

# STRATEGIC CAREER PLANNING WORKSHOP

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PRESENTED BY

**JACOB GALECKI**  
MANAGING PRINCIPAL



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**THE CASUALTY ACTUARIAL SOCIETY IS COMMITTED TO ADHERING STRICTLY TO THE LETTER AND SPIRIT OF THE ANTITRUST LAWS. SEMINARS CONDUCTED UNDER THE AUSPICES OF THE CAS ARE DESIGNED SOLELY TO PROVIDE A FORUM FOR THE EXPRESSION OF VARIOUS POINTS OF VIEW ON TOPICS DESCRIBED IN THE PROGRAMS OR AGENDAS FOR SUCH MEETINGS.**

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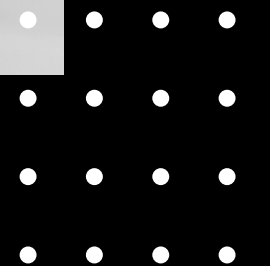


# JACOB GALECKI

## MANAGING PRINCIPAL


GALECKI SEARCH ASSOCIATES

ACTUARIAL SCIENCE MAJOR, TEMPLE UNIVERSITY  
STARTED CAREER IN RETIREMENT ACTUARIAL  
BEGAN RECRUITING CAREER IN 2010  
IN-HOUSE RECRUITER AT LIBERTY MUTUAL  
FOUNDED GALECKI SEARCH IN 2018





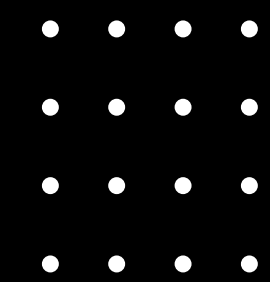
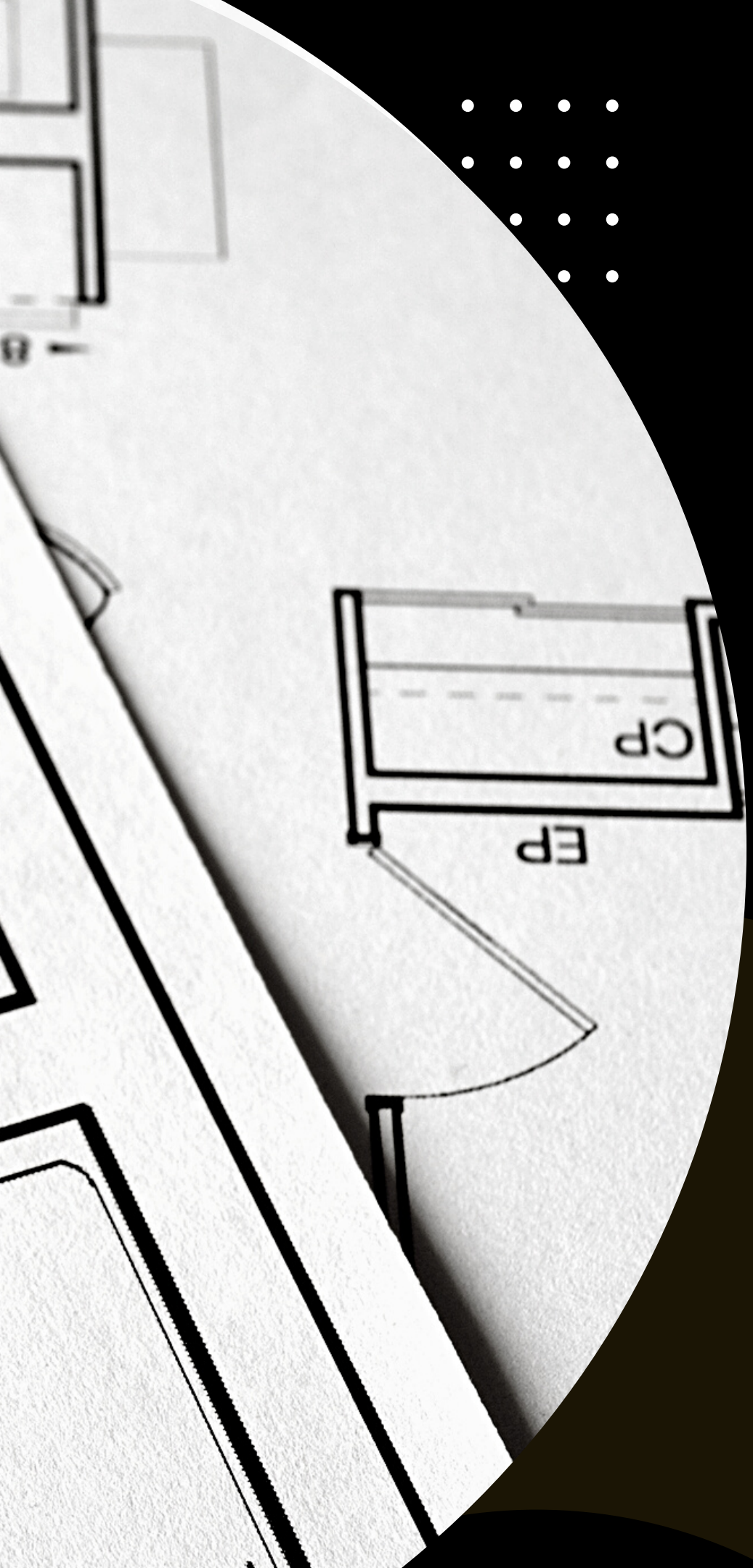
# NOTE ON DELIVERY

