

GENERALIST WORKBOOK

REFRAME

*How Generalists Succeed
in a Changing World*

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Welcome

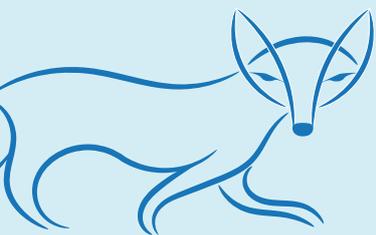
I am happy you're here.

As Generalists, we don't have the words to explain what it is we do. Lacking an adequate description means that all too often, the value we bring is defined by others. This workbook helps you flip that script by guiding you through exercises to help you understand, communicate, and create a career as a Generalist.

Designed to accompany ***Reframe: How Generalists Thrive in a Changing World***, this workbook can also be used in whatever way works best for you; with the book, independently, chronologically, or à la carte.

Please note that exercises correlate with a chapter in the book, ie Section 03 > Chapter 3. The values exercise precedes all others.

Feedback about how to improve these materials or ideas for new ones are always welcome.



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Workbook

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Generalist Overview & Values

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Developing as a Generalist



Why Generalists?

What is a Generalist?

Generalists are widely curious, creatively connecting information to ideate and test solutions, address gaps, and solve problems.

You might be a Generalist if you describe yourself as:

- Jack of All Trades
- Utility Player
- Connector
- Multifaceted
- Multi-hyphenated
- Renaissance thinker
- Strategic
- Systems thinker
- Widely curious
- Need variability
- Make disparate connections
- Frequently change jobs
- The “go-to” to get it done
- A people person
- Problem solver
- Gap filler

The Generalist Dilemma

While numerous in number and essential in every organization, Generalists are largely invisible, without a definition, title, role, credentials, or career path. While many have found their way, the lack of clarity has challenged many more, making finding a job, assessing performance, seeking promotions, and creating an intentional career path confusing and at times chaotic.

Generalists are Needed Now

Specialists have understandably dominated the way work is organized, careers are shaped, and how people are recognized, developed, and promoted. However, the demands of a fast-paced and changing world need the adaptability and core attributes that Generalists bring. Specialist expertise remains essential; yet it is only working together that Generalists and Specialists can address both current and future challenges.

We cannot afford to leave Generalist talent to the table. Generalists deserve the kind of support, direction and tools that Specialists have long had, so they can meet the demands of the time and be effective partners to Specialists. We all benefit when Generalists understand their unique contributions, confidently communicate their value and intentionally create a career they love.



Values

Why Know Your Values?

Values express our deepest-held beliefs and reflect what we hold as most important in our lives. Values inform our purpose, guide our decisions, and fuel our growth, especially in times of constant change or incomplete information.

Having clarity on priority values and what they mean helps us each understand when and why they are aligned or insulted. When our values are aligned, we thrive; when they are insulted or compromised, we feel discouraged. Our core values are not just lovely to have, but serve as the compass by which we navigate our lives.

And while discerning your core value is hard, knowing exactly what matters to you is essential. Just as each company and organization has its stated values, we each need our own.

Instructions

This exercise can be challenging and is more easily completed if you think of real world situations at work. Use the following list of values to pick two or three values that resonate. You can start with more than one and winnow to a final list using the following questions created by Brené Brown:

1. Does this value define me? (ie, deeply resonates with who I am at my core.)
2. Is this who I am at my best? (ie, does this value help you find flow? Do others see this value as you?)
3. Is this value a filter when making hard decisions? (ie, can you think of an example?)

The connection between your values and how they manifest in your work and life should be clear. For example, if you planned a successful first-ever event with a great team, you understand how that success reflects your top two values of "Creativity" and "Service." Once decided, you can just circle the two to three values that capture your reflection and answers to the above questions.

Then imagine a time when you struggled at work, in a relationship, in a team culture, or in an uncomfortable situation. Underline the value that was insulted. For example, if "Independence" is a top value, working on a closely managed and directed team with shared accountability may challenge and insult your value of having personal control to feel and do your best.



