

THE CAREER PIVOT PLAYBOOK

A Step-by-Step Guide to Reinventing Your
Career With Confidence



HI THERE,
NICE TO
MEET YOU!



This playbook is about taking control of your path forward on purpose, on your terms, and without blowing up your life to do it.

Career pivots often begin with an ending you didn't choose: a layoff, a restructure, a role that disappears. Even when it's not personal, it can surface a bigger question: what do you want the rest of your career to look like?

This playbook is built for that moment.

This process is about taking back control of your path forward; thoughtfully, realistically, and on your terms. If you're here, you likely have solid experience and little interest in repeating the same chapter. You don't want to start over, but you don't want to settle. You want your next move to make sense for your skills, your energy, and your life as it exists now.

These 16 steps provide a practical decision-making framework: from clarity and criteria to market opportunity, low-risk testing, and a confident go-forward plan. Along the way, you'll use structured exercises, ready-to-use scripts, and strategic AI prompts to move faster.

Inside, you'll find:

- Exercises to clarify what matters and what transfers
- Tools to research and test pivot ideas before committing
- Scripts for informational interviews, job interviews, negotiation, and exits
- Practical AI prompts to generate options and think strategically
- Frameworks for branding, outreach, proof, and early momentum
- Contingency and consulting strategies to protect optionality

By the end, this won't feel like "What should I do next?" It will feel like "Here's the direction I've chosen and how I'm moving forward."

You don't need clarity before you begin, because clarity tends to follow movement. Start with one step and let the framework do its job.

This is your career. You get to choose what happens next.

HOW TO USE THIS PLAYBOOK

This playbook is not meant to be rushed or completed in one sitting. It's a structured process designed to help you think clearly, make informed decisions, and move forward intentionally.

A few things to know before you begin:

1. This Is a Framework, Not a Checklist

You don't need to "finish" everything to make progress. Each step builds on the one before it, but you can pause, revisit, or move more slowly where needed. The goal is direction, not perfection.

2. Take It One Step at a Time

Overwhelm usually comes from trying to solve everything at once. Don't. Focus on the step you're in. Complete the exercises, reflect honestly, and then move forward. Clarity tends to emerge through action, not overthinking.

3. Use the AI Prompts as Support, Not Authority

The AI prompts included throughout the playbook are tools to help you generate options, surface patterns, and speed up thinking. They don't replace your judgment. You're still the decision-maker. These prompts simply help you think more strategically and efficiently.

4. Expect Your Thinking to Evolve

It's normal for your answers to change as you move through the steps. That's not backtracking; it's learning. This process is designed to help you refine your thinking based on evidence, not lock you into early assumptions.

5. Progress Beats Intensity

You don't need to work on this every day. Consistent weekly effort—60 to 90 minutes at a time, which is more than enough. Small, steady progress creates momentum and confidence.

6. This Is Your Playbook

Skip what doesn't apply and spend more time where it matters. There is no "right" pace or path; only the one that fits your life, priorities, and risk tolerance.

If this feels like a lot right now, that's okay. You're not behind. You're just at the beginning of a more intentional way forward.

Start with Step 1. Let the process do its work.

STEP 1: Last Role Reality Check

Before making any career move, it's important to understand what's actually driving the desire for change. A clear sense of why helps you make intentional decisions and avoid pivots that look appealing on the surface but don't truly fit.

Instructions: Rate Your Current Role

This exercise is designed to help you understand why a career pivot may be calling you. There are no right or wrong answers, only honest ones.

Rate based on your lived experience today, not how the role used to be or how you wish it would become. Go with your first, instinctive response and don't overthink it.

Based on my last role, check the appropriate box for each area: 1 = does not work well for me, to 5 = works extremely well for me	1	2	3	4	5
Interest / energy					
Impact					
Career growth					
Personal growth					
Values alignment					
Pace & sustainability					
Utilizes my strengths and abilities					
Future viability					

Once you've completed all ratings, review your scores and note:

- The lowest two scores
- The highest two scores
- Any ratings that surprised you

Use these patterns to begin understanding what's driving your desire for change.

ASK YOURSELF: What two ratings matter most to me right now, and why?

STEP 1: Last Role Reality Check

Core Questions

1. What stood out?

- Which ratings were noticeably high or low?
- What patterns do you see across the areas you rated?

2. What two ratings matter most to you right now?

- Why these two?
- What do they reflect about what you need more or less of at this stage?

3. What feels most out of alignment?

- Where is the biggest gap between what you want and what your last role provided?

4. What is still working?

- Which areas are strong enough that you want to preserve or build on them?

5. What is this not about?

- What might be frustrating, but isn't actually the reason you want to pivot?

You're not looking for a perfect answer, simply just a clearer signal about what's driving your desire for change.

STEP 2: Set Your Decision Criteria

Before exploring new roles, get clear on what will guide your decisions. Defined criteria help you evaluate options intentionally, so your next move is planned, not reactive.

Instructions

Review each area below and the items listed within it.

- Circle anything that is a **must-have** for your next role
- Star anything that would be **nice to have**, but not required

A **must-have** is something that needs to be present for a role to work for you.

A **nice-to-have** would be a bonus, but its absence wouldn't be a deal-breaker.

Work quickly and trust your instincts. This isn't about what *should* matter; it's about what matters to you **now**.

Compensation & Benefits

- Minimum base salary (e.g., \$X/yr)
- Above-market base + bonus
- Bonus/commission structure
- Equity/stock options
- Retirement contributions (401k, pension)
- Extra PTO or sabbatical options
- Healthcare & wellness benefits
- Personal development / executive coaching budget
- Relocation/housing allowance
- Severance package

Lifestyle & Logistics

- Remote vs hybrid vs in-office expectations
- Work from anywhere (international flexibility)
- Reasonable commute (if hybrid/in-office)
- Maximum acceptable travel %
- Average workweek hours
- Flexibility (hours, compressed week)
- Private office / ergonomic home office stipend
- Concierge-level benefits (health club, meal service, travel upgrades)
- Modern tech stack / collaboration tools

Values & Culture

- Ethical alignment (industry/company practices)
- Social/environmental responsibility initiatives
- Diversity, equity & inclusion commitment
- Leadership style (collaborative vs hierarchical)
- High-trust culture (autonomy vs micro-management)
- Transparency in communication and decision-making
- Respect for work/life balance
- Innovative or entrepreneurial environment
- Strong learning culture

Role & Scope

- Level/title
- Strategic vs operational balance
- Minimum size of budget or P&L responsibility
- Authority to hire/fire or build teams
- Access to board/CEO or decision-making influence
- Team size aligned with leadership preferences (small agile vs large orgs)
- Cross-functional exposure
- Opportunity to build something new (division, product, market entry)
- International scope / global impact

STEP 2: Set Your Decision Criteria

Career & Future

- High visibility role (recognized internally & externally)
- Media/PR opportunities (thought leadership, speaking)
- Networking access (PE/VC ties, industry groups)
- Advisory/side project flexibility
- Clear succession to executive roles
- Clear succession planning or promotion pathway
- Ability to leverage existing expertise (not total reset unless intentional)

Summarize your priority list below

Must-Haves

1

2

3

4

Nice-to-Haves

1

2

3

4

Reflection

- Which must-haves surprised you, if any?
- Which nice-to-haves were harder to let go of?
- Looking at what you marked, what does this list tell you about what you need more or less of in your next role?

STEP 3: Explore Possible Pivots

This exercise utilizes self-reflection and AI to identify career pivot possibilities.

Four Buckets Exercise

Directions:

1. Answer each of the four buckets as clearly and honestly as possible
2. Use AI (ChatGPT, CoPilot, etc.) with the provided prompts to generate and research roles
3. Review & refine.

Bucket 1: List below things/areas you are interested in? (Topics, industries, activities)

Bucket 2: List below things that you are good at. (Skills & strengths)

Bucket 3: What do I want more of (from previous step)?

Bucket 4: What am I no longer willing to tolerate?

TIPS:

Be unapologetically honest and generously complete.

This exercise only works if you tell the truth.

Include what energizes you, what drains you, what you're actually good at (not what you wish you were), and the priorities you refuse to compromise.

Once your list is complete, move to the next page

STEP 3: Explore Possible Pivots

You will now leverage AI to analyze your lists and provide suggestions.

TIP: the more specific you are with your buckets, the more aligned the results.

AI Prompt: Use the below prompt to identify potential pivot careers, based on your buckets.

You are an Executive Career Strategist and Market Analyst with 20+ years of experience guiding experienced professionals through intentional career pivots. Below are four self-reflection lists:

1. What I'm consistently good at (skills & strengths) [paste in your list]
2. What interests me (topics, industries, activities) [paste in your list]
3. What I want more of now (from my decision criteria) [paste in your list]
4. What I am no longer willing to tolerate (deal-breakers) [paste in your list]

Your task: Analyze these lists together to identify career pivot zones: clusters of roles or career directions that align with this profile. Do not recommend a single job. Focus on options that balance skill fit, personal alignment, and market viability. Think like a strategist, not a recruiter.