- This is a working session
  - There will be approximately 28 minutes of content, the balance will be working time
  - There will be no Q&A at the end, so please ask questions by raising your hand during the working sessions
  - You will likely not leave with a fully completed version, but the workshop should get you most of the way there
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# THE STRATEGIC PLANNING PROCESS



# PLANNING PROCESS OVERVIEW



**1**

**GRAND PLAN**

**2**

**3-YEAR VISION**

**3**

**INITIATIVES**

**4**

**ANNUAL GOALS**

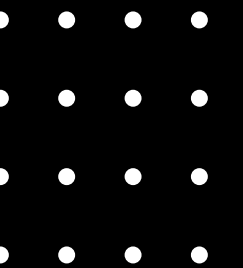
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**DAILY ACTION**



# STEP 1

START WITH THE  
END IN MIND





**YOU CAN'T GET TO WHERE YOU WANT TO BE  
UNLESS YOU KNOW YOUR DESTINATION.**





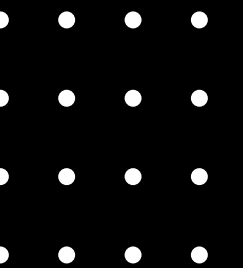
SEEING THE DISTANT FUTURE IS HARD





# STEP 2

# YOUR 3-YEAR VISION





## 3-YEAR VISION

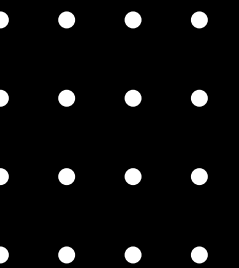
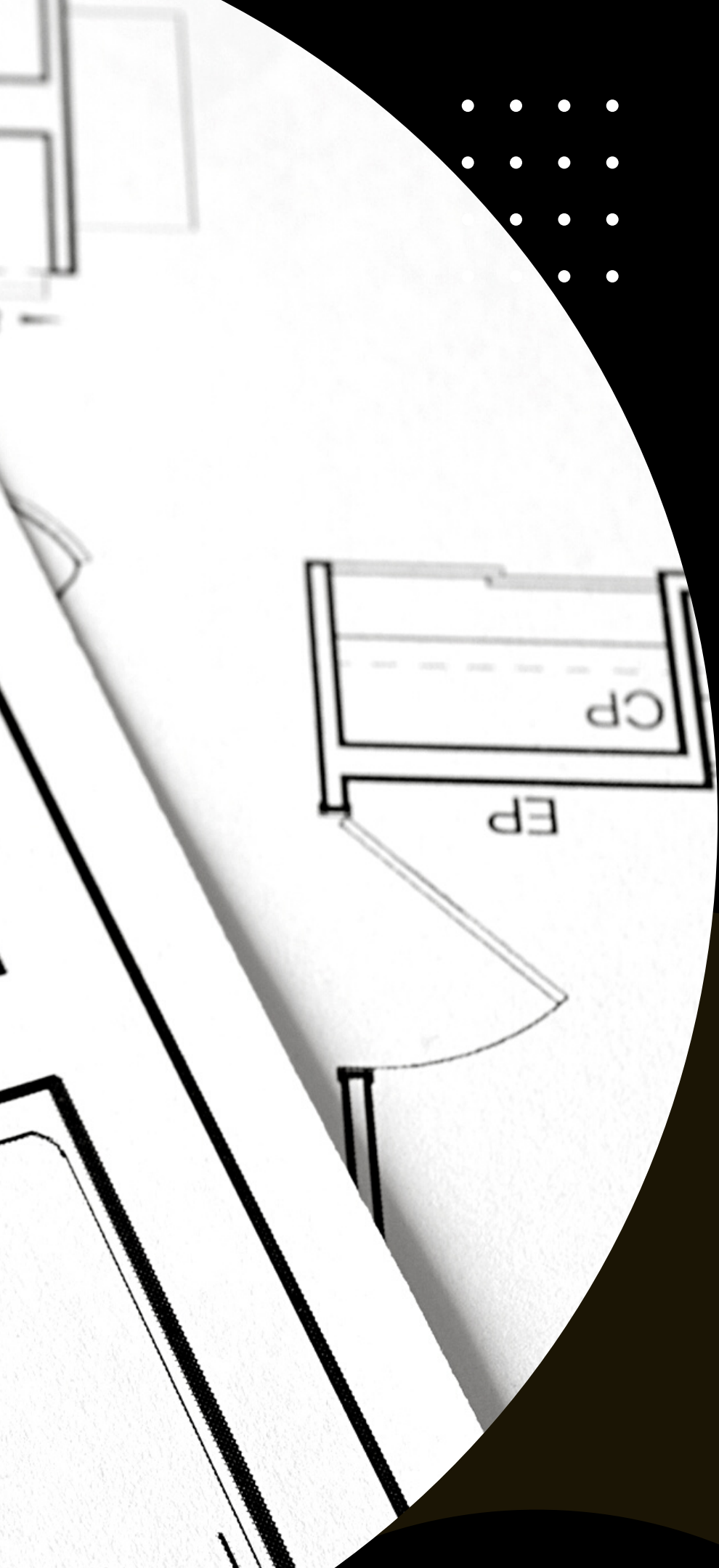
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THE NEAR FUTURE IS EASIER TO SEE