Values List

Accountability
Accuracy
Achievement
Adventure
Aesthetics
Altruism
Ambition
Ancestry
Authenticity
Authority
Autonomy
Balance
Beauty
Boldness
Bravery
Calmness
Celebration
Challenge
Cheerfulness
Citizenship
Commitment
Community
Compassion
Competence
Contentment
Contribution
Control
Cooperation
Courage
Courtesy
Creativity
Curiosity
Determination
Development
Dignity
Diligence
Diplomacy
Discretion
Dynamism
Elegance
Efficiency
Emotional Wellbeing
Empathy
Enthusiasm
Enjoyment
Equality
Excellence
Excitement
Expertise
Fairness
Faith
Family
Forgiveness
Freedom
Fun
Generosity
Grace
Gratitude
Growth
Happiness
Harmony
Health
Helping
Honesty
Hope
Honor
Humility
Humor
Impact
Independence
Influence
Ingenuity
Inquisitiveness
Intellect
Integrity
Intuition
Joy
Justice
Kindness
Knowledge
Leadership
Learning
Love
Loyalty
Mastery
Morality
Mutual Respect
Notoriety
Openness
Optimism
Order
Passion
Peace
Perseverance
Play
Pleasure
Poise
Popularity
Practicality
Prudence
Purpose
Recognition
Reputation
Relationships
Religion
Resilience
Resourcefulness
Restraint
Rigor
Self Control
Selflessness
Self Reliance
Serenity
Service
Simplicity
Skill
Social Responsibility
Spirituality
Spontaneity
Stability
Status
Strength
Success
Teamwork
Thankfulness
Thoroughness
Trustworthiness
Unity
Usefulness
Variety
Wealth
Wisdom
Zest

Instructions

Use the following optional self-assessment to discern areas of need and focus. Circle the number that most resonates in each category. Score your assessment.

Generalist Identity

How comfortable are you answering the question "What do you do?"

1. I give a confident, clear response that people find interesting and remember.
2. I have an answer, but sometimes stumble depending on who I am talking to.
3. Awkward! I provide a different answer each time.
4. I dread this question and either talk too much or give a vague reply.

Do you understand how your strengths, skills, and experiences combine to form your unique value/superpowers?

1. I know exactly how my strengths and experiences illuminate my value.
2. I notice and share some connections between my strengths and success, but don't yet have a deep understanding.
3. My strengths feel random, disconnected, and episodic.
4. It all looks like spaghetti to me.

Communication

Can you clearly explain what makes you uniquely valuable as a Generalist?

1. Strong - I confidently articulate my unique value, strengths and impact.
2. Moderate - I know my unique value, but struggle to put it into words.
3. Needs Work - I'm not sure what makes me different from other Generalists.
4. I feel lost about my value and what I bring to the table.

How comfortable are you telling your work narrative, stories and impact as a Generalist?

1. My straightforward narrative has right-sized examples for my audience.
2. I have some examples, but not sure how they relate to my Generalist value.
3. I struggle to connect my stories to my value as a Generalist.
4. Not sure I have the right stories, and if I did, I don't know how to tell them.

Environment

Do you know the kinds of challenges you are curious about and can solve?

1. I clearly understand the problems I solve best and the workplaces where I thrive.
2. I have some idea, but I need to be more specific.
3. I know I solve issues, but I can't articulate specific ones.
4. I don't know what problems I solve or for whom.

How good are you at discerning the right roles and environments for you?

1. I know precisely where Generalists thrive and target accordingly.
2. I have some ideas, but I need to research more opportunities.
3. I don't know where I fit in the job market.
4. There's no place for Generalists in today's specialized world.

Growth

How confident are you in your capacities as a Generalist?

1. I am a proud Generalist and own my diverse experience.
2. Mostly confident, but specialization is occasionally tempting.
3. 50/50, sometimes I am, other times I feel insecure.
4. Not very confident, being a Generalist has not helped me.

How confident are you in networking?

1. I know I can help solve people's problems and actively seek opportunities.
2. I'm happy to network in a room, but I avoid reaching out 1:1.
3. Makes me nervous and often dismiss or undersell myself.
4. Hate it. Never know what to say.

Add up numbers for total score. Enter here: _____

Why Look Back?

A frequent experience for Generalists is the struggle to explain what we do. Our ease in pursuing seemingly disconnected roles can be hard to codify and share. Mining our past work history for key information gives essential insights to help us understand our value. Either start with your first major role or your five most recent roles.

Role/Title: _____ _Dates: _____

Why did you take this role? How did you succeed, and why did you leave?