Output Structure

1. Career Pivot Zones (3–5 total).

For each zone, include:

- A clear label (career direction, not just a title)
- A brief explanation of why this zone fits the profile
- Example roles that commonly fall within this zone

2. Strengths Translation: Explain how the skills and strengths listed could realistically transfer into these pivot zones.

3. Interest Alignment: Call out which pivot zones best align with stated interests, and where alignment is moderate rather than strong.

4. Decision Criteria Fit: Assess how each pivot zone aligns with what I want more of now and avoids what I am no longer willing to tolerate. Be explicit about trade-offs where relevant.

5. Risks, Gaps, and Constraints: Identify likely skill gaps, experience gaps, or market risks that should be evaluated before committing.

6. Prioritization & Ratings: For each pivot zone, assign a 1–5 rating (with brief justification) for:

- Skill Fit
- Interest/Energy
- Alignment with Decision Criteria
- Market Viability
- Overall Worth Exploring Further

*Do not inflate scores. Use ratings to differentiate, not to please.

7. Next-Step Validation Ideas: Recommend low-risk actions to test the top 1–2 highest-rated zones (conversations, experiments, short projects, learning sprints).

STEP 3: Explore Possible Pivots

OPTIONAL: Deep Dive

Use this optional Deep Dive only when:

- One or two directions clearly stand out
- A path aligns well with your interests and decision criteria
- You are considering investing time, learning, or energy to pursue it
- You want a clearer picture of risks, trade-offs, and long-term viability

AI Prompt: Use the below AI prompt for each of your top two or three possible pivots.

You are a Career Market Intelligence Analyst and Executive Career Strategist with 20+ years of experience advising mid-to-senior professionals on career pivots. I have identified a career direction that scored highly during my initial research. I am now looking for a focused, executive-level analysis to help me evaluate whether this path is worth serious pursuit; not to make a final decision.

- *Career Direction / Role: [Insert role or career field]*
- *Target Geography (optional): [City/Region/Country or "remote/global"]*
- *Target Industry (optional): [Industry focus or "general"]*

Your Task: Produce a structured, practical analysis that balances opportunity, risk, and realism.

Output Structure

1. Role Reality Check

- Core responsibilities and day-to-day work
- Typical environments or organizational settings
- What people are often surprised by once in this role

2. Entry & Transition Pathways

- Common entry points for experienced professionals
- How career switchers typically break in
- Adjacent roles that can act as stepping stones

3. Market & Compensation Snapshot

- Current demand level and hiring trends
- Broad compensation ranges (entry, mid, senior)
- Types of organizations most actively hiring

4. Future Outlook (5–10 Years)

- Expected growth or decline and key drivers
- Impact of technology, regulation, or industry shifts
- Long-term opportunities and risks

5. Skills & Competitiveness

- Transferable skills that carry over well
- Top skills or experiences needed to be competitive
- Credentials, certifications, or training that matter most

6. Competitive Landscape

- Typical candidate backgrounds
- What differentiates strong candidates in this field
- Common barriers or gatekeepers to be aware of

7. Fit & Risk Assessment

Rate this career direction 1–5 (with brief rationale) on:

- Skill Alignment
- Learning Curve & Time to Competence
- Market Stability
- Long-Term Sustainability
- Overall Attractiveness Given My Profile

*Be candid. Highlight trade-offs, not just upsides.

8. Validation & Next Steps

- 3–5 concrete actions to validate this path
- Recommended conversations, experiments, or short-term moves
- Signals that would suggest "go deeper" vs. "reconsider"

STEP 3: Explore Possible Pivots

Review & Reflect

Use this page to step back and make sense of what you've learned so far. You're not choosing a path yet; you're noticing what's emerging.

**This becomes
your short list**

Review & Reflect

1. Which career directions stand out?

- List the 1–3 options that caught your attention during your scans or deep dives. (Name the direction, not a specific job title.)

2. Why do these stand out?

- What specifically drew you to each option?
- Interest, energy, alignment, market strength, something else?

3. What feels like a genuine fit?

- Which options align most closely with your strengths and decision criteria?
- Where did you feel a sense of “this could work for me”?

4. What gives you pause?

- What concerns, trade-offs, or open questions came up?
- Which feel manageable—and which don't?

5. What are you curious to test?

- Which one or two directions feel worth exploring further, even without full certainty?

TIPS:

You're not looking for certainty here; just enough information to choose a smart next step.

STEP 4: Assess Your Toolkit

Review the skills listed in each bucket below.

- Circle any skills that are already in your toolkit
 - Star the skills that energize you the most
 - X any skills that are applicable, but you do not possess (this is the gap)
- **You may circle and star the same skill.

This list is a starting point. Feel free to add any additional skills that belong in your toolkit.

Strategic Leadership & Vision

- Strategic planning & execution
- Vision setting & storytelling
- P&L ownership
- Market entry strategy
- Business model innovation
- Change leadership / turnaround management
- Board and investor relations
- Merger & Acquisition integration

Operational Excellence

- Scaling processes & systems
- Risk management & compliance
- Supply chain optimization
- Financial discipline / cost reduction
- Data-driven decision making
- Digital transformation
- Program/portfolio management
- Process redesign & efficiency gains

Growth & Market Impact

- Go-to-market strategy
- New product launch
- Brand building & positioning
- Global expansion
- Customer acquisition & retention
- Pricing strategy
- Channel/partnership development
- Competitive intelligence

People & Culture

- Executive team leadership
- Talent development & succession planning
- Cross-functional collaboration
- Diversity, equity & inclusion (DEI) leadership
- Conflict resolution
- Coaching & mentoring
- Culture building during growth or change
- Stakeholder alignment

Innovation & Future Readiness

- Emerging tech adoption (AI, automation, etc.)
- Sustainability/ESG initiatives
- Research & Development leadership
- Innovation pipeline creation
- Scenario planning
- Crisis management
- Reputation management
- Thought leadership & public speaking

TIPS:

This isn't about proving you're qualified. It's about recognizing what you already bring; and deciding what's worth building next.

STEP 4: Assess Your Toolkit

Build your transition plan

This step turns insight into action. You are not trying to close every gap or prepare perfectly before moving forward. The purpose of this exercise is to identify a focused, realistic plan for becoming competitive in a new direction, without overcorrecting or overwhelming yourself.

You'll use AI as a career strategist to help you translate what you already have into a clear transition roadmap. This is a planning tool, not a to-do list you must complete all at once.

Instructions

1. Review your completed skills and gaps from the previous page.
2. Summarize your key takeaways:
 - Core strengths and transferable skills
 - Notable gaps
 - Overall fit or readiness score (if you created one)
3. Paste that summary into the prompt below.
4. Run the prompt on the next page, then review the output with a practical lens. You are looking for:
 - Priority actions (not everything)
 - Gaps that matter most
 - Steps that feel realistic given your time, energy, and goals

You do not need to act on every recommendation. Highlight what feels most useful and ignore the rest.

STEP 4: Assess Your Toolkit

Build your transition plan

AI Prompt: For each of your pivots, use this prompt to help create an action plan for career transition. Start a new thread for each pivot to keep your research organized.

You are an Executive Career Strategist and Leadership Development Coach with 20+ years of experience helping experienced professionals pivot into new industries and senior roles.

Using the alignment and gap analysis below, create a focused, realistic transition plan that prepares this candidate to become competitive for the target role. Prioritize impact over volume and recommend the minimum effective actions.

Here is the alignment and gap analysis:

[Paste summary of strengths, transferable skills, and gaps here]

Your Task: Build a personalized Career Transition Roadmap that addresses only what truly matters for readiness. Do not include exhaustive lists.

Output Structure

1. Skill Development Plan

- Identify the top 3–4 skills or experiences to prioritize.
- Recommend practical ways to build them (stretch work, short courses, projects, mentorship).

2. Education / Credentials (If Needed)

- List only credentials that meaningfully improve credibility.
- Clearly label each as Required, Helpful, or Optional.

3. Experience Gap Plan

- Recommend 2–3 realistic ways to gain missing experience (fractional work, advisory roles, internal projects, boards, etc.).

4. Networking & Branding Plan

- Suggest 3–5 high-leverage actions to reposition toward the target role.
- Focus on visibility and narrative, not broad activity.

5. Timeline (High-Level)

- Outline a simple 3 / 6 / 12-month progression with key milestones.
- Highlight quick wins in the first 90 days.

6. Readiness Checklist

- Provide 5–7 indicators that signal readiness to actively pursue the target role.