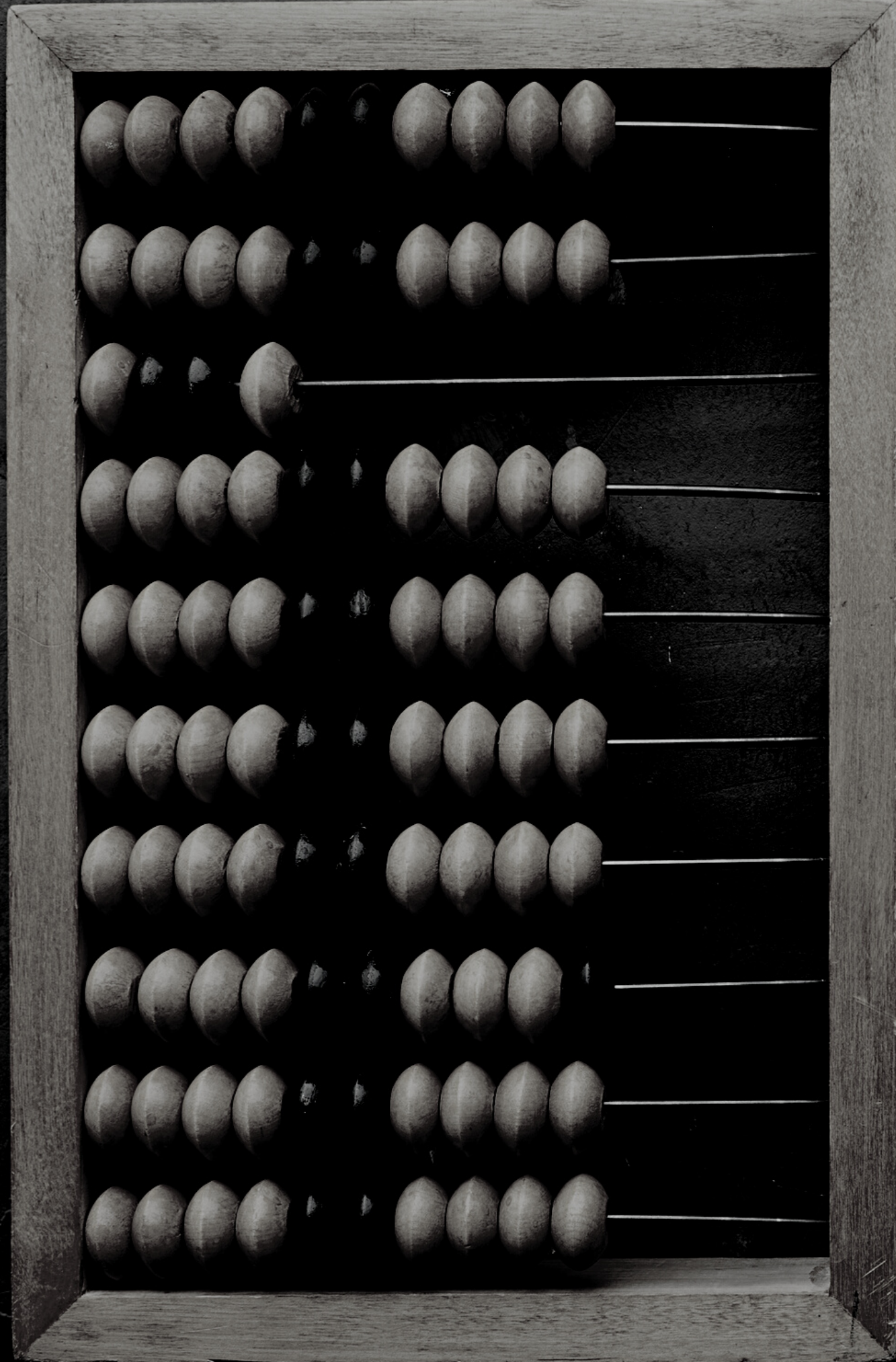




# CAREER ACCOUNTS







## **CAREER ACCOUNTS**

1. TECHNICAL
2. MANAGERIAL
3. PERSONAL
4. FINANCIAL





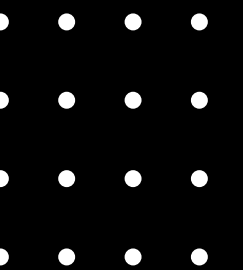


**FOCUS IS KEY**

You can't focus on everything

# STEP 3

SET STRATEGIC  
INITIATIVES FOR  
