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## Career Coach: Set 2015 Goals ... and Stick to Them

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By Clare Trapasso

**How can fund professionals set—and stick to—2015 goals?** *Responses have been edited for clarity and concision.*



**Bonnie Bell is the director of career and life coaching at Bell Investment Advisors, a registered investment advisory firm based in Oakland, Calif.**

Instead of making resolutions, which all the research shows does not really work, it's more productive to consider larger questions. It does begin with some reflecting.

You want to make a list of all the things that are working. Then you want to look at what's not working ... what's missing and what's next. This is how you build positive momentum for your business or your life.

It's a new year. [But] often people just plunge in unconsciously as if there's nothing to change, it's just another day of work, it's just another year. It's like a treadmill. Planning is how you're going to go about achieving whatever it is you want. If you're not assessing your progress, you're just spinning your wheels.

The New Year is an opportunity to take effective action. It's more about what actions need to be taken. That turns into a plan. That can become your plan for the year. Planning is everything.



**Melissa Llarena is a career coach and owner of Career Outcomes Matter in New York. She specializes in financial services and formerly worked in human resources and marketing at [JPMorgan Chase](#).**

Finance professionals need to map out what the next three, six, nine months should be like for them.

My most successful clients really look at ... what's going to have the greatest influence on their performance goals. Any large financial services organization is going to have performance reviews and goals that you have to achieve and really look toward as a guiding light on a daily basis.

If you have an aggressive revenue goal and you're monitoring it on a daily basis, it's about breaking it into small pieces. They need to have some sort of road map for what is going to be at the top of their to-do list. You need to break it up into tiny little goals for yourself month by month.

Reward yourself when you achieve a major milestone. The next time it will just inspire you more to achieve the next goal. Have a support system around you. That [helps] prevent failure.



**Chad Astmann is head of the asset management practice for North America at [Heidrick & Struggles](#), a recruiting firm, and is based in New York.**

You can get distracted very easily in the industry by changing markets, changing competitive landscapes, people issues internally. There are lots of things that will take your eye off achieving your goals.

Starting the year out with a strategic planning session is critical.

The first thing to do is sit down and say, where are we today? How do we stack up against the competition? Where do we want to be in one year? What are the key three things we need to happen to get there? What do we need and what are the challenges that will prevent us from getting to those goals?

Regularly come back to those goals. When the unexpected intervenes, you can respond accordingly, but maintain focus. Being able to say we have these goals we set out in the beginning of the year, and even though this wild unexpected thing happened, we need to maintain our focus.

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