

JOB CHANGE CHECKLIST

Learn how to tell when it's time to change jobs and how to plan a successful exit for yourself.

WELCOME

Oh hello!

We've all been there, catching ourselves quietly wondering if the job we're in is where we want to be. Wondering if it's time for a change.

Then there's a good day, a pay increase, some perk or distraction and eventually, you find yourself having the same thought again, and again, and again...

The best way to prepare for a successful job change is to recognize those thoughts and begin taking simple, incremental steps toward that goal weeks, months, sometimes even years in advance.

Switching jobs may seem easy, but a truly successful job change requires planning. That's why we have created this Job Change Checklist.

It's designed to help you get clarity so you can make an exit that sets you up for success in your next endeavor.

We're glad you're here and excited to be helpful. You got this!

Caley & Whitney

ABOUT US

We're sisters Caley and Whitney Van Cleave. We've spent the past 15 years recruiting and advising, helping a variety of businesses navigate change by building effective teams and improving back-end operations. In 2019, we established Iridium to share our knowledge with a broader audience of individuals and organizations through coaching, recruitment and consulting services.



Our goal is simple yet powerful: Iridium Helps you work better.

ELEMENTS OF SATISFACTION

VALUE INDEX

Over the years, we've found that nearly all aspects of someone's job fall into six simple categories. Understanding them and deciding which ones are most important to you is critical to determining your escape strategy.



COMPENSATION

Wages, bonuses, stock, benefits, time off, etc.



ENVIRONMENT

Includes schedule, location, working conditions, etc.



SCOPE OF WORK

Job responsibilities, role, tasks, duties, etc.



INTERPERSONAL

Relationships with managers, colleagues, reports, etc.



PROGRESSION

Advancement opportunities, continuing education, etc.



PURPOSE

Mission, vision, passion, values... your why.

Exercise:

Pick the three elements above that are most important to you and write one concise statement explaining why for each in the space below.

TIME TO CHANGE QUIZ

		YES	NO
1	Can the compensation here meet my expectations?	<input type="checkbox"/>	<input type="checkbox"/>
2	Can I continue working in this environment or in these conditions?	<input type="checkbox"/>	<input type="checkbox"/>
3	Can I continue doing this type of work?	<input type="checkbox"/>	<input type="checkbox"/>
4	Can I continue working with this group of individuals?	<input type="checkbox"/>	<input type="checkbox"/>
5	Can I be supported here?	<input type="checkbox"/>	<input type="checkbox"/>
6	Can I be valued here?	<input type="checkbox"/>	<input type="checkbox"/>
7	Can I get to where I want to go from here?	<input type="checkbox"/>	<input type="checkbox"/>
8	Can I change any of the No's above?	<input type="checkbox"/>	<input type="checkbox"/>
	Totals:	<input type="checkbox"/>	<input type="checkbox"/>

RESULTS

2 or Fewer No's - Stay Aware and Start Pondering

3 or More No's - Time to Get Proactive and Start Preparing

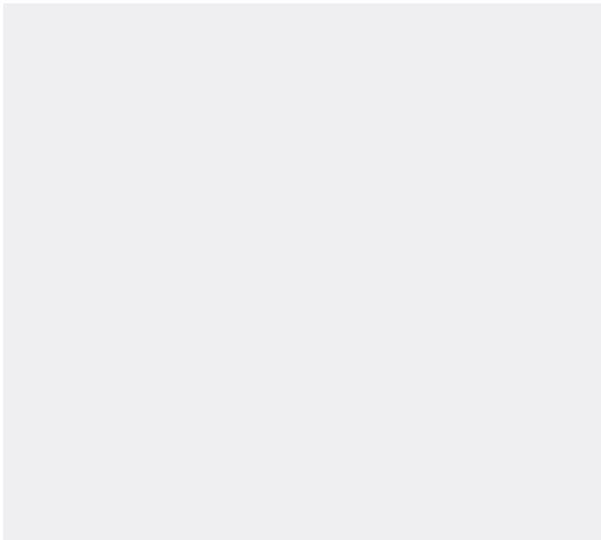
EXERCISE

UNPACK IT FURTHER

It's important to understand the specifics behind each previous answer in connection with the six values areas. Diving into the details will provide you clarity on items that need to be addressed.

