The Career Transition Planner

Your 3-Month Action Timeline

This is the doing part — where the Skills Audit and Path Matcher turn into a real timeline. Fill it in a month at a time; it's meant to flex as things change.

1 3-Month Action Timeline

Month 1 — Foundation

- ☐ Update resume for target field/role — Target date: _____
- ☐ Rewrite LinkedIn headline & summary — Target date: _____
- ☐ Research 3 target employers or role types — Target date: _____
- ☐ Identify certifications or coursework needed — Target date: _____

Month 2 — Momentum

- ☐ Reach out to 5 people in your target field — Target date: _____
- ☐ Enroll in any bridge certification/course — Target date: _____
- ☐ Apply to 3–5 roles or pitch 3–5 clients — Target date: _____
- ☐ Attend one networking event or online community — Target date: _____

Month 3 — Movement

- ☐ Follow up on all applications/outreach — Target date: _____
- ☐ Complete interviews or client consultations — Target date: _____
- ☐ Negotiate offer or finalize first client agreement — Target date: _____
- ☐ Set 90-day goals for the new role or venture — Target date: _____

2 Financial Readiness Snapshot

A quick income-dip budget — know your number before you leap.

Line Item	Amount
Current monthly take-home pay	$_____
Essential monthly expenses (housing, food, insurance, debt)	$_____
Months of expenses currently saved	_____
Expected monthly income during transition (if any)	$_____
Monthly gap to cover from savings	$_____
Target savings cushion before transitioning (3–6 months expenses)	$_____

3 Target Roles & Research Checklist

Target Role / Opportunity #1

Role title & organization or client type

- ☐ Requirements confirmed (license, certification, education)
- ☐ Salary/rate range researched
- ☐ Application or pitch submitted
- ☐ Follow-up scheduled

Target Role / Opportunity #2

Role title & organization or client type

- ☐ Requirements confirmed (license, certification, education)
- ☐ Salary/rate range researched
- ☐ Application or pitch submitted
- ☐ Follow-up scheduled

Target Role / Opportunity #3

Role title & organization or client type

- [ ] Requirements confirmed (license, certification, education)
- [ ] Salary/rate range researched
- [ ] Application or pitch submitted
- [ ] Follow-up scheduled

4 Milestone Tracker

Mark each milestone as you hit it — momentum is easier to see in writing.

☐ Decided on target direction	Date:	_____
☐ Resume/LinkedIn updated	Date:	_____
☐ Financial cushion in place	Date:	_____
☐ First outreach sent	Date:	_____
☐ First interview or client conversation completed	Date:	_____
☐ Offer received or first client signed	Date:	_____
☐ Gave notice / transition date set	Date:	_____
☐ First day in new role or venture	Date:	_____