

Career Planning Guide

A practical roadmap for building a career in tax support, customer service, and remote work.

Self-Assessment

- List your top 5 strengths and 3 areas you want to improve.
- Identify work environments where you thrive (remote, hybrid, structured).
- Define your non-negotiables: pay, hours, commute, growth potential.
- Ask peers or mentors for honest feedback on your blind spots.

Goal Setting (1–3–5 Year Plan)

- 1 Year: Gain certification or land a target role.
- 3 Years: Lead a team, specialize (e.g., tax law, QA, training), or increase income by 30%.
- 5 Years: Management, consulting, or starting your own firm.
- Write goals as SMART statements: Specific, Measurable, Achievable, Relevant, Time-bound.

Skill Building

- Tax season prep: Enroll in IRS VITA or similar volunteer programs.
- Software skills: Master Excel, QuickBooks, and one major tax platform.
- Soft skills: Practice active listening, empathy statements, and de-escalation.
- Communication: Take a business-writing or presentation course.
- Networking: Join industry Slack groups and attend virtual conferences.

Tracking Progress

- Update your resume quarterly, not just when job hunting.
- Keep a 'win log' — document achievements, kudos, and metrics.
- Schedule a 30-minute monthly career review with yourself.
- Revisit your goals every 6 months and adjust as needed.

- Find an accountability partner or career mentor.

When to Pivot

- You dread logging in for more than 2 weeks straight.
- Your role no longer challenges you or offers growth.
- Market demand for your skills is declining.
- A better opportunity aligns with your long-term vision.
- You have a financial cushion to support a transition.

Careers are marathons, not sprints. Plan with intention, adapt with grace.