Guardrails: Be candid about trade-offs. Avoid generic advice. This roadmap supports intentional preparation—not perfection.

STEP 5: Test Market Opportunity

This step helps you move from possibility to focus.

Rather than chasing roles broadly, you'll use this exercise to identify where your experience, decision criteria, and current market conditions overlap. The goal is not to create a long list of companies; it's to surface a short, high-quality target list that's actually worth your energy.

Instructions

1. Choose one target role or function you are actively exploring from your short list.
2. Define your industry focus, location preference, and key decision criteria (must-haves first).
3. Paste that information into the prompt below.

Review the output and highlight:

- The top 5 companies that feel like the strongest fit
- Any patterns in company size, stage, or industry
- Signals that confirm or challenge your assumptions about the market

You are not committing to these companies yet. You're identifying where opportunity is most likely so your next actions can be targeted and intentional.

AI prompt: Use this Prompt for corporate careers

You are a Market Intelligence Analyst with deep knowledge of executive hiring trends across industries. Help me identify the best-fit target companies for my career pivot.

- *Target Role / Function: [Insert role]*
- *Target Industry / Sector: [Insert industry]*
- *Location Preference: [Insert geography or "open to remote"]*
- *Decision Criteria / Constraints: [Insert must-haves + key nice-to-haves: size, stage, comp needs, hybrid/remote, travel, culture, etc.]*

Your task: *Provide a ranked list of 10–15 target companies that fit these criteria and are most relevant for this pivot.*

For each company, include:

- *Company: Name + brief profile (industry, size, stage)*
- *Why it fits: 1–2 reasons tied to my criteria and the role*
- *Recent triggers: funding, acquisitions, leadership changes, product launches, expansion, etc. (if known)*
- *Priority score (1–5): overall attractiveness to pursue first (with a short rationale)*

Then include a 3–5 sentence summary of the market opportunity: demand signals, trends, and competitive context.

Guardrails: *If you're uncertain about recent triggers, say so. Do not invent details.*

STEP 5: Test Market Opportunity Entrepreneurial Options

If your pivot includes starting something of your own, this step helps you evaluate whether the idea is worth testing—before investing significant time, money, or energy.

Instructions

- Choose one business idea to explore.
- Define who it's for and where it would operate.
- Paste that information into the prompt below.
- Use the output to decide whether this idea is worth a small, low-risk test—not a full commitment.

AI prompt: Use this Prompt for entrepreneurial pivots

You are a Market Research Consultant and Entrepreneur Advisor with 20+ years of experience helping professionals evaluate and test new business ideas. Your role is to assess the viability and testability of an entrepreneurial opportunity—not to create a full business plan.

Opportunity to Analyze: [Insert product or service idea]

Target Customer: [Who this is for... be specific]

Target Geography (optional): [US, region, global, or niche]

Your Task: Provide a clear, practical market assessment focused on whether this idea is worth pursuing next, and how it could be tested with minimal risk.

Output Structure

1. Target Buyer Snapshot

- Who the buyer is (role, situation, context)
- What triggers them to seek a solution like this

2. Core Problem & Pain

- The primary problem this idea solves
- Why existing solutions fall short or are unsatisfying

3. Buyer Value & Success Signals

- How buyers define success or value (time, money, ease, status, outcomes)
- What would make this a “yes” for them

4. Competitive Landscape (High-Level)

- Key existing solutions or alternatives (including doing nothing)
- Where this idea could realistically differentiate

5. Market Dynamics

- Overall demand trends and growth direction
- Notable shifts (technology, behavior, regulation, culture) affecting viability

6. Viability Signals & Risks

- Signs this opportunity has real potential
- Key risks, assumptions, or constraints to validate early

7. Entry Strategy & First Tests

- Suggested positioning (niche, premium, service-first, productized, etc.)
- 2–3 low-risk ways to test demand quickly (pilot offers, conversations, pre-sales)

STEP 6: Test Before You Commit

Thinking about a pivot only gets you so far. Momentum comes from action, and clarity follows from testing.

This step is about validating your direction before committing. Rather than guessing, you'll run short, low-risk experiments to learn what the work actually looks like and whether it fits you. Over a two-week cycle, test each pivot using one or both of the methods below.

Informational Interviews

Have short conversations with people already doing the work or leading in the space to understand reality, trade-offs, and impact.

Micro-Projects / Artifacts

Create small proof points—such as a one-page plan, a thought piece, or a simple deliverable—to test your interest, capability, and credibility.

You're not trying to impress or decide yet. You're gathering real input so your next move is informed, not reactive.

Exercise: Information Interviews

- Identify 5–7 people in the role, adjacent roles, or decision-makers in your target space.
- Use LinkedIn, alumni networks, professional associations, or warm introductions.
- Frame the ask clearly: you're not job-hunting, you're learning.
- Prepare 5–7 focused questions (see below).
- Keep it to 20–25 minutes, be punctual and respect their time.
- Follow up with gratitude

Sample Script for Outreach

Subject Line: Exploring [industry/role] pivot – would value 20 min of your insight

Message: *Hi [Name], I'm exploring a pivot into [industry/role], and your background in [specific area] stood out to me. I'd love to learn from your perspective on what success looks like and where leaders in this space create the most impact.*

Would you be open to a 20-minute call in the next couple of weeks? No agenda other than learning from your experience — and of course, I'll keep it brief.

Thanks in advance for considering!

Alternate Script: "Industry Curiosity" Approach

Subject line: Learning from leaders shaping [industry/role]

Message: *Hi [Name], I'm doing some deep exploration into [industry/role] as I consider where to focus my next chapter. Your work in [specific area] really caught my eye, especially [insert detail from their LinkedIn, article, or company initiative].*

I'd love to hear your perspective on what's changing in this space, where leaders are having the biggest impact, and how seasoned executives from other industries can contribute. Would you be open to a short 20-minute conversation in the next couple of weeks?

I know your time is valuable — I'll come prepared with just a few questions and would be grateful for your insight.

STEP 6: Test Before You Commit

Suggested Informational Interview Questions

Role & Success:

- “What are the top 2–3 challenges you solve in your role?”
- “How is success measured for leaders here?”

Industry Dynamics:

- “What shifts or trends are reshaping this space?”
- “Where do you see the biggest unmet needs?”

Pathways & Advice:

- “What backgrounds tend to transition successfully into this role?”
- “If you were advising someone entering today, what would you tell them to focus on in the first 90 days?”

Career Pathways & Transitions

- “What backgrounds tend to pivot successfully into this role?”
- “Have you seen executives from outside industries transition in, what helped them succeed?”
- “What’s the biggest mistake you see career changers make in this field?”

Future Outlook & Advice

- “What excites you most about the future of this field?”
- “If you could wave a magic wand, what problem in your role/industry would you solve first?”
- “What professional associations, conferences, or communities would you recommend joining?”
- “Who else do you think I should learn from to get a well-rounded view?”

Connections (optional, only if rapport is strong):

- “Is there anyone else you think I should learn from?”

After the Interview

- Send a thank-you note (mention one specific takeaway).
- Record insights (Energy / Competence Fit / Market Pull scores).
- Look for patterns across 5–7 conversations.

STEP 6: Test Before You Commit Review & Reflect

Use this page after each informational interview. The goal isn't to capture everything that was said; it's to notice what you're learning about fit.

1. Who did you speak with? Role, company, and how closely their work aligns with the pivot you're exploring.
2. What surprised you? Something you didn't expect about the work, the role, or the environment.
3. What felt energizing? Which parts of the conversation or work description sparked interest or curiosity?
4. What felt heavy or misaligned? What gave you pause, raised concerns, or confirmed what you want to avoid?
5. What patterns are emerging? Across conversations or tests, what themes are repeating?
6. How does this affect your interest level? Rate your interest in this pivot 1–5 after this conversation and briefly explain why.
7. What's the smartest next step? Continue exploring, test further, pause this path, or move toward decision.

One conversation won't decide your future—but patterns will.

STEP 6: Test Before You Commit

Exercise: Micro-Project

Step 1: Choose a Problem Type

Pick one area where you're strong and companies often struggle:

- Growth: "How do we enter X market?"
- Operations: "How do we streamline Y process?"
- Finance: "How do we cut costs or improve unit economics?"
- People: "How do we restructure talent or scale leadership?"
- Industry-Specific: "What's our risk/opportunity in [new tech, regulation, or trend]?"

Step 2: Define the Scope

- Your project should be:
- Small (5–10 hours of work max)
- Focused (one key problem, not a full business plan)
- Deliverable-driven (memo, dashboard, presentation, playbook)

Step 3: Pick the Format

- Ideas for low-risk experiments:
- 90-Day Plan: Outline what you'd do in their first 3 months.
- Audit: Review their website, sales funnel, org chart, or product messaging.
- Benchmark: Compare their approach vs. competitors.
- Playbook: Create a 1–2 page best practice guide (hiring, go-to-market, reporting).
- Thought Piece: Write a short memo on a market trend and what it means for them.