YEAR AHEAD





INITIATIVES SPECIFY THE PROGRESS YOU  
WILL MAKE IN THE YEAR AHEAD

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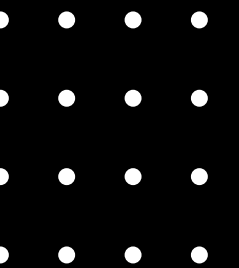
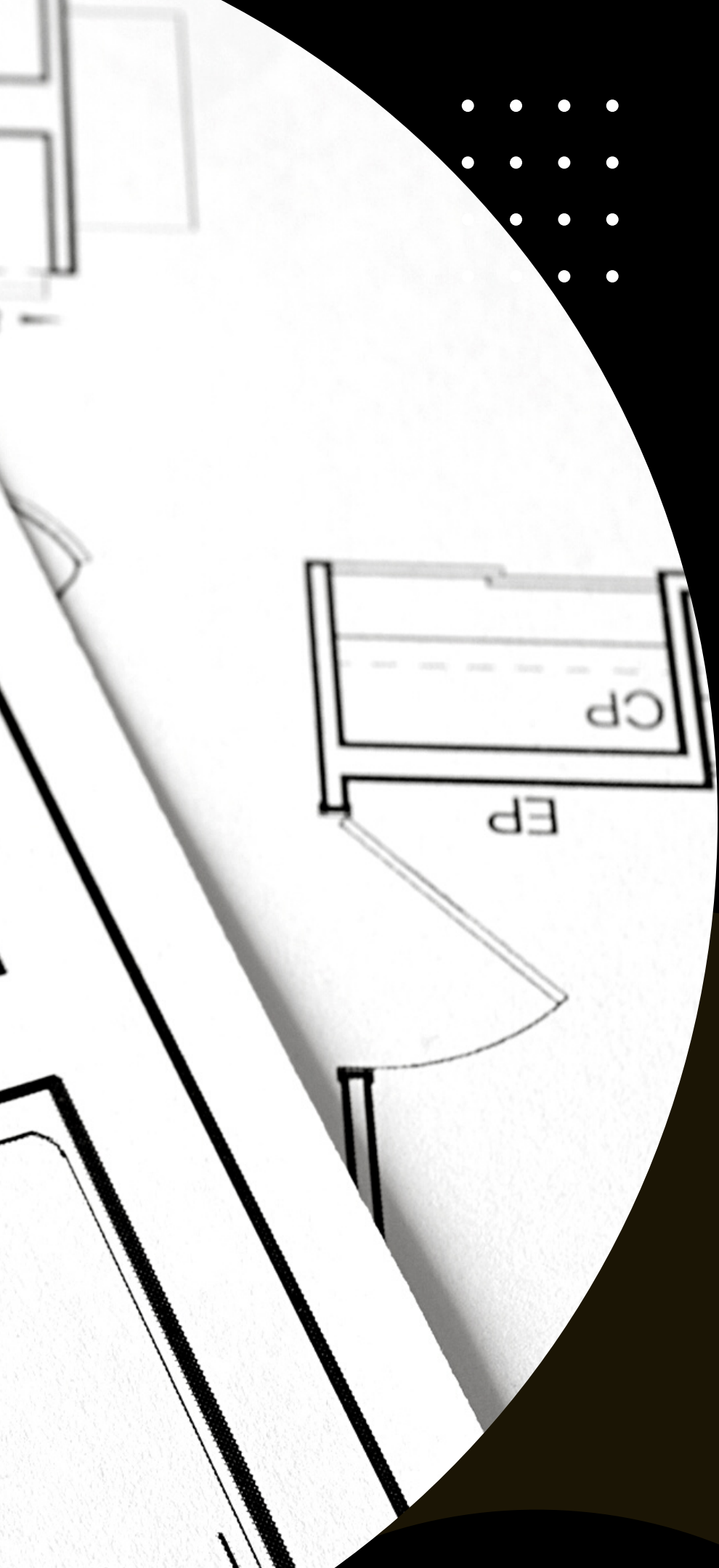
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# STEP 4

