

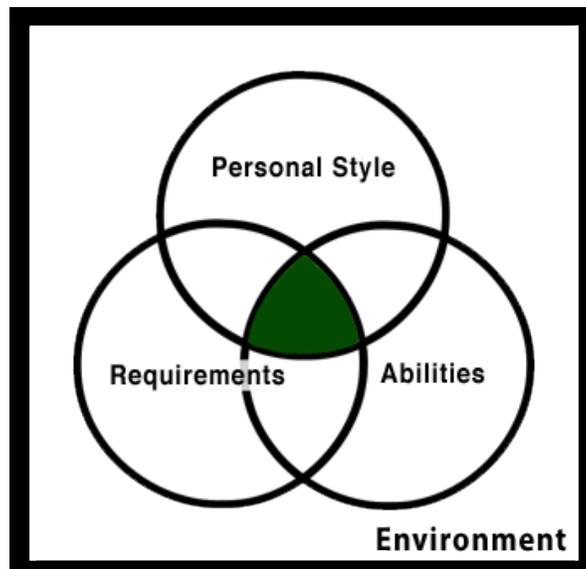
Charting Your Course and Advancing Your Career

My Career Profile is a savable pdf form that you can use to match your personal preferences and strengths to key industry jobs featured in the [Explore Job Profiles](#) section of the [My Career Advancement](#) (MCA) website.

Your profile contains eight steps to help you assess your:

- **Personal Style**—personality and values
- **Abilities**—skills and knowledge
- **Requirements**—compensation/benefits and career path preferences
- **Environment**—where, when, and with whom you prefer to work

Working through the profile exercises will assist you in evaluating the fit of potential jobs and in finding ways to develop and enrich your present position.



Personal Style

Personal Style refers to your preferred patterns of behaving and relating to the world. Personal Style is formed through years of life experiences and is durable and slow to change. Because of this fact, a tried-and-true career selection and development approach is to start by discovering your Personal Style and then identifying jobs that require the elements of Personal Style (personality and values) that most closely match yours.

If your main focus is career development, knowing your Personal Style will help you to access your strengths and become aware of your potential blind spots to speed your learning.

Step 1: Assess Your Personality

Personality is the combination of patterns of thoughts, emotions, and behaviors that are characteristic of a person. Some aspects of personality are inborn (nature) and other aspects are learned (nurture). While personality can change, it tends to be quite stable and very slow and difficult to change. Psychologists have found that those who share similar personality profiles are often drawn to the same type of work.

No single personality assessment will likely predict whether or not you will be successful in a particular career. However, assessments are helpful for pinpointing your strongest behavioral preferences and suggesting jobs/careers that you could find to be enjoyable.

Try taking several personality assessments (see the Additional Assessment Sources on page 21) and note the common themes that seem to best describe you. Then compare your profile with those jobs that most interest you from the [Explore Job Profiles](#) section of the website.

Please start this section by taking a free online assessment of your personality that is based on the career choice theory of the late American psychologist, John L. Holland. Because Holland's model combines personality theory and occupation choice, it is commonly used by career counselors throughout the United States, especially in college career centers.

When you reach the end of the assessment, you will receive a numerical score for six personality factors. **Please type your scores in the boxes below.**

[CLICK HERE TO TAKE THE ASSESSMENT](#)

After filling in your scores, rank them using the drop-down menu 1-6, with 1 being the highest score and 6 the lowest. Then type your top 4 trait letters in the box below, in order of highest to lowest. The trait descriptions are on the next page.

<u>Trait Name</u>	<u>Score</u>	<u>Rank (1-6)</u>
(R) ealistic		
(I) nvestigative		
(A) rtistic		
(S) ocial		
(E) nterprising		
(C) onventional		

Type your 4-letter trait code (ECSI, for example, where E is the highest score and I the lowest.)

Trait Descriptions

The following is a set of trait descriptions that correspond with the code that you just generated. Your code is organized by intensity of trait (behavioral preferences). Our example 4 letter code was ECIS, which means (E)nterprising, (C)onventional, (S)ocial, (I)nvestigative; in other words, this person's (E)nterprising trait is the strongest preference followed by (C)onventional. How well does your code describe your preferences?