Step 4: Offer It for Feedback

Script to suggest:

"As part of exploring a pivot into [industry/role], I've been doing short 'micro-projects' to learn and add value. If useful, I'd be happy to draft a quick [audit/plan/memo] on [specific problem you discussed]. No strings attached."

STEP 6: Test Before You Commit

Step 5: Capture Evidence

After delivering, document:

- The problem you addressed
- The insight or recommendation you shared
- The reaction you received (interest, next steps, gratitude)
- Add this to an Evidence Log because it becomes a portfolio artifact you can reference later.

Micro-Project Portfolio Template

Use this page to capture each micro-project you run. Over time, this becomes your “case compendium” to showcase in interviews or networking.

Project Snapshot

Project Title / Problem Statement: _____

Date / Duration: _____

Company / Contact (if applicable): _____

The Challenge

What was the pain point or business problem you explored?





Your Approach

What did you do in 5–10 hours to create value?





The Deliverable

What artifact did you produce (audit, 90-day plan, memo, benchmark, playbook)?



The Result / Reaction

What response did you get from the company or contact?

- Interest?
- Gratitude?
- Request for more?



Transferable Takeaway

How can you reframe this project as evidence for your pivot story?



“This shows my ability to _____, which applies directly to [target industry/role] because _____.”

STEP 7: Tell a Credible Pivot Story

This step helps you explain your pivot clearly and confidently. Hiring managers don't need your full career history; they need a concise story that answers three questions: why this move, why you, and why now.

Your pivot narrative connects your past experience to their current needs, translating what you've already done into business-focused language that makes your move feel intentional, not reactive. This isn't a script; it's a flexible framework you can adapt for interviews and conversations.

Purpose of This Exercise

To create a concise, confident narrative that:

- Explains why you're pivoting without overexplaining
- Highlights transferable strengths and proof points
- Shows how your experience solves real problems in the target role
- Positions you as someone who can add value quickly

The goal is not to convince—it's to make your pivot make sense.

Template: The Pivot Narrative

1. Opening / Why Pivot Now: "I've built a career in [previous industry/role] leading [scope]. What I've realized is that my strongest skills — [top 2–3 transferable skills] — are exactly what companies in [target industry/role] need as they [solve key challenge]."

2. Proof Points / Wins: "For example, in my last role I [Challenge → Action → Result]. That experience is directly relevant to [target context]."

3. Bridge Statement: "While the industry is different, the underlying problem — [insert problem] — is the same. That's where I can create value quickly."

4. Future Focus / 90-Day View: "My plan in the first 90 days would be to [quick win #1] and [quick win #2], while building toward [longer-term outcome]."

Exercise: Draft Your Pivot Narrative

My transferable skills are: _____

The business problems I solve are: _____

My proof story (CAR: Challenge–Action–Result): _____

Bridge Statement: "Although the industry is different, the problem of _____ is the same, and

I bring _____ to solve it."

My 90-Day View: _____

STEP 7: Tell a Credible Pivot Story

Example Narratives

Example 1 – Operations Exec → Healthcare SaaS

"I've spent 15 years leading operations in financial services, where compliance and risk management were non-negotiable. My expertise is simplifying complexity — I led a team that cut reporting time by 40% while staying audit-proof.

Healthcare SaaS faces a similar challenge: balancing speed with regulatory rigor. While I haven't been in healthcare tech, I know how to build systems that scale responsibly. In fact, my first 90 days would focus on aligning reporting workflows with compliance needs while reducing bottlenecks."

Example 2 – Marketing VP → Climate Tech

"My career has been about helping SaaS companies scale go-to-market from \$20M to \$100M. I know how to identify the right customer, lower acquisition costs, and build partner channels.

The climate tech space is facing the exact same issue — breakthrough products, but a noisy market and long sales cycles. That's where I can help. In my first 90 days, I'd focus on clarifying the ICP, tightening messaging, and piloting 2–3 quick wins in partner acquisition."

STEP 7: Tell a Credible Pivot Story

Bridge Statement Library

Use these to connect the dots for your audience. Swap in your context to make them your own.

General / Cross-Industry

- *“Although the industries are different, the core challenge of [problem] is the same, and that’s exactly what I’ve solved repeatedly.”*
- *“The tools may change, but the leadership principles; building teams, aligning strategy, and driving measurable outcomes — are universal.”*
- *“In both [past industry] and [target industry], success comes down to solving [shared business problem]. That’s where my experience translates directly.”*

Operations / Efficiency Focus

- *“In financial services, I learned how to build systems that scale without breaking. Healthcare SaaS faces that same balance of growth and compliance.”*
- *“I’ve led operational turnarounds where complexity created bottlenecks; exactly the type of challenge many [target industry] firms are now facing.”*

Growth / Revenue Focus

- *“My track record is scaling revenue from X to Y by refining go-to-market strategy. That playbook is equally relevant in [target industry], where the core issue is customer acquisition and retention.”*
- *“While the product differs, the growth levers are the same: reduce acquisition cost, improve retention, and expand partnerships.”*

Innovation / Change Focus

- *“I’ve guided teams through disruptive change, whether it was new regulation, new tech, or new markets. [Target industry] is in a similar inflection point, and that’s where I add value.”*
- *“The common thread is leading people through uncertainty, and I know how to make change stick.”*

People & Culture Focus

- *“Regardless of industry, the biggest driver of results is people. I’ve built and retained high-performing teams in tough conditions, exactly what [target industry] organizations need as they scale.”*

STEP 8: Align Your Professional Brand

A pivot doesn't work unless your brand tells the same story everywhere. This step helps you align how you're perceived; across LinkedIn, your resume, and references, with where you're headed next.

The goal isn't reinvention. It's translation. You're updating your language so decision-makers can quickly see how your experience fits their current needs.

Purpose

A career pivot only works if your brand signals (such as on LinkedIn, resume, portfolio, and references) tell a clear, consistent story. Your goal is to translate who you are into language your target market immediately recognizes and values.

Instruction & Examples

1. LinkedIn Headline Structure

Formula: Function | Outcomes | Domain/Stage

Example 1: Growth Leader | Scaled SaaS from \$20M → \$100M | Customer Retention & GTM Strategy

Example 2: Operations Executive | P&L Leadership | Driving Scale in Regulated Industries

💡 **Tip:** Write your headline for the person deciding whether to click, not for your past employer. Avoid "Seeking New Opportunities." Position yourself as a solution to problems they already have.

2. About Section (3-Part Formula)

Value Themes: "I help organizations achieve [X, Y, Z]."

Proof Stories: Short CAR examples (Challenge–Action–Result).

Call to Action: "I'm passionate about [industry/mission] and interested in conversations with leaders tackling [problem]."

Example:

"I drive scale and efficiency in growth-stage companies. Over 15 years, I've helped teams cut costs by 20%, launch new markets in Europe and APAC, and build high-trust cultures. My passion is guiding organizations through inflection points; whether that's hypergrowth or transformation. If you're building in [target industry], let's connect."

3. Resume Refresh

- Shift from responsibilities → results.
- Use business-first language: revenue ↑, costs ↓, risk ↓, speed ↑.
- Front-load transferable wins (don't bury them).
- Add an "Executive Profile" section at the top with pivot language.
- Align titles and bullets to the target role language where appropriate (without misrepresenting your role).

4. References / Sponsors

- Identify 2–3 people who can speak to your adaptability, judgment, and ability to create value in new contexts.
- Prep them with 1–2 sentences from your pivot narrative so they reinforce the same story.

STEP 8: Align Your Professional Brand

Exercise 1: Draft Your LinkedIn Headline

Formula: [Function] | [Key Outcomes] | [Target Industry/Stage]

 _____

Exercise 2: Craft Your Proof Story (for About & Resume)

Challenge: _____

Action: _____

Result: _____

Now shorten to 2–3 sentences:

 _____

Exercise 3: Identify Your Sponsors

Sponsor #1: _____ (What will they reinforce?)

Sponsor #2: _____

Sponsor #3: _____

STEP 9: Understand Your Financial Runway

Understanding your financial runway helps you plan your pivot with intention, not anxiety. It sets clear boundaries so you can move forward responsibly.

Key Considerations

1. Income & Runway

- Severance: Lump sum or paid out over time? Does it cover benefits (healthcare, retirement contributions)?
- Unemployment benefits: Am I eligible, and how much will I receive monthly?
- Other income sources: Spouse/partner income, consulting, investments, rental, etc.
- Monthly expenses: The baseline you must cover.