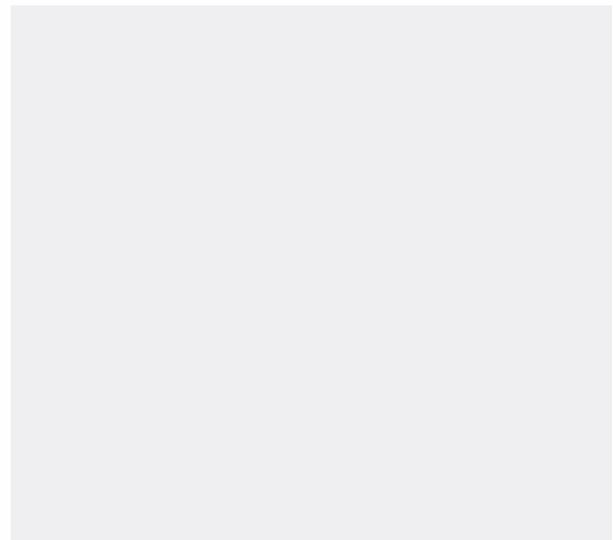
Question 1

What does my compensation need to be to meet my expectations?



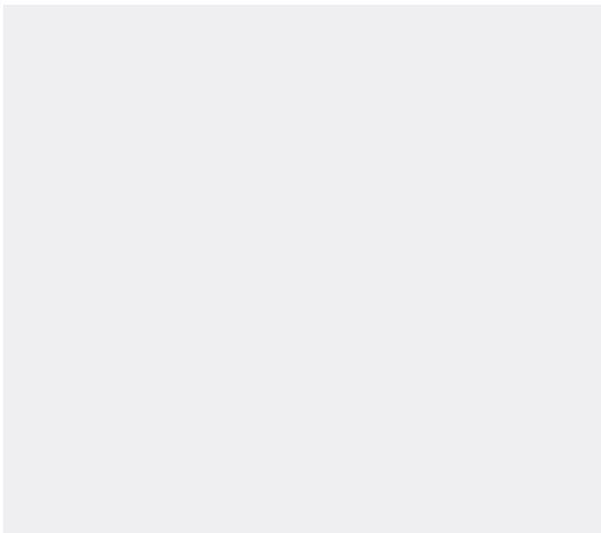
Question 2

What kind of environment and conditions do I want to work in?



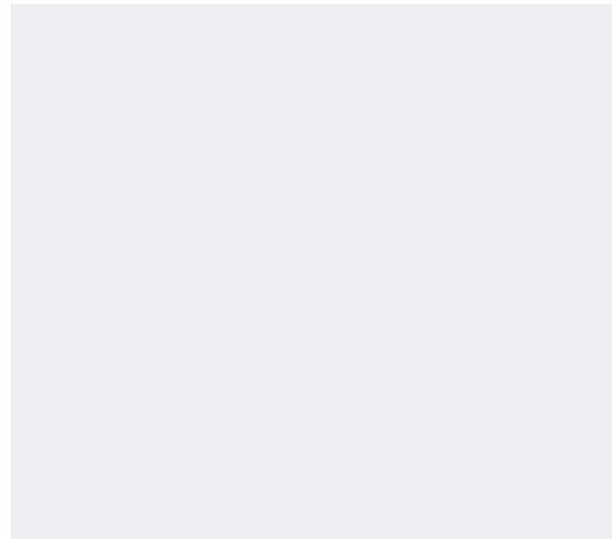
Question 3

Where do I want to be in the future?



