilts for children with cancer.

## Gary Spieder

968 Johnson Avenue  
Saint Paul, MN 55105  
Telephone: 651-555-1212  
E-Mail: gspieder@whoami.net

### Summary of Qualifications

#### **Senior business development specialist with Japan and Asia Pacific market experience.**

- Manufactured products orientation
- Focus on creative market and revenue growth strategies
- Adept in the leadership of large-scale transformation

### Professional Experience

**September 1996 – Present**

**Senior Manager: 1999-Present**

**Manager: 1997-1999**

**Senior Consultant: 1996-1997**

#### **Deloitte Touche Tohmatsu, Management Consulting Deloitte Consulting LLC, USA**

Senior leader for the delivery of strategy and operations services to clients in the diversified and industrial products segment of the manufacturing industry. Regional service line leadership team for Customer and Market Strategy practice.

**April 2001 – April 2006  
Tohmatsu Consulting Co. Ltd, Japan**

Recruited by Deloitte Consulting's Global CEO for an expatriate leadership assignment. Responsible for the enhancement of Deloitte's strategy and operations consulting services in Japan.

### Experience Highlights

#### **Regional Market Development**

Provided leadership to enhance the delivery of revenue enhancement services to multi-national clients with business operations in Japan.

- Recruited and developed bi-lingual core team focused on customer and market strategy consulting services. Established regional network of multi-national business leaders as a target segment of new business opportunities.
- Contributed to 37% revenue growth over five years while increasing revenue contribution from multi-national clients by 17%.

## Market and Channel Formation

Launched and provided service delivery leadership for a specialized strategy and operations consulting practice focused on the Japanese pharmaceutical industry.

- Conducted analysis of the market opportunity and developed initial business plan. Recruited a senior practice leader and established a marketing partnership to commercialize a leading clinical trial management solution for the Japanese market.
- Secured engagements with five new accounts in first 18 months and established a new line of business on plan to deliver \$8-10 MM in annual revenue.

## Market Strategy Refresh

Fortune 50 specialty chemical manufacturer facing low-cost competition and escalating raw-material costs sought performance improvement strategies for seven Japan-based joint ventures.

- Led team of ten analysts to conduct a structured review of pricing and margin management business processes. Developed business specific profitability models. Engaged sales and business leadership in the development of fact-based margin improvement strategies.
- Validated transactional pricing process and cost reduction recommendations that enabled \$30 MM in variable margin improvement.

## Regional Markets Turn Around Strategy

Global automotive manufacturer facing business failure required an accelerated assessment of their global operations to identify “game changing” strategic scenarios and secure a new round of capital investment.

- Led team of twelve to conduct an assessment of Asia operations including growth strategies for the Chinese market.
- Identified five integrated strategies to reduce operating expenses by \$750 MM over four years and increase investments in China to enable \$550 MM NPV.

## Joint Venture Marketing and Sales Strategy

Developed core marketing and sales effectiveness strategy for a newly formed joint venture in Japan to launch a direct-to-consumer sales channel.

- Established channel segmentation, prioritization and value proposition framework. Designed sales business planning and resource allocation tactics.
- New joint venture successfully launched with revenues of \$130 MM in the first year. Business on target to obtain 18% revenue growth with a 2.5% gain in operating margin.

## Joint Venture Restructuring

Global industrial equipment manufacturer sought to restructure Japan joint venture to achieve better alignment with market growth opportunities in Japan and the Asia-Pacific region.

- Engaged JV partners in an objective assessment of strategic scenarios
- Built consensus for a preferred option to change the JV ownership structure and target a 20% increase in revenue and a 50% increase in profits.

## **Sales Force Transformation**

US division of a global industrial products company with revenues of \$3 billion desired to benchmark current sales and marketing capabilities, establish performance improvement targets, business case\_ and transformation roadmap.

- Developed customized maturity model to assess current practices against performance leaders. Conducted 25 executive alignment interviews. Facilitated a series of three strategy workshops with the top 50 sales and field operations managers. Conducted a web survey of 700 person US sales force.
- Identified \$29 MM in annual operating income improvements with a three year NPV of \$45 MM.