2. Risk Posture

- Conservative: Use severance as a bridge while landing a similar role before pivoting.
- Moderate: Use severance as “runway capital” to explore a pivot part-time while securing income.
- Bold: Treat severance as a “launch fund” to dedicate 100% effort to a pivot.

3. Tradeoffs & Realities

- Cash flow vs. equity potential
- Shorter runway vs. faster pivot learning
- Insurance/benefits coverage post-layoff (COBRA, marketplace, spouse’s plan)
- Market timing — is this a hiring season or a lull?

Exercise 1: Risk Profile Self-Check

Circle the one that resonates most:

- “I want to land as quickly as possible before severance runs out.”
- “I’ll use severance as a cushion while I test a pivot part-time.”
- “I’ll treat severance as my start-up fund to fully pursue a new direction.”

Exercise 2: My Pivot Funding Plan

- Severance covers me until: _____
- My Minimum Viable Compensation = \$ _____
- Tradeoffs I’m willing to make: _____ for _____ months/years
- Backup Plan if income doesn’t arrive by Month _____

STEP 9: Understand Your Financial Runway

Exercise 3: Runway Calculator (With Severance)

Step 1 – Monthly Expenses

Housing: _____

Utilities: _____

Food & Living: _____

Insurance/Healthcare: _____

Debt/Loans: _____

Other: _____

Total Monthly Expenses = \$_____

Step 2 – Cushion Sources

Severance Package (total): _____

Cash Savings: _____

Investments (liquid): _____

Unemployment Benefits (monthly × months eligible): _____

Other Income Sources: _____

Total Cushion = \$_____

Step 3 – Calculate Runway

Runway = Cushion ÷ Monthly Expenses = _____ months

“A severance package isn’t just a safety net — it’s a springboard. The clearer you are on how long it lasts, the bolder and more strategic you can be in your pivot.”

STEP 10: Choose Your Direction

You've explored, tested, and reflected. This step helps you decide where to focus next; and where not to spend your energy right now. You are choosing direction, not locking in your future.

Step 1: Sense Check

For each pivot, answer these three yes/no questions:

- Does this align with what matters most to me now?
- Do I feel genuine energy or curiosity about pursuing it further?
- Is there evidence of real market opportunity?

If you answer yes to all three, that's a strong sign

Step 2: Decide the Path

For each pivot, choose one:

- GO: This path shows strong alignment, energy, and evidence. I'm ready to focus here next.
- PARK: This path has potential, but timing or readiness isn't right. I'll revisit it later... intentionally.
- RELEASE: This path doesn't fit. I'm closing the loop and redirecting my attention.

Pivot A _____: Go Park Release

Pivot B _____: Go Park Release

Pivot C _____: Go Park Release

Step 3: Evidence Check (Lightweight, Optional)

For the pivot you marked GO, answer briefly:

- What evidence supports this choice? (skills, interviews, tests, demand)
- What risks am I aware of, and accept?

Reflection

Choose one question to answer:

- Which option feels most alive right now?
- Which decision gives me a sense of relief or focus?
- What am I no longer willing to overthink?

STEP 11: Turn Direction Into Action

You've made a decision. This step is about turning that choice into focused, intentional action. Rather than doing everything at once, you'll identify the specific moves that matter most right now so your energy goes toward progress, not noise.

Purpose

Now that you've chosen your pivot path, it's time to build traction.

Think of this as a focused execution phase. A strong go-forward strategy is built on three elements:

- Pipeline: Visibility with the right companies
- Outreach: Conversations with the right people
- Proof: Tangible examples of how you create value

The goal isn't volume—it's momentum in the right direction.

Key Components

1. Target Pipeline: Quality matters more than quantity.
 - 25–50 target companies aligned with your pivot thesis.
 - Track meaningful triggers such as funding, expansion, leadership changes, or acquisitions
2. Weekly Cadence: Consistency matters more than perfection.
 - 10 targeted outreaches (LinkedIn, email, referrals).
 - 4 live conversations (informational, advisory, interviews).
 - 1 proof artifact (memo, 90-day plan, LinkedIn post, short, thought piece).
3. Branding in Action: You're showing how you think... not selling yourself.
 - Share insights relevant to your target industry on LinkedIn
 - Participate selectively in industry groups, podcasts, or associations
 - Use micro-projects or artifacts as visible proof of expertise

Example: One Week in Action

- Outreach: Connected with a VP of Operations at GreenTech through an alumni network; emailed a COO at a healthcare SaaS company.
- Conversations: Informational call with an ex-colleague in the energy sector; coffee meeting with a recruiter.
- Proof Artifact: Shared a LinkedIn post: "3 Lessons SaaS Can Borrow from Healthcare Compliance."
- Result: Received a warm introduction to a hiring manager at CleanGrid Tech

STEP 12: Interview With Confidence

Pivot interviews aren't about proving you're capable—they're about reducing perceived risk. This step helps you show hiring teams that your experience translates, your gaps are understood, and you can create value quickly.

Interviews during a pivot aren't about proving competence—they're about reducing perceived risk.

Your role in a pivot interview is to:

- Translate past wins into the new context
- Address gaps directly and confidently
- Show how you'll create impact quickly

Key Elements of a Strong Pivot Interview

1. Bridge Gaps Early

- Don't wait for concerns to surface—address them proactively and matter-of-factly.

Example bridge:

"While I haven't been in healthcare tech, I've led compliance-heavy ops in financial services; the same balance of growth and regulation."

2. Reframe Transferable Wins

- Always connect past accomplishments to their pain points and anchor the story to their problem, not your past title.

Example:

"I scaled a sales team from \$20M to \$100M ARR. Different product, same challenge: getting ICP clarity and reducing CAC."

3. Show a 90-Day Plan

- Hiring leaders want confidence that you'll ramp quickly. Showing a roadmap reduces that fear.

Example outline:

- 30 Days: Absorb org, validate metrics, build trust.
- 60 Days: Align operating cadence, ship quick win.
- 90 Days: Deliver measurable result, propose next-quarter roadmap.

4. Prepare CAR (Challenge–Action–Result) Stories.

Pivot interviews need crisp proof points. Prepare 4–6 CAR stories you can adapt across questions.

Example CAR:

- Challenge: "Customer churn was at 28% in our SaaS platform."
- Action: "I built a retention task force, mapped customer journey, and launched new onboarding."
- Result: "Churn dropped to 14% in six months."

STEP 12: Interview With Confidence

5. Handle “Weak Spots” with Poise

If asked about gaps:

“That’s fair. I haven’t led product launches in this space. What I have done is lead GTM in a parallel industry with similar buying cycles and regulatory complexity. That experience shortens my learning curve here.”

Exercise: Interview Prep Grid: Fill this out for your primary pivot so your answers stay consistent, concise, and credible.

Likely Question My Pivot Response CAR Story to Back It Up

- “Why pivot to this industry?”
- “What qualifies you for this role?”
- “What would you do in your first 90 days?”
- “Where are your blind spots?”

Example Narrative: “Why This Pivot?”

“I’ve spent 12 years building operational systems in high-compliance environments. What draws me to [target industry] is a familiar challenge: balancing growth with regulatory rigor. My proof is a turnaround I led in finance ops: reduced audit risk by 80% while improving reporting speed. That’s the same muscle I’d flex here.”

Pivot Interview Question Bank (with Model Answers)

1. “Why are you pivoting now?”

“I’ve reached a point where I want to apply my strongest skills: leading transformation and scaling teams in an industry where those capabilities are especially needed right now. While the context is new, the challenges are familiar: aligning strategy, building durable processes, and delivering measurable results. This pivot lets me do what I do best in a space where the impact is meaningful.”

2. “You don’t have direct industry experience. Why should we take the risk?”

“That’s fair—and it’s also where I add value. I bring pattern recognition from another regulated industry and a track record of delivering results under similar constraints. In finance, I reduced audit risk by 80%. The specifics here are different, but the leadership approach is the same. That’s how I ramp quickly and deliver early wins.”

STEP 12: Interview With Confidence

3. "What would you do in your first 90 days?"

"The first 30 days would focus on listening: understanding the culture, key stakeholders, and the metrics that matter most. By 60 days, I'd deliver a visible quick win to build trust and momentum. By 90 days, I'd present a forward roadmap aligned to your strategic priorities."

4. "What skills are you missing for this role?"

"I haven't yet worked directly with [specific tool/process]. What gives me confidence is how quickly I've closed gaps before. In a prior turnaround, I entered a new domain and within six months delivered measurable results. I'd apply the same disciplined learning approach here."

5. "How do you know this pivot is the right move for you?"

"I didn't decide this in isolation. I tested it through conversations, micro-projects, and market research. Each step reinforced that my skills align with the challenges here, and that the work genuinely energizes me. That combination is what tells me this is the right move."

6. "Why not stay in your current lane?"