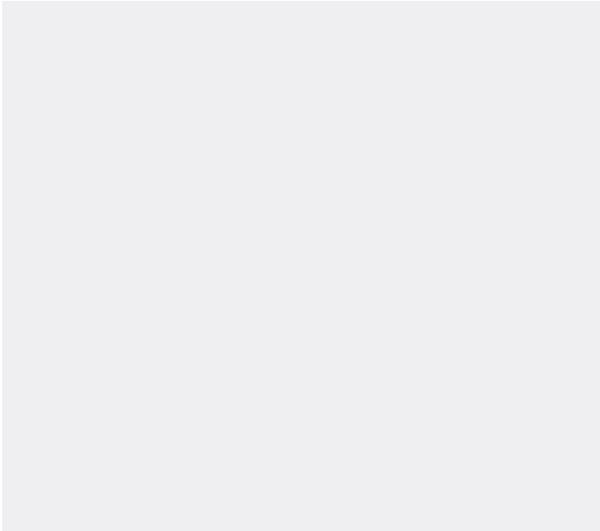
Question 4

What kind of work do I want to continue to do?



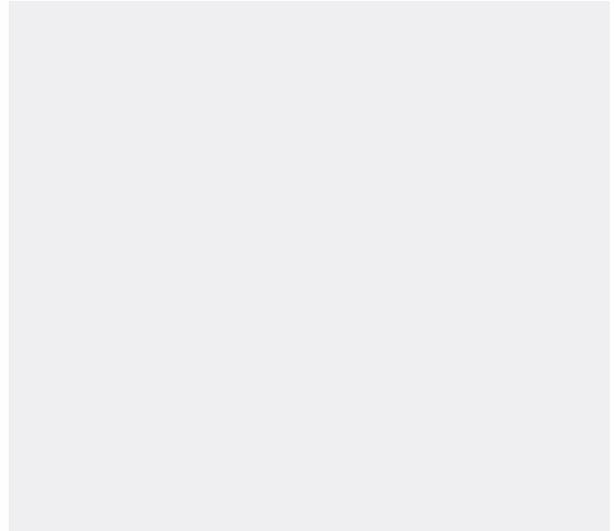
Question 5

What kind of team do I want to work with?



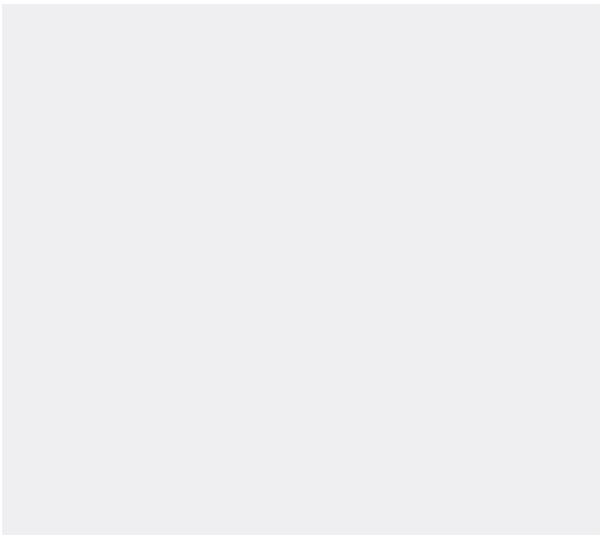
Question 6

What kind of support do I need?



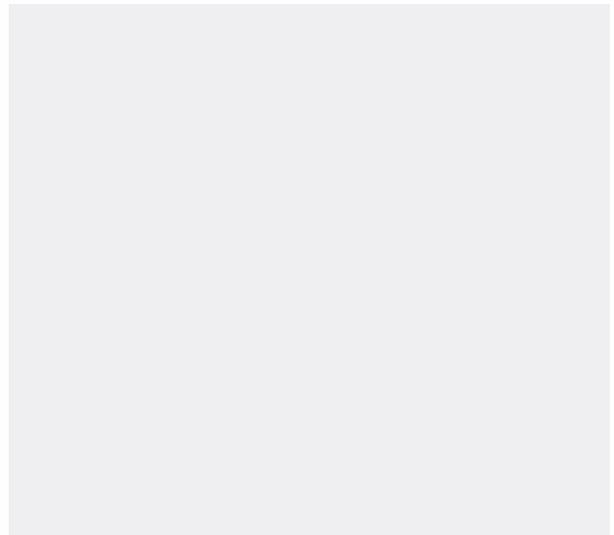
Question 7

How do I want to be valued?