## **Summer 1995**

### **Polaris Industries, Minneapolis, MN**

MBA Marketing Internship

## **March 1991 – September 1994**

### **Steelcase Inc., Grand Rapids, MI**

Product Engineering and Dealer Channel Development

## **Education**

## **June 1996**

### **University of Minnesota, Curtis L. Carlson School of Business, Minneapolis, MN**

Masters of Business Administration, Marketing and Strategy

## **February 1991**

### **Michigan State University, East Lansing, MI**

Bachelors of Science, Mechanical Engineering

# Appendix E: Sample cover, networking and thank you letters



## Sample cover letter

**Mollie Smith**  
123 Mickey Mouse Drive  
Orlando, Florida 55555  
City, ST 00000-0000  
USA

Tel.: +1 555 555 5555 (hm)  
Cell: +1 111 111 1111  
[molliesmith@email.com](mailto:molliesmith@email.com)

June 9, 2004

Mr. Ron Taylor  
Director of Recruiting  
McDonald's Corporation  
1234 Butterfield Road  
Tampa, Florida 12345

Dear Mr. Taylor:

I am very interested in the Regional Recruiter position #X57624H, listed on the Society for Human Resources Management website. Enclosed is a copy of my resume for your review. I have been following McDonald's recent growth strategy and believe I can contribute significant value in staffing your newly acquired line of business. I bring to the position the following key elements:

- Experience in both private industry and public accounting, providing me with first-hand knowledge and understanding of your preferred recruiting pool.
- Start-up recruiting experience as the lead in sourcing, interviewing, selecting and training over 50 candidates for Disney World's new Tampa theme park.
- Development and enhancement of the mentoring program at Disney World and Disney Land, to train and increase retention of new employees at recently opened locations.
- Responsibility for developing the human resource recruiting budgets for five Disney Land locations and aligning those budgets to corporate human resources strategies.

My experience and skills have prepared me well for this exciting Regional Recruiter role. I will contact you next week to further discuss my interest and fit for the position. Please also feel free to contact me at either of the numbers listed above at your convenience. I look forward to talking to you

Sincerely,

Mollie Smith

## Sample cover letter

**John Donnelly**  
5 Birchtree Lane  
New York, NY 12121

Tel.: +1 212 852 5658 (hm)  
Cell: +1 212 555 5975  
[john@mye-mail.com](mailto:john@mye-mail.com)

March 8, 2004

Jack Smith  
Human Resources Manager  
Acme Products  
123 Post Road  
Boston, MA 01816

Dear Mr. Smith:

Please accept my enclosed resume for the Account Manager position as listed on Net-Temps. I've been following Acme Products in the news for some time and I'm excited about this opportunity.

In my previous position at Internet Store, I continually proved myself to be a superior account manager with the ability to work with customers for their overall satisfaction, as well as developing smaller accounts into larger ones. This involved great negotiation and communication between Internet Store and the customer.

This experience, as well as my organization and communication skills makes me the perfect candidate for this position.

Thank you for your time and consideration. I will be in the Boston area from April 12th through 21st and would like an opportunity to speak further. Please feel free to contact me on my cell phone at (212) 555 – 5975 or e-mail me at [john@mye-mail.com](mailto:john@mye-mail.com). I will contact your office within the next week to set up an appointment.

Sincerely,

John Donnelly

## Sample cover letter

**Rachel Macauley**  
123 Somewhere St – Anytown  
NJ 12345

Tel.: +1 123 456 7890  
[rmacaule@website.com](mailto:rmacaule@website.com)

July 16, 2004

Mr. Samuel Bend  
President and CEO  
Acme Products  
555 Post Rd.  
Trenton, NJ 25843

PERSONAL AND CONFIDENTIAL

Dear Mr. Bend:

A mutual friend who works at Acme Products, Jane Doe, mentioned there is an opening for the Vice President of Business Development. Please accept my resume for this position. After talking with Jane over the years about working at Acme Products and following the company in the trade news, this is the perfect next step for both my career and Acme Products.

During my tenure at Alpha Work, I successfully negotiated and created alliances with companies compatible with the strategy of Alpha Work as well as managed a team to assist in coordinating alliance information and facilitating the day-to-day activities.

Thank you for your time and consideration. I look forward to speaking with you further about this opportunity and will call over the next week to set up an appointment. Due to the sensitivity of my position here at Alpha Work, I'd appreciate it if you could keep my resume confidential for the time being. Thank you.