(R) ealistic

- May possess fine motor coordination and physical strength
- Work through problems by physically doing something, rather than just talking or thinking
- Prefer concrete problem solving approaches, rather than abstractions
- Like scientific or mechanical things, opposed to culture and aesthetics
- Prefer working with physical things

(I) nvestigative

- Prefer thinking and observing over action
- Like organizing and understanding information rather than working to persuade others
- Prefer individual activities over social activities
- Enjoy working with data

(A) rtistic

- Consider themselves to be creative and open to new experiences
- Emotional, independent, perceptive, and sensitive
- Dislike rules and structure
- Prefer tasks involving people or physical skills
- Like to work with ideas and things

(S) ocial

- Enjoy teaching or helping
- Seek close, harmonious relationships with others
- Do not prefer being intellectual or physical
- Prefer to work with people

(E) nterprising

- Value reputation, status, power and money
- Use their verbal skills to lead and persuade others
- Enjoy working with people and data

(C) onventional

- Prefer procedures, processes, and rules
- Tend to have good self-control
- Like structure and order at work
- Dislike unstructured or ambiguous work and interpersonal situations
- Value/respect reputation, power, and status
- Enjoy working with data

Step 2: Identify and Review Jobs Most Closely Matching Your Personality

Most of the insurance and risk management industry jobs profiled on www.mycareeradvancement.com have two personality traits in common: Enterprising (**E**) and Conventional (**C**), which means that most industry jobs tend to involve an interest in commerce and require a balanced concern for people and data.

The least common code in the industry is Artistic (**A**). Strong A's are likely to be in advertising, graphic design, marketing groups of larger insurance businesses, or as business owners and innovators.

If Enterprising or Conventional were not in your top four, this does not mean you will not be successful in the industry. Consider exploring the upside and downside implications of a mismatch in different job environments. It may be that a mismatch provides a unique advantage with a certain aspect of your job. For example, if you had an ASER profile and were selling small business insurance policies to art gallery owners, your personality may be perfect for developing strong rapport with clients who are interested in art.

Below, check the box next to the job that most closely matches your 4-letter code and follow the links to the [Explore Job Profiles](#) section of the website to read the related job profiles. Note that job analysts have not found it necessary to give all jobs below 4-letter codes; they have selected only the traits most likely to have the strongest influence on that particular job. Pay particular attention to the order of code letters. The first few are the strongest.

[Clerical/Operations](#)

CE–Processing Clerk

[Account Service](#)

ECS–Account Manager/Customer Service Representative

[Marketing/Sales](#)

ECS–Marketing Specialist

ES–Insurance Producer (agent/broker)

ES–Agency Relationship Managers (Insurance Company Representative)

[Technical and Specialist](#)

ECS–Underwriter

ICER–Claims Adjuster

ECI–Risk Analyst/Risk Manager

[Management](#)

EC–Sales Manager

ECIS–Department Manager

ECIR–Risk Manager

CEIS–School Risk Manager

[Business Owner](#)

ESA–Agency/Business/Company Owner

Which jobs seem to be the best personality match for you?

Step 3: Inventory Your Values/Motivation

Rate each value/motivation as either **Not Important**, **Nice to Have**, or **Must Have** in order to really feel motivated and enjoy your work. This analysis will be helpful when you are evaluating a prospective position or needing to pinpoint what you could do to enhance a present job or make your work more enjoyable, meaningful, or motivating.

	Not Important	Nice to Have	Must Have
A sense of accomplishment from my work			
Opportunity to use my strengths			
Work independently			
Plan my own day			
Career advancement opportunities			
Opportunity to guide, mentor, or instruct employees			
Recognition for my work			
Able to assist/help others			
Lots of social interaction with clients and/or coworkers			
Not feel pressured to go against my sense of right and wrong (assuming the request is legal)			
Feeling like my work is helpful to individuals and society			
Supportive management			
Access to effective training			
Friendly competition in the workplace			
Maintain a fast pace			
Lots of job variety (different tasks, customers, etc.)			
Work at a comfortable, steady pace			
Stable employment (little turnover and few layoffs)			
Feel that I am doing something meaningful			
High quality standards for me and my colleagues			

Step 4: Assess Your Present Abilities (Skills and Knowledge)

Ability is our capacity or power to do something. The major elements of ability are skills and knowledge that combine with Personal Style to create competent job performance. Unlike Personal Style, the elements of ability can be changed relatively easily through deliberate practice.

The way to determine whether someone possesses a skill or knowledge is through testing. Skill tests measure how well (accurately, completely, etc.) a person can perform a specific behavior under specified testing conditions. Knowledge tests reveal a person's ability to correctly recall from memory and apply facts, procedures, concepts, processes, and principles.