Bonus Question

What question about my job satisfaction am I NOT asking myself? Why?



RESOURCE

TRANSITION TIMELINE

When it comes to actually making a transition, the timing and what needs to be done can cause overwhelm in a big way. That overwhelm can lead to paralysis and non-action. We get it. That's why we've laid out the four simple steps so you can take action and move forward.

01

GATHER YOUR WAGE & BENEFIT INFO

From earnings to benefits, it's important to locate the key pieces of information to consider.

02

REVIEW YOUR DOCUMENTS

As an employee, it's important to understand what your obligations and responsibilities are for your exit.

03

START YOUR JOB SEARCH

From applying to job postings to using a recruiter, however, you go about it, the most important piece of your job search is to just get started.

04

STAY ACTIVE

Generate momentum through consistency in your job search. It's important to continue taking small actions towards your goal.

EMPLOYMENT DOCUMENTATION

REVIEW CHECKLIST

Remember all of those documents you may or may not have read but probably signed way back when you started your current position? Yeah, it's time to track those down and review them. The following documents will provide you clarity about what your expectations, obligations, rights, and receivables are in a separation.

- Offer Letter
- Employment Agreement
- Non-disclosure, Non-solicitation, Non-compete Agreement
- Employee Handbook or Manual
- Benefits Plan Documentation (Health, 401K, Life, Disability etc.)
- Confidentiality Agreement
- Bonus, Commission, Equity, or Stock Documentation
- Any agreements regarding expense reimbursements for licensing, tuition, car allowances, etc.
- Separation Agreement - This is typically provided by the company in the event that you are being laid off and can often be negotiated before signing.

WHAT TO WATCH OUT FOR

In any of the documents above, you want to understand what you need to do, when and how, and what the consequences are for taking (or not taking) any expected action. Be sure to consider these things in relation to how it could possibly affect your job search or next position (especially non-competition clauses).

INFO CHECKLIST

When it comes to job transitions, understanding the full picture of financial considerations is key. Not only is it important in planning your exit, it gives you clarity about what compensations and benefits you'll be looking for in your job search as well. The questions in this checklist will guide your gathering efforts.

- What is my company's fiscal year?
- What is my pay period and frequency?
- Am I owed any bonuses or commissions?
- What are the benefits provided by my company that I will want or need to get for myself?
- Do I have any anticipated medical procedures or costs that would be impacted by a loss or change in coverage?
- Do I have any accrued but unused paid time off? Will it be paid out upon exit or is it "use-it-or-lose-it"?
- Do I have any accreditation, licensing, or educational factors that are made possible by or through my employer?
- Is there anything that I need to repay if I leave (such as relocation expenses or signing bonuses)?
- Do I have ownership, equity, or stock that will be impacted? If so, how?
- Am I financially able to be unemployed? For how long?

CONGRATULATIONS!

You now have the hard data to reference as a baseline to use in your exit planning AND when you are reviewing job postings or considering offers.

PREPARE YOURSELF

Making a meaningful job changes takes time and work, preparation, patience and consistency. Set yourself up for success by answering the three following questions.

When are you going to change jobs?

Be specific! The more detail you can put to your timing goal, the easier it is to plan and do the steps to get there.

Why are you going to change jobs?

Write a short statement that captures why you are proactively seeking a new job and what you are looking for. Think of it as a transformation statement. Memorize it, repeat it, put it out there, tell your friends, and family. This will keep you accountable and in action.

How are you going to change jobs?

A successful job transition takes consistent effort. Write down three actions you are going to take and the frequency of those actions.

Ta-da! That's your job change plan!

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