"I could; and I've been successful there. But the problems I solve aren't limited to one sector. What excites me now is applying those same capabilities in [target industry], where the need is immediate and the impact is even greater."

7. "Tell me about a time you had to adapt quickly in a new environment."

"When I moved into [previous role/industry], I had to establish credibility quickly. I focused on learning the industry language while anchoring to universal drivers: growth, cost, and risk. Within 90 days, I delivered [specific result]. That adaptability is exactly how I'd approach this role."

8. "What if you realize this industry isn't for you?"

"I've already reduced that risk by testing the work through conversations and hands-on exploration. I'm confident this direction fits. And even if conditions change, the capabilities I'm building; leadership, execution, and strategy are durable and transferable."

9. "How do you plan to close your knowledge gaps?"

"I've identified three priority gaps: [insert gaps]. I'm already addressing them through [courses, mentors, hands-on work]. I've closed gaps like this before while still delivering results, and I know how to balance learning with execution."

10. "Why you, and why now?"

"Because I bring proven experience scaling organizations and a fresh perspective from outside the industry. And because your company is at an inflection point where those skills matter most. That combination allows me to add value quickly—and see opportunities others might miss."

These examples aren't scripts to memorize. Use them as reference points and adapt them to sound like you.

STEP 13: Offers & Negotiation

An offer is an invitation, not an obligation. This step helps you assess the full picture, negotiate with confidence, and choose an outcome that supports your long-term goals.

How to Think About the Offer

A strong offer isn't just about compensation; it's about alignment, risk, and long-term fit. Use the considerations below to evaluate the full picture and negotiate where it matters most.

1. Look at the Full Package

Go beyond base salary and consider total value, including:

- Base salary
- Bonus or short-term incentives
- Equity or stock options
- Benefits (healthcare, retirement, PTO)
- Professional development budget

Often, flexibility or upside matters more than the headline number.

2. Reduce Risk For Both Sides

If there's uncertainty around your pivot, negotiate terms that create clarity and confidence on both sides, such as:

- Milestone-based bonuses: Compensation tied to early wins
- Trial or advisory period: A paid project or 90-day contract before full conversion
- Accelerated vesting: Equity that rewards commitment through the transition
- Defined success metrics: Agreement upfront on how performance will be measured

These structures protect you while also easing employer concerns.

3. Understand Your Tradeoffs & Leverage

Before negotiating, be clear on:

- Where you're willing to trade (base vs. equity, flexibility, scope, or title)
- Which elements matter most at this stage of your life
- What leverage you have—competing offers, financial runway, consulting or advisory work

Leverage isn't about pressure. It's about knowing your options and negotiating from a place of clarity.

STEP 14: Exiting with Intention

How you leave matters as much as where you're going. This step focuses on planning a professional exit that reflects your values and supports your next chapter.

Framework for a Clean Exit

1. Prepare Before Announcing

Before saying anything, get your ducks in a row:

- Confirm your new offer in writing
- Review your contract for notice period, non-compete clauses, or bonus considerations
- Draft a simple transition plan (key projects, responsibilities, contacts)

Preparation allows you to lead the conversation calmly.

2. Notify Leadership First

- Speak with your manager before informing your team
- Be direct, respectful, and concise
- Focus on timing and transition—not justification

This sets the tone for everything that follows.

3. Submit a Formal Resignation

- Keep the message professional and positive
- No need to explain frustrations or list reasons
- Express appreciation and confirm transition details

Less explanation usually leads to a cleaner exit.

4. Transition Smoothly

- Document projects, deadlines, and key contacts
- Offer support in onboarding or knowledge transfer
- Finish strong—people remember how you leave

This is where reputation is reinforced.

5. Leave on a High Note

- Thank key colleagues personally
- Share personal contact information if appropriate
- Keep exit interviews constructive, not critical

Your final impression often lasts the longest.

STEP 14: Exit with Intention

How you leave matters as much as how you arrive. A professional, gracious exit preserves your reputation, maintains relationships, and sets the stage for future collaborations.

Sample Resignation Letter

[Your Name]
[Your Address]
[City, State, Zip]
[Email / Phone]
[Date]
[Manager's Name]
[Company Name]

Dear [Manager's Name],

Please accept this letter as formal notice of my resignation from [Company Name], effective [Last Working Day, typically two weeks from today unless otherwise required].

I am grateful for the opportunities I've had to grow and contribute during my time here. Working with you and the team has been a privilege, and I've learned skills I will carry forward in my career.

I am committed to ensuring a smooth transition. I will complete my current projects and prepare documentation to support whoever takes over my responsibilities. Please let me know how else I can assist during this period.

Thank you again for the support and opportunities. I look forward to staying in touch and wish [Company Name] continued success.

Sincerely,
[Your Name]

Sample Thank-You Note to Colleagues

Hi Team,

As I prepare to move on from [Company], I want to thank you for the collaboration, support, and laughs we've shared. I'm proud of what we accomplished together, especially [highlight a project].

I'd love to stay in touch. You can reach me at [personal email] or connect with me on LinkedIn [link].

Wishing you all the best in what's ahead.

– [Your Name]

STEP 15: Early Wins & Credibility

The first 90 days set the tone for everything that follows. This step helps you focus on early wins, build credibility quickly, and create momentum without trying to do everything at once.

Your Focus

In your first 90 days, your priorities are to:

- Learn the language and landscape
- Build trust and credibility
- Deliver early, visible results

You're not trying to prove everything at once—just enough to establish momentum.

First 30 Days: Listen & Learn

Focus on understanding before changing anything.

- Learn the industry language: acronyms, trends, key players
- Map the business model: how the company makes money and where the levers are
- Build relationships: meet your team, cross-functional partners, and key stakeholders
- Validate metrics: understand which KPIs matter most and how they're tracked

Deliverable: A brief Listening Tour Summary (1–2 pages) capturing key insights and themes.

Next 30 Days (Day 31–60): Align & Act

Begin translating insight into action.

- Refine your 90-day plan with input from your manager
- Identify quick wins: improve a process, launch a small initiative, or simplify reporting
- Share perspective: apply lessons from prior roles to current challenges
- Build trust signals: ask for feedback early and adjust accordingly

Deliverable: A short memo or presentation outlining early wins and learnings.

Final 30 Days (Day 61–90): Deliver & Demonstrate

Solidify credibility through results.

- Deliver a measurable win tied to revenue, cost, risk, or speed
- Propose a 6–12 month roadmap informed by early insights
- Strengthen credibility: colleagues should see you as someone who understands the business
- Develop sponsors: confirm at least two leaders who will advocate for you internally

Deliverable: A concise 90-Day Report summarizing wins, insights, and next steps.

Early momentum comes from thoughtful action—
not rushing to prove yourself.

STEP 16: Protecting Optionality

A smart pivot includes a backup plan. Contingency planning isn't pessimism—it's risk management. Knowing your alternatives keeps you calm, confident, and in a stronger position when making decisions or negotiating.

Framework: Protecting Optionality During a Pivot

1. Keep a Secondary Path Warm

- Maintain one alternative pivot path (e.g., an adjacent industry or consulting route).
- Allocate some ongoing attention to this lane such as light networking, occasional outreach, or content so it remains viable without pulling focus from your primary path.

This is about optionality, not divided commitment.

2. Keep Advisory or Fractional Options Open

- Cultivate relationships that could turn into short-term or project-based work.

These options can extend runway, reduce pressure, and provide real-world testing in new industries.

3. Define Your Income Floor

- Be clear on your minimum viable income and when you would accept interim or bridge work.
- Example: "If I don't see traction by Month 6, I'll temporarily shift focus to fractional consulting to stabilize income while continuing my search."

Clarity here prevents reactive decisions later.

4. Set Decision Checkpoints

- Establish review points at 3, 6, and 12 months.
- At each checkpoint, ask:
- Is this path gaining enough traction to justify continued focus?

Decisions made calmly beat decisions made under pressure.

5. Watch the Signals

- Positive indicators: referrals, repeat conversations, proof projects turning into roles.
- Signals to reassess: declining engagement, lack of response to proof artifacts, offers consistently below your defined threshold.

Signals inform direction—they're not judgments.

Bonus:

Consulting as a Strategic Bridge

Consulting allows you to move forward without waiting for permission. Used intentionally, it can test—fit a new direction, build credibility, and strengthen your position as opportunities emerge.

Consulting as a Strategic Bridge

Consulting can be a powerful way to move forward while exploring a pivot, if it's done intentionally.

Used well, consulting can:

- Extend your financial runway
- Create proof points in a new industry
- Build relationships with potential future employers
- Let you test the work before committing fully

The key is clarity around scope, positioning, and boundaries.

Key Considerations

1. Positioning: Be clear about the value you offer.

- What problem do you solve best? (efficiency, scaling, compliance, talent strategy, etc.)
- Who is most likely to hire you? (CEO, COO, VP People, PE/VC, founder)
- Which industries can you translate into quickly using your existing skills?