Role/Title: _____ _Dates: _____

Why did you take this role? How did you succeed, and why did you leave?

Role/Title: _____ Dates: _____

Why did you take this role? How did you succeed, and why did you leave?

Role/Title: _____ Dates: _____

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Role/Title: _____ Dates: _____

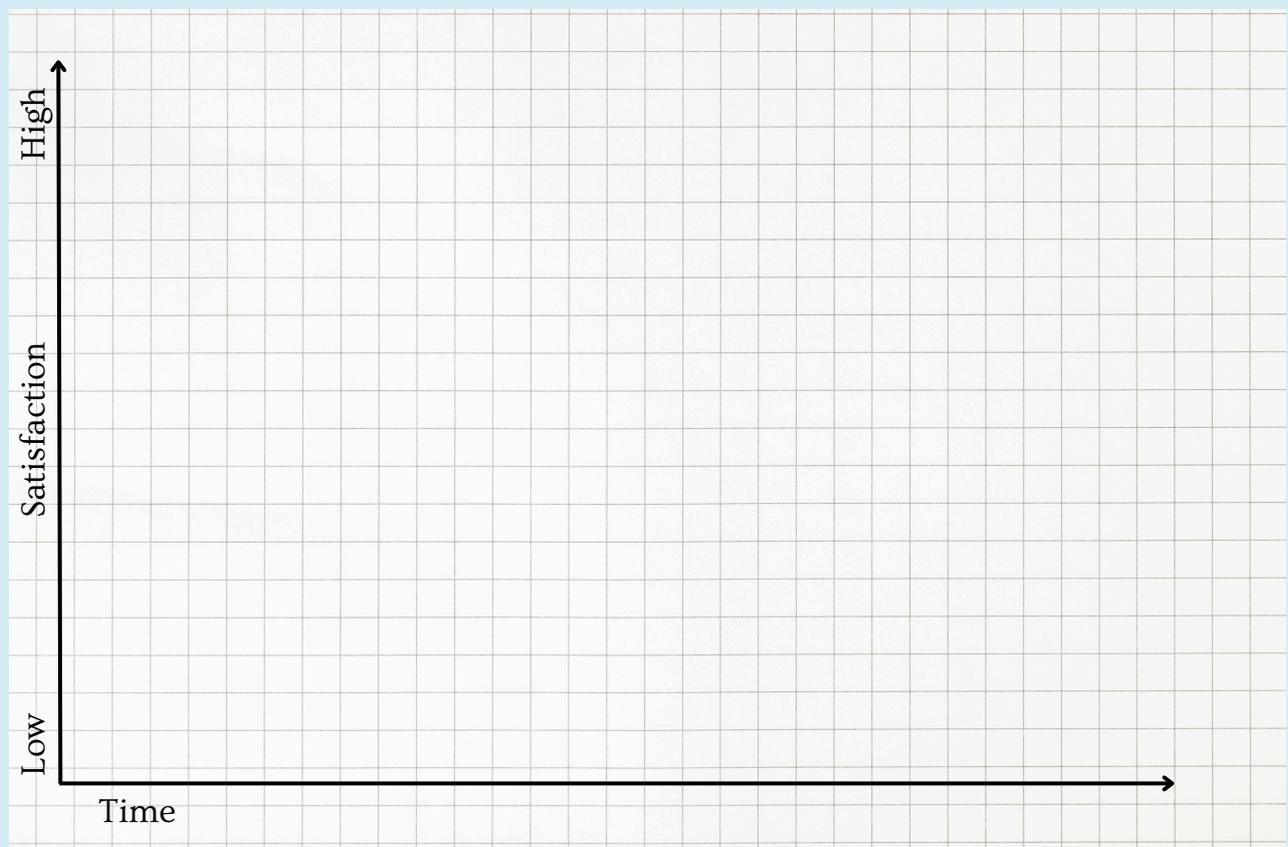
Why did you take this role? How did you succeed, and why did you leave?

02

Mapping Insights

Mapping Your Work History

Mapping your work history based on YOUR definitions of success and failure is one helpful way to understand what you need to thrive. Using the graph below, plot your main roles chronologically based on YOUR own definitions of success and satisfaction.



What insights do the highs of your graph indicate?

And the lows?

What was your favorite job and why?