Sincerely,

Rachel Macauley

## Sample cover letter

**Joseph Milan**  
PO Box 678, Albany  
NY 20457

Tel.: +1 481 654 8858  
[jmilan@engineer.com](mailto:jmilan@engineer.com)

May 16, 2004

Sarah Waters  
Human Resources Recruiter  
HotterPlus.com  
25 South Wales St.  
Bennington, VT 58585

Dear Ms. Waters:

I am applying for the systems analyst position listed at the Andrews University Career Planning and Placement Services on March 11th. The position fits very well with my education, experience, and career interests.

With a major in management information systems, I have training on mainframes, minicomputers, and microcomputers as well as with a variety of software programs and applications. My practical experience in the university's computer center as a programmer and student consultant for system users gave me valuable exposure to complex computer operations. Additionally, I worked as a cooperative education student in computing operations for a large bank where I gained knowledge of financial systems. My enclosed resume provides more details on my qualifications.

My background and career goals match your job requirements well. I am confident that I can perform the job effectively. Furthermore, I am genuinely interested in the position and in working for HotterPlus.

Please consider my request for a personal interview to discuss further my qualifications and to learn more about this opportunity. I shall call you next week to see if a meeting can be arranged. Should you need to reach me, please feel free to call me at the number above. Thank you for your consideration. I look forward to talking with you.

Sincerely yours,

*Joseph Milan*

Joseph Milan

## Sample thank you letter

**Jane Doe**  
555 JANE WAY  
DOE CA 09876

Tel: +1 555.555.5555  
Fax: +1 444.444.4444

January 29, 2009

Robert Night  
9876 Star View Lane  
Comet, CA 01234

Dear Mr. Night:

I appreciate your time and consideration in interviewing me for the marketing manager position in the Marketing group of ABC Company. I enjoyed talking with everyone about how they view the department, each other, and the clients you serve. I spoke to several of you but the message was the same; quality professional service at all times. The obvious investment you make in your staff shows in the pride you take in each of them.

Please let me know if you have any questions, need my references, or recommendation letters. I would be happy to supply them to you. Thank you for allowing me to present my qualifications for this promising opportunity.

Sincerely,

Jane Doe

## Sample thank you letter

**Joan Archebault**  
87 Huntsville Rd  
Marquis, OH 88768

Tel: +1 747 897 7554

October 16, 2002

Mr. David Masterson  
Director of Technology  
Inventive Consulting Services  
777 Main St.  
Marquis, OH 88768

Dear Mr. Masterson,

Thank you for speaking with me about the Project Manager position at Inventive Consulting Services. After meeting you, seeing the company and learning more about the position, I am excited and convinced my skills and background will compliment each other perfectly.

In addition to my qualifications and experience, I will bring excellent work habits and judgment to this position. With the countless demands on your time, I am sure that you require people who can be trusted to carry out their responsibilities with minimal supervision.

Sincerely,

Joan Archebault

## Sample networking letter

Mary Rojas  
Director – Marketing Communications  
XYZ International  
1426 West 5th Street  
Los Angeles, CA, 94052

Dear Ms. Rojas,

I was referred to you by Diane Smithers from Acme International Marketing in New York. She recommended you as an excellent source of information on the communications industry.

My goal is to secure an entry-level position in communications. I would appreciate hearing your advice on career opportunities in the communications industry, on conducting an effective job search, and on how best to uncover job leads.

I look forward to contacting you early next week to set up a telephone informational interview. Thank you for your consideration.

Sincerely,

Anne Baxter

## Sample networking letter

Dear Mr. Brooks,

In researching ways in which people have made their marks in the field of physics, I cannot tell you how many times I have encountered your name in journals, newspaper articles, and textbooks. Your contribution has been truly stunning.

Now that I find myself in the position of seeking my own fate in the field, I wanted to ask if you could offer fifteen minutes of your time to discuss ways in which a neophyte such as myself can best forge a path of his own. I am currently a senior at M.I.T. specializing in the Acceleration Norms of Random Ratio Quantum Particles. I am scheduled to graduate with a 4.0 GPA in December of this year.

I will follow this letter with a call to the Institute to see if I can schedule an appointment. It would be an honor to speak to you.

Respectfully,

Anthony Simon



## Sample networking letter

February 1, 2003

Kimberly Sharpe, Recruiting Manager  
Hexagonal Consulting  
666 Avenue of the Americas, 13th Floor  
New York, NY

Dear Ms. Sharpe,

I am a first year MBA student at State Business School. I was extremely impressed with Hexagonal Consulting's approach to management consulting after attending the presentation given by your firm last quarter. I also had the opportunity to speak with William Field and several summer interns. My discussions with them confirmed my interest in Hexagonal Consulting. I am now writing to request an invitation to interview for a summer internship.