2. Service Model Options: Choose a model that fits your goals and capacity.

- Fractional executive: part-time leadership (e.g., Fractional COO/CMO)
- Advisory: strategy sessions or board-level guidance
- Project-based: defined deliverables (process redesign, GTM audit, compliance review)
- Retainer: ongoing access for a set number of hours per month

3. What to Weigh: Consulting offers flexibility and leverage—but it's not neutral.

- Benefits: income flexibility, credibility, expanded network
- Considerations: reduced job-search focus, risk of being seen as “only” a consultant, income variability
- Awareness, not avoidance, is the goal.

“A pivot isn't a single be; it's a portfolio of options.”

Bonus: Consulting as a Strategic Bridge

Framework

Clarify Your Anchor Offering

One clear problem → one clear outcome.

Example: "I help scaling startups build operational processes that reduce costs by 20%."

Package It Simply

Keep offers easy to understand:

- Project vs. retainer
- Or simple tiered options

Set Clear Boundaries

- Define your maximum weekly time commitment (e.g., 20 hours)
- Protect time for your primary pivot strategy

Build Social Proof

- Create 1–2 case studies (micro-projects count)
- Share insights publicly to establish credibility in the target space

Leverage for the Pivot

- Turn consulting clients into references
- Use projects as proof artifacts in interviews
- Keep consulting optionality—even if you accept a full-time role

Exercise: Consulting Readiness Check

Purpose: Use this exercise to clarify whether consulting can be an intentional bridge during your pivot.

- My Anchor Offering (the problem I solve best): _____
- My Ideal Buyer (role or decision-maker): _____
- My Service Model (fractional, advisory, project-based, retainer): _____
- My Availability (hours per week I'm willing to allocate): _____
- My Pricing (directional range, not final): _____

First 3 Target Companies or Clients:

1. _____
2. _____
3. _____

Bonus: Consulting as a Strategic Bridge

These packages are examples, not prescriptions. Use them to shape offers that fit your strengths, availability, and pivot goals.

Sample Consulting Packages

Use these templates, adapt deliverables, pricing, and scope to your pivot industry.

Bronze: Advisory Access (Advisory Access)

What it is: High-level guidance without day-to-day execution.

Includes:

- Two monthly strategy sessions
- Asynchronous support for quick questions
- Feedback on materials (decks, plans, messaging)

Best for: Founders or executives who want senior perspective without a heavy lift.

Example pricing: \$1,500–\$3,000/month

Scope note: Advisory only; no execution ownership.

Silver: Project-Based Consulting (Mid-Level Engagement)

What it is: A defined engagement with clear outcomes.

Includes:

- Discovery call and focused assessment
- One core deliverable (audit, 90-day plan, playbook, benchmark analysis)
- 2–3 check-in calls
- Final debrief with recommendations

Best for: Teams needing a specific solution or proof-of-concept.

Example pricing: \$5,000–\$15,000 per project

Scope note: Project-based with a defined end date.

Gold: Fractional Executive

What it is: Embedded leadership without a full-time hire.

Includes:

- 10–20 hours per week of hands-on leadership
- Ownership of a defined function (Ops, Marketing, Finance, etc.)
- Team coaching and mentorship
- Strategic planning with execution oversight

Best for: Startups or scaling companies not ready for a full-time executive.

Example pricing: \$8,000–\$20,000/month (based on scope and hours)

Scope note: This is a defined part-time leadership role with agreed scope and hours; additional work is scoped separately.

Bonus: Consulting as a Strategic Bridge

Red Flags

Red Flags to Watch For (Consulting During a Pivot)

Consulting can be a powerful bridge, but only when the engagement is healthy. These signals help you spot misalignment early and protect your time, energy, and credibility.

This isn't about being rigid. It's about being intentional.

Client / Opportunity Red Flags

- Vague scope or moving targets: If the problem keeps changing, so will your workload.
- "Can you just..." language: Frequent small requests outside scope usually signal future boundary issues.
- Urgency without clarity: Pressure to start immediately without defined outcomes or expectations.
- Unclear decision-maker: If no one owns the decision, progress will stall; and you'll carry the frustration.
- Budget discomfort: Hesitation or resistance around pricing often predicts friction later.

Engagement Structure Red Flags

- No agreement on success metrics: If "good work" isn't defined, it will be judged subjectively.
- Unlimited access expectations: Lack of boundaries around time, availability, or response speed.
- Execution creep: Advisory or strategic work slowly turning into hands-on execution without adjustment.
- Resistance to documentation: Reluctance to put scope, deliverables, or timelines in writing.

Pivot-Specific Red Flags

- Consuming all your time: Leaves no space for your primary pivot strategy.
- Doesn't build transferable proof: The work doesn't strengthen your story or credibility in your target direction.
- Reinforces the wrong identity: Positions you as something you don't want to be known for long-term.
- Feels draining, not challenging: Occasional stretch is good; chronic exhaustion is not.

Reflection Check (Use Before Saying Yes)

Answer these honestly:

- Does this engagement support or distract from my primary pivot?
- Am I clear on scope, time, and outcomes?
- Will this work strengthen my future positioning?

If more than one answer feels shaky, pause before proceeding.

What to Do If You Spot Red Flags

- Clarify scope and success metrics before starting
- Reset boundaries early—before patterns form
- Renegotiate terms or adjust expectations
- Walk away if alignment can't be reached

Walking away from the wrong work protects space for the right opportunity.

Bonus: Consulting as a Strategic Bridge Green Flags

Green Flags to Look For (Consulting During a Pivot)

Healthy consulting engagements do more than pay the bills, they build confidence, credibility, and optionality. These signals suggest an opportunity is aligned with your goals and worth pursuing. This isn't about perfection. It's about fit.

Client / Opportunity Green Flags

- Clear problem definition: The client can clearly articulate what they need help with and why it matters now.
- Defined decision-maker: You know who owns the outcome and has authority to move forward.
- Respect for expertise: They value your perspective and ask thoughtful questions, rather than prescribing solutions.
- Comfort with pricing: Pricing is discussed openly and professionally, without defensiveness or pressure.
- Realistic urgency: There's momentum, but not chaos.

Engagement Structure Green Flags

- Clear scope and deliverables: Everyone agrees on what success looks like.
- Boundaries are welcomed: Time, availability, and priorities are respected.
- Documentation is encouraged: The client wants clarity in writing.
- Appropriate access: You're brought into the right conversations, not all conversations.

Pivot-Supporting Green Flags

- Builds transferable proof: The work strengthens your credibility in your target direction.
- Expands your network intentionally: You're exposed to leaders, partners, or teams relevant to your pivot.
- Energizing challenge: The work stretches you without draining you.
- Option-creating outcomes: The engagement could lead to referrals, repeat work, or full-time interest.

Reflection Check (Before Saying Yes)

Ask yourself:

- Does this move me closer to where I want to go?
- Will this engagement strengthen my story and positioning?
- Do I feel respected and clear; not rushed or uncertain?

If the answers feel grounded and positive, that's a strong signal.

The right work builds momentum while it builds income.



Congratulations!

You're Ready to Move Forward

You're Ready to Move Forward

You've worked through the steps, asked the hard questions, and built a plan that's genuinely yours.

By now, you have:

- Clarity on your why and non-negotiables
- A clear view of your transferable skills
- Market insight and low-risk experiments to test fit
- A pivot narrative that translates past wins into future value
- A refreshed personal brand that supports where you're headed
- A realistic understanding of your financial runway and risk posture
- A decision framework to guide your choice
- A focused go-forward strategy for outreach, conversations, and proof
- Confidence navigating interviews, negotiation, and a professional exit
- A roadmap for your first 90 days—and what comes next
- Optionality through contingency planning (and consulting, if you choose)

You're no longer guessing. You're choosing.

Final Encouragement

A pivot isn't a single leap; it's a series of intentional moves. You've already done the hardest part: building clarity and direction.

Now the work is simple:

- Take consistent weekly action
- Stay curious, not desperate
- Trust your skills; they're more transferable than you think

Remember: you're not starting over, you're starting smarter.

Resources

The resources in this section are here to support your thinking—not replace it. Each book, tool, or podcast was chosen to deepen insight, sharpen decisions, or help you move forward with more confidence. Use what's useful, skip what's not, and return to this section as your pivot evolves.