03

Core Generalist Characteristics

Generalist Characteristics

Refer to Chapter 3 of Reframe for detailed explanations of each characteristic below:

Curiosity: Give examples of how you are curious and learn in your work and life?

Creative Connection: Give examples of lateral thinking and how you best solve problems?

Context: Give examples of what you need to thrive in an environment?

Why Strengths?

Just as skills define the value proposition of a Specialist, strengths do the same for Generalists. Strengths help us better understand our unique talents, give insight on how we express and direct Generalist characteristics. Generalists who know their strengths can more easily pursue excellence and discern their superpowers.



Using strengths leads to excellence



Bring out the best of you



Unique Generalist value proposition



Keys to Generalist Success

Determining Your Strengths

Though possible, discerning our strengths is hard to do alone. There are three ways to determine your strengths;

1. Ask 5-10 colleagues about what you do well. Request 3 adjectives describing you and an example of working with you.
2. Take a validated strengths-based assessment (usually for a fee) tool such as CliftonStrengths, Hogan, or VIA.
3. Guided self-reflection is also possible but best when done with an experienced coach

Feedback, such as a 360 review, can be helpful if providing insight into strengths and abilities; performance-only assessments are generally not useful for this exercise.

Strengths and Weaknesses

Knowing our strengths helps us be more successful by improving what we are already naturally good at doing. However, having strengths does not mean we do not have weaknesses. Weaknesses are often the result of ignoring our strengths (pretending we are something we are not) or areas in which we do not have a great deal of talent. Knowing where we are weak allows us to manage those areas and also gives us opportunities to partner with those who have complimentary strengths.

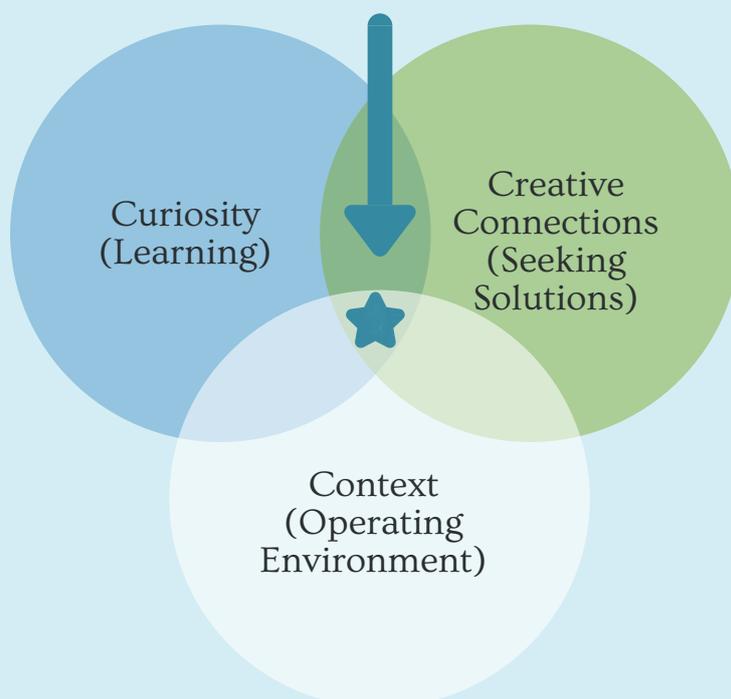
Your Narrative

What's a Narrative?

Understanding your strengths through the lens of the three core Generalist attributes helps discern your unique value proposition that can be distilled into a brief sentence and expanded upon based on examples of previous work experience.



Your unique way of learning and being.



04

Aligning Strengths

Strengths

Complete each using the example as a model.

Example: Strengths and examples that explain your curiosity.

“Quick learner”
“Understand people’s unsaid needs.”
“Organized”