After graduating from Northern College with a degree in accounting, I worked as an associate in the Finance department of AutoCo, a well-known automotive manufacturer. I gained solid analytical and problem solving skills there. I was responsible for identifying and resolving financial reporting issues, as well as generating innovative methods to improve our processes. I also fine-tuned my communication and consensus building skills, as I often needed to present and market my work to middle and upper management. Finally, during my last year of employment, I took on a team leadership role, managing the daily work of five junior members of our team and taking an active role in our training for new hires.

I am excited by the strong potential fit I see with Hexagonal Consulting. I feel that the analytical, leadership and teamwork abilities gained through my employment and academic experience have provided me with the tools and skills necessary to perform well in a consulting career, and will allow me to make a significant contribution at your firm. I am particularly intrigued by the shareholder value focus of Hexagonal Consulting's methodology, since it fits well with my experience in finance.

I have enclosed my resume for your review. I welcome the opportunity to meet with you when you recruit at SBS for summer internships later this month, and I would greatly appreciate being included on your invitational list.

Thank you for your time and consideration. I look forward to hearing from you.

Sincerely,

Lisa Haley  
314 Broadway  
New York, NY 10007

# Appendix F: Sample interview questions

## General (non-behavioral) interview questions

### From Deloitte national alumni relations – Interview preparation and questions

- Always think about why the question is being asked. What does the employer REALLY want to know? Also see the Top 10 Most Frequently Asked questions in the Interviewing section.
- Tell me about yourself. Keep it brief. Touch on three areas: Education, Work Experience and your Current situation.
- What are your short-term (1-3 years) and long-term (3-10 years) goals?
- How have you kept current in your field? Refer to CPE training, Deloitte training, “on-the-job-training.”
- Why do you feel you will be successful in this work? Be prepared to define success and explain how successful you have been in your career.
- What do you think you will be looking for in the job following this position?
- Describe your ideal job. Mention that this job and this company are very close to what best suits you at this point in your career.
- What other types of jobs are you looking for in addition to this one? Do not mention specific companies you are interviewing with, unless it enhances your position. Just describe the jobs.
- Why do you want to work for us? You would like to be part of a company project, solve a company problem. You like what you have learned about the company, its policies, goals and management.
- What experience have you had working on a team? Mention a very positive experience where you might have been the team leader.
- What have been your most satisfying/disappointing experiences? Emphasize the satisfying experiences.
- What were your most significant accomplishments in your last position and in your career thus far? Be prepared with a list of accomplishments statements that you have committed to memory.
- What do you think are your strengths/weaknesses? What would your previous boss say are your greatest strengths and weaknesses? Be consistent with what you think your boss would say as a reference. Position your weakness in a positive tone. Be prepared to describe at least three strengths along with examples of how you have demonstrated them.
- How would your peers describe you? Be honest. The company may call the peers as references and ask them to describe you.
- What kinds of problems do you handle the best? Analytical, people/management, political, time pressures, or organizational.
- How would you describe your personality? Keep it brief and relevant to the position and the organization’s culture.
- How do you reduce stress and try to achieve balance in your life?
- Why did you apply to our organization and what do you know about us? In your answer, highlight products, services, revenues, problems, people and history. Tell the interviewer that you would like to know more from his/her point of view, but ask if there is time for that at this point in the interview. It is to your disadvantage to have the interviewer talk at length about the organization if your time to sell yourself is limited.
- Describe what would be an ideal working environment. Refer to your ideal job and relate them to that particular company.