STEP 1: Current Role Reality Check

- Book: *Designing Your Life* by Bill Burnett & Dave Evans (using experimentation to clarify direction)
- Book: *Man's Search for Meaning* by Viktor Frankl (values, purpose, and meaning through change)
- Book: *Essentialism* by Greg McKeown (identifying what truly matters and eliminating the rest)
- Tool: Values Card Sort by Think2Perform or Brené Brown (clarifying core values and priorities)
- Podcast: *The Knowledge Project* by Shane Parrish (decision-making, values, and long-term thinking)
- Podcast: *On Purpose* by Jay Shetty (purpose-driven reflection without career hype)

STEP 2: Set Your Decision Criteria

- Book: *Essentialism* by Greg McKeown (separating must-haves from noise)
- Book: *Four Thousand Weeks* by Oliver Burkeman (time, limits, and choosing intentionally)
- Book: *The Paradox of Choice* by Barry Schwartz (decision fatigue and making better tradeoffs)
- Tool: Decision Matrix (simple weighted scoring for must-haves vs. nice-to-haves)
- Tool: Values Card Sort by Think2Perform or Brené Brown (clarifying non-negotiables)
- Podcast: *Coaching for Leaders* (episodes on boundaries, priorities, and decision clarity)

Step 3: Identify & Research

- Book: *Designing Your Life* by Bill Burnett & Dave Evans (career exploration through low-risk experiments, not guessing)
- Book: *Range* by David Epstein (why transferable skills matter more than linear paths)
- Book: *Working Identity* by Herminia Ibarra (identity shifts, testing roles, and redefining yourself through action)
- Tool: ChatGPT (used as a career strategist for pattern analysis, role clustering, and market-fit exploration)
- Tool: LinkedIn Career Explorer & Job Insights (identify adjacent roles, skills overlap, and real-world career paths)
- Podcast: *The Knowledge Project* (decision-making, second-order thinking, and avoiding blind spots)

STEP 4: Identify Transferable Skills & Gaps

- Book: *Range* by David Epstein (how broad experience creates advantage across domains)
- Book: *What Color Is Your Parachute?* by Richard N. Bolles (skills-based career analysis and transferable strengths)
- Book: *StrengthsFinder 2.0* by Tom Rath (identifying and articulating core strengths in practical terms)
- Tool: O*NET Online (map skills across roles, industries, and functions)
- Tool: LinkedIn Skills & Job Insights (see how your skills translate into adjacent roles)
- Podcast: *Coaching for Leaders* (episodes on strengths, leadership capability, and career growth)

Resources

STEP 5: Research Market Opportunities

- Book: *The Signals Are Talking* by Amy Webb (spotting early signals, trends, and inflection points before they're obvious)
- Book: *Good Strategy Bad Strategy* by Richard Rumelt (understanding what real opportunity looks like vs. noise)
- Tool: U.S. Bureau of Labor Statistics Occupational Outlook Handbook (job growth, demand trends, and outlook by role)
- Tool: LinkedIn Job Trends & Hiring Insights (real-time demand, skills gaps, and hiring velocity)
- Podcast: a16z Podcast (market shifts, technology trends, and where companies are placing bets)

STEP 6: Low-Risk Experiments

- Book: *The Lean Startup* by Eric Ries (testing assumptions quickly before making big bets)
- Book: *Testing Business Ideas* by David J. Bland & Alexander Osterwalder (practical experiments to validate ideas with minimal risk)
- Book: *Sprint* by Jake Knapp (rapid experimentation and decision-making in short cycles)
- Tool: Notion (track experiments, hypotheses, outcomes, and learnings in one place)
- Tool: Canva (quickly create proof artifacts like one-pagers, plans, or thought pieces)
- Podcast: Indie Hackers (real-world stories of testing ideas before committing)

Step 7: Tell a Credible Pivot Story

- Book: *The 2-Hour Job Search* by Steve Dalton (clear frameworks for networking language)
- Book: *The First 90 Days* by Michael Watkins (helps shape your "future focus")
- Podcast: Career Pivot with Marc Miller (stories of executives shifting fields)
- LinkedIn Learning Course: Executive Presence on Video Calls (to deliver your pivot story confidently)

STEP 8: Align Your Professional Brand

- Book: *Reputation Rules* by Daniel Diermeier (brand resilience)
- Book: *Platform* by Cynthia Johnson (personal branding in digital spaces)
- LinkedIn Learning: Executive Presence & Creating a Personal Brand
- Tool: Jobscan.co (compare resume/LinkedIn against job descriptions)
- Podcast: *Coaching for Leaders* by Dave Stachowiak (branding & leadership presence)

Step 9: Understand Your Financial Runway

- Book: *What Color Is Your Parachute?* (2025 edition — includes layoff transitions)
- Book: *Smart Women Finish Rich* by David Bach (wealth protection post-layoff)
- Tool: YNAB (You Need a Budget) — track severance usage
- Tool: CareerOneStop (careeronestop.org) — unemployment benefits info by state
- Podcast: *So Money* with Farnoosh Torabi — navigating money during career transitions

Resources

STEP 10: Choose Your Direction

- Book: *Decisive* by Chip Heath & Dan Heath (making better choices and avoiding common decision traps)
- Book: *Thinking in Bets* by Annie Duke (decision-making under uncertainty and separating outcomes from quality of choice)
- Book: *The Art of Choosing* by Sheena Iyengar (how choice overload affects confidence and commitment)
- Tool: Decision Journal (simple log to capture rationale, assumptions, and confidence at the time of choice —helps reduce regret later)
- Tool: Pre-Mortem Exercise (identify what could go wrong before committing, then mitigate proactively)
- Podcast: *Choiceology* by Katy Milkman (behavioral science behind tough decisions)

Step 11: Go Forward Strategy

- Book: *The First 90 Days* by Michael Watkins (roadmap for new roles, helpful to build your proof artifacts).
- Book: *Never Eat Alone* by Keith Ferrazzi (strategic networking).
- Tool: *Airtable* / *Trello* — for tracking outreach & pipeline.
- Tool: *Hunter.io* — find executive emails for direct outreach.
- Podcast: *Career Relaunch* by Joseph Liu — stories of pivots with tactical lessons.

Step 12: Interview Strategy

- Book: *The First 90 Days* by Michael Watkins (framework for your plan).
- Book: *Cracking the PM Interview* (even if not a PM, excellent for translating skills into structured interview answers).
- Tool: *Big Interview* (practice answering pivot-related questions).
- Podcast: *How I Built This* (for narrative inspiration and confidence in telling “why this pivot” stories).

Step 13: Offers and Negotiation

- Book: *Never Split the Difference* by Chris Voss (negotiation tactics).
- Book: *Getting More* by Stuart Diamond (practical frameworks for business/life negotiation).
- Tool: *Glassdoor* / *Levels.fyi* — market comp data.
- Tool: *PayScale* — compare offers against benchmarks.
- Podcast: *Negotiate Anything* with Kwame Christian.

Step 14: Exiting with Intention

- Book: *The Alliance* by Reid Hoffman — reframing employer/employee relationships.
- Article: *Harvard Business Review*: “How to Quit Your Job Without Burning Bridges.”
- Tool: *LinkedIn* — announce your transition with gratitude (draft a positive post to frame your move).
- Podcast: *Coaching for Leaders* — episodes on graceful exits and leadership transitions.

Additional Resources

Step 15: Early Wins & Credibility

- Book: The First 90 Days by Michael Watkins (classic roadmap — tailor to pivot context).
- Book: You're In Charge, Now What? by Thomas Neff & James Citrin (exec transitions).
- Tool: 30-60-90 Day Plan templates on Miro / Lucidchart (for visual maps).
- Podcast: HBR Women at Work — episodes on starting strong in new roles.

Step: 16 Protecting Optionality

- Book: Designing Your Life by Burnett & Evans (prototyping multiple futures).
- Book: Optionality by Richard Meadows (building choices as leverage).
- Tool: Airtable or Notion — to track pivot + backup thesis pipelines side-by-side.
- Podcast: Career Relaunch (stories of pivots, failures, and bounce-backs).

Bonus: Consulting as a Strategic Bridge

- Book: The Business of Expertise by David C. Baker (how to position & sell consulting).
- Book: Million Dollar Consulting by Alan Weiss (classic framework).
- Tool: HoneyBook / Dubsado — contracts, invoicing, client management.
- Tool: LinkedIn & Clarity.fm — for finding advisory/consulting leads.
- Podcast: Consulting Success by Michael Zipursky.

WANT MORE SUPPORT?

This playbook is meant to help you think clearly and move forward with intention. For many people, that's enough.

But if your pivot is part of a bigger life transition and you want space to think, reflect, and decide with support, coaching may be a fit.

My coaching work isn't about resumes, scripts, or checklists. It's about navigating change thoughtfully, rebuilding confidence, and making decisions that align with who you are now, not who you were five or ten years ago.

Clients come to coaching when they're standing at an inflection point and want a trusted thought partner as they figure out what's next.

If that resonates, I'd be happy to explore working together.

Learn more at: www.iamjenfort.com



iamjenfort@gmail.com
+6104571247
iamjenfort.com