Please consider that we may possess an ability but not enjoy using it. For example, have you ever known someone who was a skilled musician, spent years practicing in childhood, and no longer enjoys making music as an adult? Just because you can, does not mean you want to. The opposite is also true: just because you really want to does not mean that you can.

Pinpoint Your Skills and Development Prospects

Use the following skillset checklists to identify your best skills and those you are most interested in developing. Check the **Like and Skilled** box if the skill/knowledge named is one you are able to do and like. Check the **Like and Unskilled** box if you are interested in learning to use that skill but are not yet skilled. Finally, If you really would not prefer to use that particular skill, select **Don't Like**. Be selective! There is no right score for this inventory. The skills you checked as **Like and Unskilled** are good candidates for your development efforts.

BUSINESS ACUMEN

	Like and Skilled	Like and Unskilled	Don't Like
I know what a balance sheet communicates.			
I can name the top businesses and/or leaders in the industry and read industry news daily.			
I understand how financial data are used to make business decisions.			
I am able to quickly learn how a business works.			
I understand the basics of business and feel comfortable talking with people about their businesses.			
I understand the key drivers of our business and how to improve profitability.			
I can gather data and produce meaningful business reports.			
I can name our chief competitors and what differentiates us from them.			

COMPUTER/INFORMATION MANAGEMENT

	Like and Skilled	Like and Unskilled	Don't Like
I can perform physical repairs on computers.			
I am proficient in one or more computer programming languages.			
I am able to build a database from scratch using a Database Management System (DBMS).			
I am able to write reports from databases using reporting tools.			
I have used an Agency Management System (AMS) or Risk Management Information System (RMIS).			
I am able to create email templates and manage mailing lists.			
I can create presentations using multi-media software.			
I know how to use at least one type of Customer Relationship Management (CRM) software.			

COMMUNICATION

	Like and Skilled	Like and Unskilled	Don't Like
I can explain complex things clearly and simply.			
I am able to describe business challenges and compellingly communicate through presentations.			
I am a good public speaker who can engage an audience.			
I am able to generate and ask effective questions.			
I'm able to write simply and clearly.			
I have a good command of English spelling and grammar.			
I routinely check understanding with others to make sure I have understood their communication.			
I am comfortable communicating with all levels of management.			

IDEA GENERATION AND EVALUATION

	Like and Skilled	Like and Unskilled	Don't Like
I am good at generating novel ideas or approaches.			
I can lead a group in a productive brainstorming session.			
I can analyze an idea and break it down into its key components.			
I am good at identifying and connecting similar ideas.			
I can develop evaluation criteria for an idea and determine its merit.			
I understand what impedes a group's creativity and how to avoid or bypass these impediments.			
I am good at evaluating the merits of an idea.			
I formal strategies for generating original ideas.			

CUSTOMER SERVICE

	Like and Skilled	Like and Unskilled	Don't Like
I am good at handling details and I make few errors when I schedule, complete forms, draft correspondence, or file.			
I am good at making sure my customers are being served promptly and I often receive complements for my customer service.			
I am orderly, neat, and am good at keeping paperwork and tasks organized and moving.			
I manage time so that I get the most important tasks done each day.			
I am good at scheduling appointments and estimating how long it will take to do a particular project.			
I complete my work for the client in a neat and attractive manner.			
I can remain calm and clear and provide excellent service and support when others are nervous or uptight.			
I am able to anticipate my customers' needs and I take action to make sure they have what they need when they need it.			

MANAGEMENT

	Like and Skilled	Like and Unskilled	Don't Like
I am good at inspiring different types of people to work together toward a goal.			
I am able to coach other people so their performance improves.			
I manage time well.			
I solicit and consider others' opinions during decision-making and can use this information to decide efficiently.			
I am good at managing projects and can deal effectively with the details to complete the projects on time and on target.			
I am good at seeing through the details to the bigger picture.			
I enjoy managing people.			
I am good at delegating.			
I am able to identify and hire effective employees.			

MATH/NUMBERS

	Like and Skilled	Like and Unskilled	Don't Like
I am able to estimate revenue and expenses and perform basic bookkeeping math.			
I can estimate simple probabilities.			
I can read a statistical process control chart.			
I am good at performing mental math (arithmetic), quickly adding, subtracting and calculating percentages.			
I can plot and analyze a data set.			
I am able to express numerical relationships as ratios and averages.			
I am good at interpreting charts and graphs.			
I can set up a spreadsheet to perform calculations.			