# GOAL SETTING



# Good goals are...

Specific

S

M

Achievable

A

R

Timely

T

Measurable

realistic



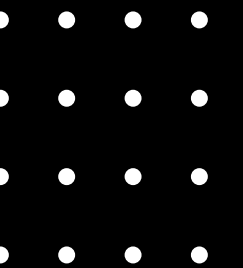
**YOU WILL SET GOALS TO ADVANCE YOUR INITIATIVES IN THE YEAR AHEAD**





# EXERCISE 1

START WITH THE  
END IN MIND







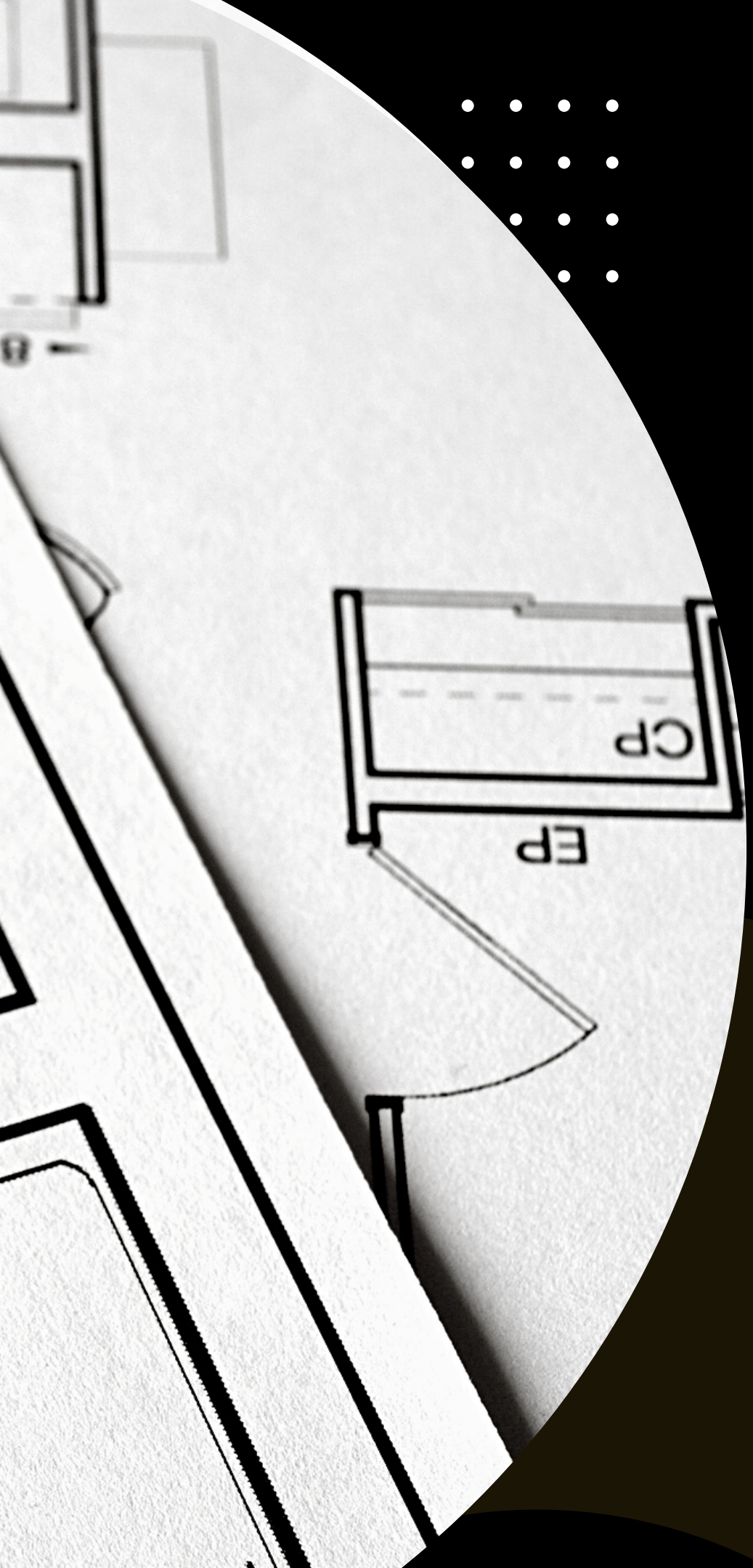
Step into the future, you're at your retirement party.

**Questions:**

What role are you retiring from?  
What were your key accomplishments?  
What are people saying?

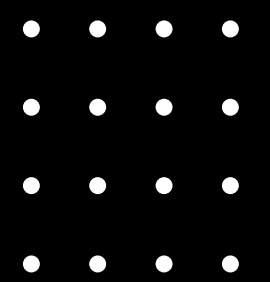
This is the time to **DREAM**





# EXERCISE 2

## YOUR 3-YEAR VISION







**CHOOSE 3 CAREER ACCOUNTS THAT ARE  
IMPORTANT TO YOU**



**1**

**TECHNICAL**

**2**

**MANAGERIAL**

**3**

**PERSONAL**

**4**

**FINANCIAL**







# VISION FOR EACH ACCOUNT



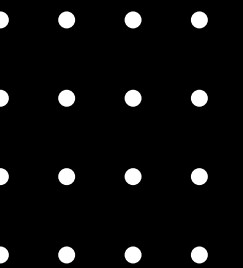
- 1** ACCOUNT NAME?
  - 2** WHY IS IT IMPORTANT?
  - 3** ENVISIONED FUTURE?
  - 4** CURRENT REALITY?
  - 5** SPECIFIC COMMENTS
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# EXERCISE 3


