

## 20 Year Perspective – Illustrative example

### Example:

Alice is a mid-career Business Intelligence professional at a technology consulting software company in Denver, CO. Over the past eight years since graduation, Alice has been promoted into increasingly senior roles and she is currently the BI team lead.

Alice aspires to become a manager and eventually rise to the position of Chief Digital Officer. She has a technical undergraduate degree and has considered going back to school at some point in the future to earn an MBA or an alternative specialized degree in technology management.

She recently got engaged to her long-time partner Charles, and they are planning their wedding for ten months from the present date. While Alice's current focus is on career, she hopes to start a family in the next five years.

Outside of work, Alice is a devout yoga practitioner and travels regularly to an Ashram in India for spiritual and holistic development. Alice plans to become certified as a yoga instructor and teach yoga part-time on a video channel that she frequently blogs on.

Alice's parents married late in life, and she is an only child. Her parents recently retired, and they are generally in good health after moving to a lower cost city in the mid-western United States. Alice and Charles travel to see her parents on major holidays.

## **In 20 years**

*we like to start with the distant future first and work our way backwards*

**My age:** 48

**I am living in** (city/country): A major city, working remotely.

## **Professional Life**

### **List job title/responsibilities:**

Award winning Chief Digital Officer; Start-up Board member, advisor and investor.

### **List the type of company/industry:**

In-house role at a Software or Technology company, or portfolio roles at a PE/VC firm

### **Required skills and experiences:**

General Management, Strategy, Machine Learning and Artificial Intelligence

Experience in various Executive roles (Director, VP, SVP) at companies of various sizes/maturities

### **Expected compensation and remuneration:**

Total Comp 7-figures (More focus on stock and options)

## **Personal Life**

### **List activities that you are engaged in:**

Yoga, yoga, yoga! Travel, retreats (if kids are old enough)

### **List level of engagement/expertise:**

Maintain my IYTA Trainer accreditation

### **List other bucket list accomplishments:**

Regularly teaching classes on weekends

### **Required skills/resources and experiences to get to this level:**

See certification requirements

### **Expected level of commitment** (i.e., hours/week):

Daily practice (1 hour) plus 8 hours a week teaching

### **My level of health/fitness:**

Focus on flexibility and endurance

## **Family life**

**Are you in a committed relationship?** Yes, engaged.

**Are you supporting a family?** No

**Do you have dependents?**

Yes. 2 children (more?), probably in High-school or Middle-school. Maybe a dog. Parents in their mid-seventies.

**What level of support they need** (Finances/Time):

Kids need college funds (Should be okay if we start a 529 and keep funding it). Weekends to take them to after school activities.

Parents need more help, assistance getting around. They might want to see grandkids more.

## **In 15 years**

(We like to start with the distant future first and work our way backwards):

**My current age:** 43

I am living in (city/country): A major city

## **Professional Life**

**List job title/responsibilities:** VP or SVP role if in-house role or Partner/Principal role Consulting

**List the type of company/industry:** Ideally a fast-growing software company with a focus on ESG..

**Required skills and experiences:**

Mentoring/Coaching?

Management Roles of increasing seniority.

If planning to shift over to in-house corporate role, I need to build up a brand as a data transformation expert

**List expected compensation and remuneration:**

Clearing \$350k in total comp (Based on Bay-area benchmarks)

## **Personal Life**

**List activities that you are engaged in:**

Teaching Yoga, Parenting groups

**List level of engagement/expertise:**

IYTA accreditation

**List other bucket list accomplishments:**

Kids older, I get more balance in my life

**Required skills/resources and experiences to get to this level:**

Keep up my accreditation requirements

**Expected level of commitment (i.e., hours/week):**

Daily practice (1 hour) plus 4 hours a week teaching

**My level of health/fitness:**

Healthy lifestyle, balance is key.

## **Family life**

**Are you in a committed relationship?** Yes

**Are you supporting a family?** Yes

**Do you have dependents?**

2 kids. Early teens or middle school

**What level of support they need (Finances/Time):**

Expect non-work life to revolve around kids

My parents in their late 60's and in-laws in their early 60's.

We live in different parts of the country, so their ability to assist is minimal.

**In 10 years**

(We like to start with the distant future first and work our way backwards):

**My current age:** 38

**I am living in (city/country):** Major Metropolitan City (Move to the East Coast?)

**Professional Life**

**List job title/responsibilities:** Principal or Junior Partner Role in Consulting Firm

**List the type of company/industry:** Tech Consulting, possibly at another firm to jump up

**Required skills and experiences:**

MBA or equivalent master's degree (AI/ML?) or Professional Certification

Need two years to do a degree (If I haven't gotten this by 33, then explore studying part-time as an option)

**List expected compensation and remuneration:**

Glassdoor comparisons list \$180-\$200k

**Personal Life**

**List activities that you are engaged in:**

Yoga practice, raising kids, afterschool activities, playdates etc. My master's degree coursework

**List level of engagement/expertise:**

Must build a routine; consider getting extra help (cleaner, part-time nanny, in-laws?)

List other bucket list accomplishments:

**Required skills/resources and experiences to get to this level:**

**Expected level of commitment (i.e., hours/week):**

Expect very full schedule with no buffer

Potentially schedule maternity leave around school?

**My level of health/fitness:**

Must keep up Yoga prenatal and postnatal

**Family life**

**Are you in a committed relationship?** Yes

**Are you supporting a family?** Yes.

**Do you have dependents?**

2 young children (Elementary School or Kindergarten age)

**What level of support they need (Finances/Time):**

Mom/Dad in mid 60's.

## **In 5 years**

(We like to start with the distant future first and work our way backwards):

### **My current age: 33**

I am living in (city/country): Current major city in the West Coast

### **Professional Life**

#### **List job title/responsibilities:**

Senior Engagement Manager or Principal (stretch goal)

#### **List the type of company/industry:**

Consulting, maybe switch firms?

#### **Required skills and experiences:**

Keep up technical skills, build a brand as a WIT (Women in Tech) leader

#### **List expected compensation and remuneration:**

\$175k (stretch \$200k)

### **Personal Life**

#### **List activities that you are engaged in:**

Yoga certification or bust

Data Architect designation

#### **List level of engagement/expertise:**

Yoga

20 hours a week teaching

6-month trainer course and training

Architect

Course, Application, and training

Get company to pay for training and certification

#### **List other bucket list accomplishments:**

Travel to Greenland with college friends for college reunion

#### **Required skills/resources and experiences to get to this level:**

4-star ratings or higher

Above or excellent customer ratings

#### **Expected level of commitment (i.e., hours/week):**

60-80 hours

#### **My level of health/fitness:**

Focus on diet

Max our company wellness benefits!

### **Family life**

**Are you in a committed relationship?** Yes

**Are you supporting a family?** No

**Do you have dependents?**

Planning for kids in 5 years

**What level of support they need (Finances/Time):**

Parents active and traveling