MECHANICS

	Like and Skilled	Like and Unskilled	Don't Like
I am fascinated by learning how things work.			
I can watch a video and effectively make a household repair.			
I can troubleshoot a simple electrical problem.			
I enjoy working on computers – upgrading memory, components, or peripherals.			
I have repaired my own car or motorcycle -- and enjoyed it!			
I enjoy/have enjoyed building model cars, rockets, airplanes, etc.			
I can assemble things from a set of instructions.			
I would describe myself as being "mechanical."			

SALES AND PERSUASION

	Like and Skilled	Like and Unskilled	Don't Like
I am comfortable introducing myself to people I don't know and asking them about their businesses.			
I am energized by the challenge of surpassing a sales goal.			
I can bounce back energetically and optimistically after a series of “nos” or being hung up on.			
I am good at figuring out how I can use my knowledge, skills and abilities to add value to a client/prospect.			
I am good at listening for and identifying client wants and needs.			
I am good at building long-term relationships.			
I am good at following up with people on information requests and checking back with them.			
I am comfortable asking people to buy from me once I am certain that I can add value.			

SCIENCE/ANALYSIS

	Like and Skilled	Like and Unskilled	Don't Like
I am familiar and comfortable with simple statistics like central measures of tendency.			
I am able translate data into charts and graphs.			
I have taken college-level science classes.			
I am good at analyzing data, considering multiple perspectives, and arriving at meaningful conclusions.			
I enjoy monitor news of scientific or technological breakthroughs.			
I have participated in a science fair or two and enjoyed it.			
I enjoy designing experiments and using the scientific method.			
I can design spreadsheets to perform time-saving calculations.			
I consider myself to be good at science.			

SOCIAL SKILLS/EMOTIONAL INTELLIGENCE

	Like and Skilled	Like and Unskilled	Don't Like
I am able to contribute productively to a team.			
I am a good listener and I talk less than I listen.			
I like introducing myself to others and I enjoy meeting them.			
I care about others and I enjoy helping them.			
I have strong, long-term relationships with friends, clients, and colleagues.			
I can regulate my emotions -- remain optimistic and motivated in the face of challenges.			
I am able to constructively confront others and ask them to change their behavior.			
I can deal well with conflict and can de-escalate anger and fear in others.			

CLERICAL/ORGANIZATIONAL

	Like and Skilled	Like and Unskilled	Don't Like
I am able to organize my work and pace it so that I can get it completed in a timely manner.			
I am good at following established processes.			
I am able to quickly sort items in a list and spot errors in math, spelling, or alphabetizing.			
I am good at maintaining a clean and organized work area and can quickly locate a piece of paper or a file on my computer.			
I am an accurate touch typist, typing 60 + words per minute with few errors.			
I am able to effectively answer the phone, gather the necessary information, clearly answer questions within my area of responsibility, and smoothly transfer callers to appropriate colleagues.			
I am proficient in word processing, spreadsheet, presentation software, and the necessary enterprise software.			
I can perform simple math for basic bookkeeping and simple statistical calculation and graph/chart making.			

Which 5 skillsets (labels like Clerical/Organizational) had the most "Like and Skilled" checked? What were your top 2 skillsets that had the most "Like and Unskilled" checked?

Which jobs are most aligned with your strongest skills?

Now that you have had a chance to review your preferred skills, select the occupational group that has the closest match to your skill preferences and then take a look at the jobs profiled.

[Clerical/Operations](#): Clerical/Organizational, Customer Service

[Account Service](#): Customer Service, Clerical/Organizational, Communication, Social Skills/Emotional Intelligence

[Marketing/Sales](#): Sales and Persuasion, Social Skills/Emotional Intelligence, Business Acumen, Communication, Customer Service.