- What do you think are advantages/disadvantages of joining our organization?
- What is the most important thing you are looking for in an employer? Commitment to people, stability, market share, reputation, leadership style, or entrepreneurial bent, small, intimate, creative environment.
- Why are you leaving your present job? Do not personalize. Never be negative. Keep it short. When possible, give a “group” answer (“There is an office reduction taking place because of the economy and the whole organization is being reduced in size.”) Stick to one response. Do not change answers during the interview.
- How would you evaluate your present firm? Be positive. Refer to the valuable experience you gained.
- What were some of the common characteristics of your past supervisors? Emphasize the positive. That is how people learn to be good managers. Or, if one was disorganized, mention it in a manner that emphasizes your strong organizational abilities.
- What characteristics do you think a person would need to have to work effectively in our company with its policies of staying ahead of the competition? Flexibility, strong work ethic, research/analytical strengths, self-starter, highly intelligent, technologically savvy, creative.
- What courses in school did you like best/least? Why? Emphasize your best and favorite subjects. If grades were average, talk about leadership activities or jobs you took to finance your education.
- What are your plans for further studies?
- How do you feel about supervising other people? Be honest. If you do not want to supervise, emphasize that you can contribute more as an individual player. If you want to supervise, say so and be enthusiastic.
- Why do you want to supervise people? To grow and develop professionally, to help others develop, to build a team, and to share what I have learned.
- What supervisory or leadership roles have you had? Give an example of why you feel you have management potential. Draw from your successes. “Because I have been told that I have management potential during evaluations; because I know what skills are necessary to be a manager and I know I have them. I have had excellent managers and I can draw from that experience.
- What do you see as the most difficult task in being a supervisor? Getting things planned and done through others.
- What frustrates you the most?
- When were you last angry at work and what was the outcome?
- What things could you do to increase your overall effectiveness?
- What was the toughest decision you had to make in the last year? Why was it difficult?
- Why should we hire you?
- What was the last book you read? Movie you saw? Sporting event you attended? Think this through ahead of time. Select one of the books you have read that match the company culture.

## Sample behavioral based interviewing questions

### From Deloitte national alumni relations – Interview preparation and questions

- Describe a situation in which you were able to use persuasion to successfully convince someone to see things your way.
- Summarize a situation where you took the initiative to get others going on an important issue, and played a leading role to achieve the results wanted.
- Describe an instance when you had to think on your feet to extricate yourself from a difficult situation.
- Describe a few situations in which your work was criticized.
- What was the most complex assignment you have had? What was your role?
- Provide an example of how you acquired a technical skill and converted it into a practical application.
- Give me an example of a time when you were able to successfully communicate with another person even when that individual may not have personally liked you.

- Describe a creative/innovative idea that you produced which led to a significant contribution to the success of an activity or project.
- Give me a specific example of a time when you used good judgment and logic in solving a problem.
- Describe a situation that required a number of things to be done at the same time. How did you handle it? What was the result?
- Give me an example of an important goal, which you had set in the past and tell me about your success in reaching it.
- Give an example of when you had to work with someone who was difficult to get along with. Why was this person difficult? How did you handle that person?
- Describe a problem situation where you had to seek out relevant information, define key issues, and decide on which steps to take to get desired results.
- In your present position, what problems have you identified that had previously been overlooked?
- We can sometimes identify a small problem and fix it before it becomes a major problem. Give an example of how you have done this.
- Tell me about a time when you had to go above and beyond the call of duty in order to get a job done.
- Tell me about a time in which you had to use your written communication skills in order to get an important point across.
- Describe the most significant or creative presentation, which you have had to complete.
- Give me a specific occasion in which you conformed to a policy with which you did not agree.
- Describe a time on any job that you held in which you were faced with problems or stresses that tested your coping skills.
- By providing examples, convince me that you can adapt to a wide variety of people, situations and environments.
- Give an example of a time in which you had to be relatively quick in coming to a decision.
- Tell me about a time when you had to go beyond what is ordinarily expected of an employee in order to get a job done.
- Give an example of an important goal you set and describe your success in reaching it.
- Discuss occasions when you adapted to a wide variety of people and situations.

# Appendix G: Networking tool

## 3 Minutes – 30 Colleagues

	Name	Phone	Company	Professional Interests
Relatives	1.			
and	2.			
Friends	3.			
Former	4.			
Colleagues	5.			
	6.			
Employees of Clients or	7.			
Places Where	8.			
You Do Business	9.			
Spouse's and	10.			
Friends	11.			
Coworkers	12.			
Contacts identified on LinkedIn, Spoke, etc. employed at key companies	13.			
	14.			
	15.			
Neighbors and Contacts through children like Scouts, sports	16.			
	17.			
	18.			
Individuals met at training, conferences	19.			

	Name	Phone	Company	Professional Interests
	20.			
	21.			
Professional Organization	22.			
Associations	23.			
	24.			
Personal Clubs/Religious	25.			
Associations	26.			
	27.			
Former Classmates	28.			
	29.			
	30.			