SET STRATEGIC  
INITIATIVES FOR  
YEAR AHEAD







# SET TWO INITIATIVES

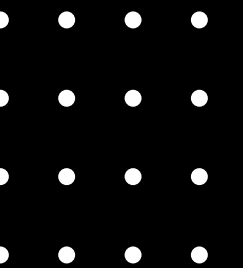
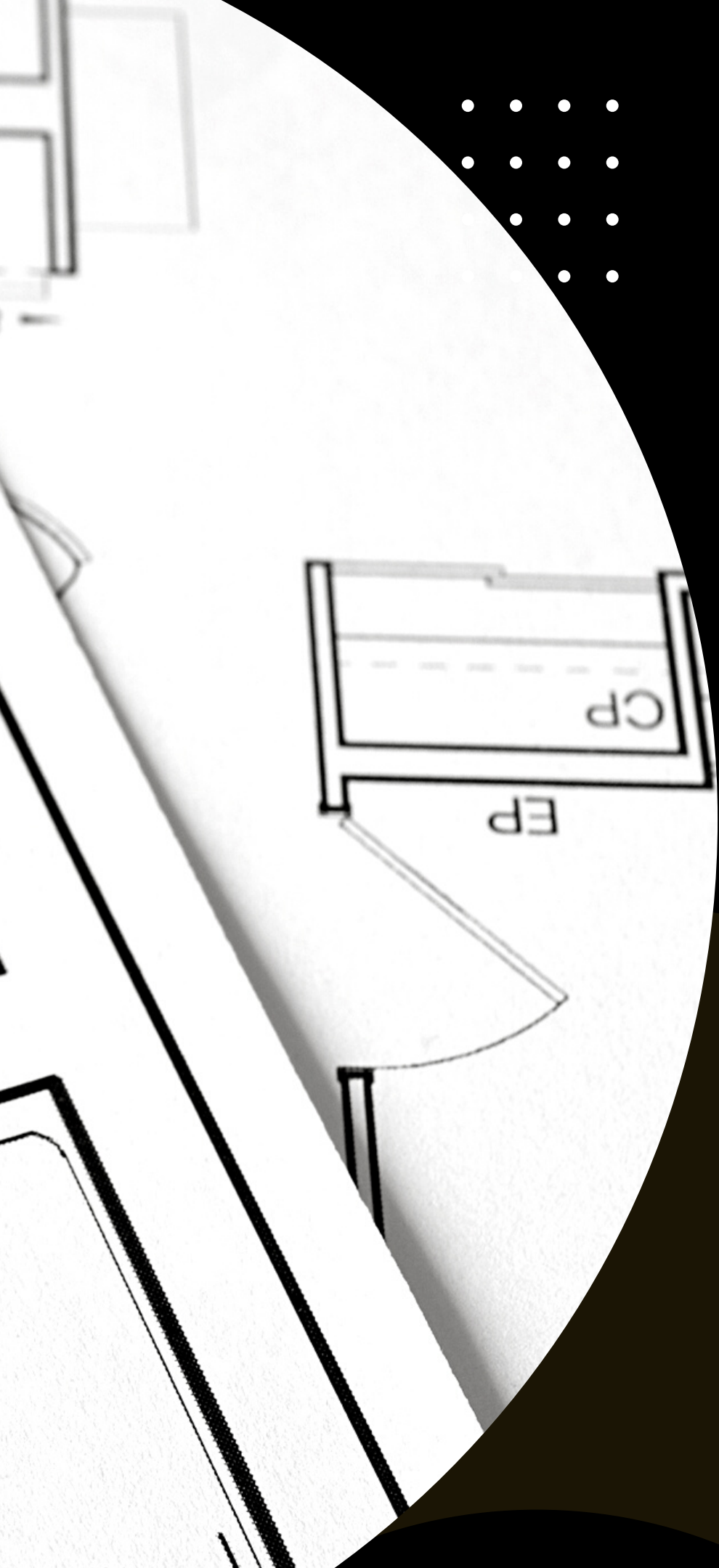
- Initiatives specify the progress you will make over the next year
  - Initiatives are NOT goals, initiatives are short & memorable
  - Questions to ask yourself:
    - How much progress will you make on your 3-year vision this year?
    - What is the first step?
    - What is one thing you can do to make everything else easier?
    - What can you accomplish this year?
  - Examples:
    - Improve Technical Skills
    - Get Managerial Experience
    - Deepen my understanding of various reserving techniques
- 





# EXERCISE 4

# GOAL SETTING







# GOAL SETTING FOR INITIATIVES

Good goals are **S.M.A.R.T.** goals

S – Specific

M – Measurable

A – Action Oriented / Achievable

R – Realistic / Relevant

T – Time Keyed







**THANK  
YOU**



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