[Technical and Specialist](#): Business Acumen, Science/Analysis, Computer/Information Management, Idea Generation and Evaluation, Math/Numbers, Social /Emotional Intelligence, Customer Service, Mechanics, Management, Communication, Sales and Persuasion

[Management](#): Management, Business Acumen, Communication, Sales and Persuasion, Science/Analysis, Social Skills/ Emotional Intelligence, Idea Generation and Evaluation

[Business Owner](#): Business Acumen, Sales and Persuasion, Communication, Idea Generation and Evaluation, Social Skills/Emotional Intelligence Management

Type the job title/titles

Job #1 Title

Strongest Skills

Job #2 Title

Strongest Skills

Job #3 Title

Strongest Skills

Step 5: Assess Your Knowledge Needs (Licensing, Education, and Experience)

Customers who buy insurance and risk management services and products are literally entrusting the agent, the service staff, and the insurance company with the fiscal and physical well-being of themselves, their families, and their businesses. This is a great responsibility, and it takes a practical education and rich experience to be able to deliver a high standard of care.

Some of this required knowledge is formally assessed by testing and verified through state licensing, while other knowledge standards are set by industry businesses, associations, and educators.

Do you need a license to perform your job? (check the [job profile](#) if you are unsure).

Most sales and service jobs require a state license to sell or service insurance, as well as regular state-approved continuing education. Typically, the states conduct the license exams and set the license requirements. The various state insurance associations and some state-approved training providers offer preparatory classes for the exams. For details, [select your state from the list contained in this link](#). This is a list of insurance licensing entities organized by state.

You will need a practical education.

Regardless of your role in the insurance industry, you will need a practical education. For a listing of courses and professional insurance industry designations, please see [Get a Practical Education](#). The course and designation offerings are listed by years of industry experience recommended for each course of study and the knowledge areas covered (insurance coverage, risk management process, sales, service, business processes, and management).

Don't have insurance and risk management industry experience yet?

If not, [The National Alliance for Insurance Education & Research](#) offers seven inexpensive (\$30 each) self-paced online introductory programs that provide an overview of [property & casualty insurance basics](#) for those who do not have any insurance industry work experience.

Are you presently in college?

If you are presently in college, The National Alliance for Insurance Education & Research offers a start on professional designations through the [University Associate Program](#) and our [university partners](#).

If you are new to the industry, your experience from other industries may be a big plus.

A wonderful aspect of the insurance and risk management industry is that your prior experience from another industry may help you to deeply understand the needs and risks associated with that particular industry, type of business, or job. Make sure to check the [job profile](#) section to learn how your prior industry skills and knowledge might apply to the new position.

Are you in transition from active military service to civilian life?

Thank you for your service! Realize that your military experience has helped prepare you with the leadership skills and self-discipline needed for success in many insurance and risk management industry jobs. The [Careers for Life](#) program can help you find financial assistance for veterans and also help those who are interested in continuing education affiliated with a major university (FSU).

After reviewing the jobs that interest you, what education and knowledge will you need to enter a new job or to grow in your present position?

Step 6: Determine Your Compensation and Career path requirements

While Personal Style is not very changeable and Abilities can be changed through education and deliberate practice, Requirements such as compensation, benefits, career path, and opportunities can often be negotiated with an employer depending on the value of one's contribution to the business.

Compensation/Benefits

How much money do you want to make each year?

Realistically, how much do you need to earn each month to pay your bills and save money? (your bottom line number)

What sort of benefits would you like to have that might figure into your total compensation?

- Health insurance
- Dental insurance
- Disability insurance
- Child care
- Flex time
- Telecommuting
- Paid vacation
- Stock ownership
- Pension plan
- Profit sharing plan

Which of these statements best describes you?

I prefer commission-based pay, because it removes the cap on my earning potential.

I would prefer to be paid a fair, regular salary with an effective performance bonus program.

I prefer being paid by the hour so I can volunteer to work more hours to earn more money as needed.

Will the jobs you have researched thus far meet your compensation and benefits needs? If you are looking for more money for a job than appears in the profiles, ask a few people who do that particular type of job if they know of anyone who is compensated as you wish.. What are those people doing? How did they add value/ negotiate their compensation? What do you plan to do in the coming year to meet your compensation and benefits requirements?

Career Path

What is your ultimate career goal?

I'm not sure yet -- still exploring.

I want to be an individual contributor working for someone.

I want work as an independent contractor or independent consultant.

I want to manage a business (but not own it).

I want to own the business.

I have already arrived. I am most interested in adding more value in my present position.

Which job titles are between where you are presently and where you ultimately want to in the positions you are considering?

Step 7: Identify Your Ideal Work Environment/Culture.

By this time, you may have identified a very interesting job or two. If you were to take the same job with the same responsibilities and changed the organization in which you performed the job, your work experience may be vastly different. While considering a new position, it is helpful to make sure you have carefully evaluated the type of work environment and culture of the prospective organization.