# Appendix H: Job offer evaluation tool

## Job offer evaluation tool

Create a job offer evaluation tool in these three simple steps:

- Create a spreadsheet with the company names across the top and your values from ValueBase listed down the left hand side (or use a copy of the blank worksheet on the next page).
- Under each company’s name assign a score from 1 to 5 for each of the items in your values/needs list.
- Total the columns and compare overall scores.

This approach allows you to see how your priorities affect your decision. You do not necessarily have to accept the offer with the highest score. The purpose of evaluating the job offers in this manner is to understand how your values and needs are addressed by each position and then being able to make a decision with your eyes open to the trade-offs you may be faced with making. There are always variables that cannot be predicted when accepting an offer, but using an analytical approach can make the decision more objective.

## Job offer evaluation tool

Company Name			
Values	1.	2.	3.
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
Total Score			

## Sample completed job offer evaluation tool

Values	Company Name		
	1. Acme	2. ABC, Inc.	3.
1. <b>Security and Stability:</b> Laid off twice in the past five years, and looking for a home with a solid company.	5 Seems very stable	2 New division, not sure about future	
2. <b>Personal, Family and Work/Life Balance:</b> A top personal value is family. Worked over 60 hours each week in last job. Not eager to get back into that work frenzy again.	3 55 hour work weeks are standard	5 40-45 hour work weeks are common	
3. <b>Meaningful Work, Make a Contribution:</b> Want to feel work means something in the bigger picture and that I am contributing and making a difference.	2 Job seems more routine	4 Would be helping to grow new division	
4. <b>Location:</b> Goes hand-in-hand with balance. If I have to spend two to three hours a day commuting, it means time spent away from my family.	1 1 hour commute each way	5 5-10 minute drive from home	
5. <b>Salary and Benefits:</b> Important, but not as important as the other values. I want to be paid what I am worth, but would be willing to negotiate to get some of my other needs met.	4 \$80K w/good benefits, no bonus	4 \$77K w/great cafeteria plan and bonus potential	
6.			
7.			
8.			
9.			
10.			
<b>Total Score</b>	<b>15</b>	<b>20</b>	



# Appendix I: Recommended book list

## Career and self-development

- Do What You Are (P. Tieger, B. Barron-Tieger)
- Firing Back: How Great Leaders Rebound After Career Disasters (J. Sonnenfeld, A. Ward)
- Now, Discover Your Strengths (M. Buckingham, D. Clifton)
- Now What? 90 Days to a New Life Direction (L. Berman Fortgang)
- Passion at Work (L. Kang)
- 10 Insider Secrets – Career Transition – Your Complete Guide to Discovering your Ideal Job (T. Bermont)
- The Alchemist: A Fable About Following Your Dream (P. Coelho)
- The Confidence Plan: How to Build a Stronger You (T. Ursiny)
- The Renaissance Soul: Life Design for People with Too Many Passions to Pick Just One (M. Lobenstine)
- The Rules of Life (S. Templar)
- What Color is Your Parachute? (R. Bolles)
- What is Your Life's Work?: Answer the Big Question about What Really Matters...and Reawaken the Passion for What You Do (B. Jensen)
- What Should I Do with My Life?: The True Story of People Who Answered the Ultimate Question (P. Bronson)
- Who Moved My Cheese? (S. Johnson)

## Job search guides

- Job Hunting and Career Change All-in-one For Dummies (R. Yeung)
- Knock 'em Dead: The Ultimate Job Seekers Guide (M. Yate)
- Negotiating your Salary: How to Make \$1000 a Minute (J. Chapman)
- Rites of Passage at \$100,000 to \$1 Million+ – Your Insider's Guide to Executive Job Changing and Faster Career Progression in the 21st Century (J. Lucht)
- The Unwritten Rules of Highly Effective Job Search (O. Pierson)

## Networking

- Brag! The Art of Tooting your Own Horn without Blowing it! (P. Klaus)
- People Power: 12 Power Principles to Enrich Your Business Career and Personal Networks (D. Fisher)
- Power Networking: 59 Secrets for Personal and Professional Success (D. Fisher)

## Resumes

- Resumes for Dummies (J. Kennedy)
- Resumes That Knock 'em Dead (M. Yate)

## Cover letters

- Cover Letters For Dummies (J. Kennedy)
- Cover Letters That Knock 'em Dead (M. Yate)

## Interviewing

- 101 Great Answers To the Toughest Interview Questions (R. Fry)
- Job Interviews For Dummies (J. Kennedy)
- Sweaty Palms (H. Medley)

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