At the highest level, the insurance and risk management industry market is divided up in to 5 business types, each with its own type of clients, function, and organizational structure. See [Compare Employer Types](#) for an overview of the different business types and the jobs available in each.

Travel Opportunity

How often would you like to travel?

Never

Seldom (a couple times a year)

Monthly

Weekly

As Often as Required

If you would like to travel, for how far and how long?

I would like to travel internationally (a week or more at a time)

I would like to travel regionally (a few days at a time)

I prefer to travel locally during the day and return home each night

Are you willing to relocate if the job required it? If so, where would you like to relocate?

Preferred Customers

With whom would you most like to work?

Individuals and families

Agents and brokers

Staff of the other businesses we work with

Business owners and executive-level staff

Internal staff and co-workers

Internal management and supervisors

Workplace Culture and Physical Environment Inventory

Indoors -- mostly on the computer and phone

Indoors -- with a variety of walk around and face-to-face meetings

Outdoors -- visiting client businesses or accident sites in person

Lots of people contact

Infrequent people contact

In a small business

In a large business

In a new and growing business

In an older, established business

In a formal workplace (suits and ties, very corporate)

In a workplace that is somewhere in the middle -- between relaxed and formal

In a more casual workplace (casual dress and relaxed attitude)

Step 8: Determine the Next Steps to Advance Your Career

How do your top two job choices match your preferences/profile?

Job 1 Title

Job 2 Title

Personal Style Match?

Yes

Personal Style Match?

Yes

Abilities Match?

Yes

Abilities Match?

Yes

Requirements Match?

Yes

Requirements Match?

Yes

Environment Match?

Yes

Environment Match?

Yes

In the next year, which job will I pursue and/or which actions do I plan to take in order to advance my career? What am I going to do to improve my knowledge and skills?

Resources

Websites

[MY CAREER ADVANCEMENT WEBSITE](#)

- [Connect with people in the industry](#) and meet industry specialists to grow your professional network.
- [Research particular industry jobs](#) and learn what is important for success in those positions.
- [Learn about different types of employers](#) and what they have to offer.
- [Find practical education resources](#) to get ahead in your career.
- [Insurance Career Stories](#)—listen, watch, and read career stories from those working in the industry.

[CAREERS FOR LIFE](#)

- [Curriculum](#)
- [Enroll](#)

[THE NATIONAL ALLIANCE FOR INSURANCE EDUCATION & RESEARCH](#)

- [Courses](#)
- [Bookstore](#)
- [Schedule or Register for a course](#)
- [Research Associates](#)

Additional Assessment Sources

There are many professionally validated and administered assessments you may encounter when you apply for a job, attend a corporate-sponsored training event, visit a career counselor, or purchase one online.

While most assessments cost money, there are some useful free versions available online. Beware, that not all of these assessments have been scientifically validated, which means that they may not measure what they claim to, or do so accurately.

We suggest that you consider taking several different surveys to see which preference/trait themes emerge for you. Each of these assessments offers a slightly different perspective and may also provide helpful pointers for communicating more effectively with people who have different personal styles, as well as suggest strategies for overcoming challenges that face particular personal styles in the workplace.

Additionally, certain profiles, like those available from The Omnia Group, have been used extensively in the industry to link personality assessment results to job effectiveness for different variations of a particular job. For example, the personality trait differences between a great commercial insurance agent and a life insurance agent. While both of these agents sell insurance, they require very different sales strategies that favor different personality types.

[Career Maze](#)—online assessment available for purchase by individuals (about \$25, from the Omnia Group).

[Career Key Test](#)—an online validated assessment featuring John L. Holland's occupation theory (\$13+).

[Big Five personality traits/assessment](#)—free online assessment that has been widely researched

[The Myers-Briggs Type Indicator \(MBTI®\)](#)—Officially administered by trained facilitators. Free versions of like instruments may be found by searching "Jung personality test." Many books are available that relate MBTI® results to career choice/development.

[DiSC® Profile](#)—Like the Meyers-Briggs, this profile has a number of free variants available online. [Tony Robbins](#) (the tall motivational speaker) offers a very complete free (requires mailing-list sign up) online DISC-like assessment.

[TTI Success Insights Assessment](#)—used in The National Alliance management classes.

[The DriveTest™](#)—an online employment screening tool that measures a salesperson's sales drive (their need for achievement, competitiveness, and optimism)