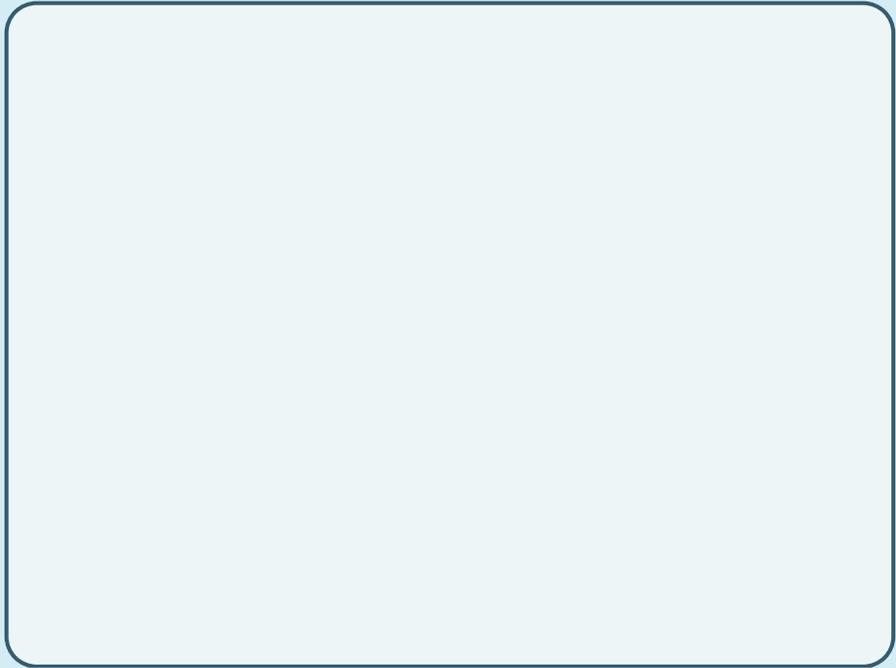
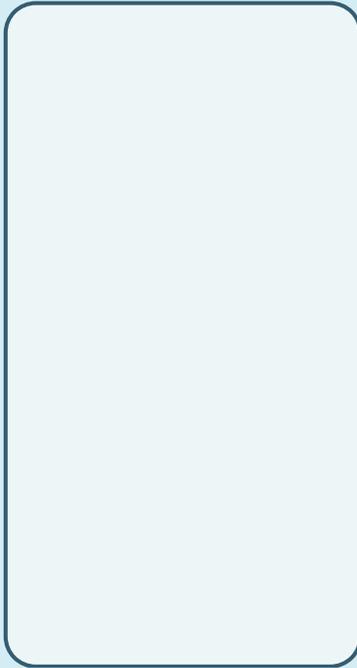
*I have always gotten a sense of people’s essence very quickly, ie their vibe, what they seem to need and where they are unhappy. I know how to help them easily and quickly with a few inviting questions.
I like to learn about what makes someone different. The little things. When I was a barista I always had people’s drink order ready for them before they asked.*

Strengths and examples that explain your curiosity.

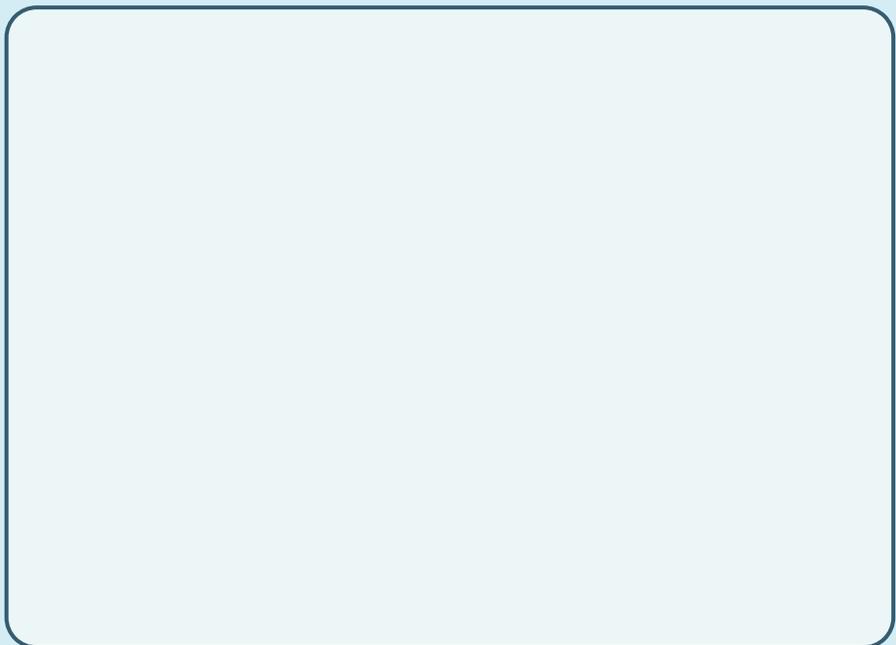
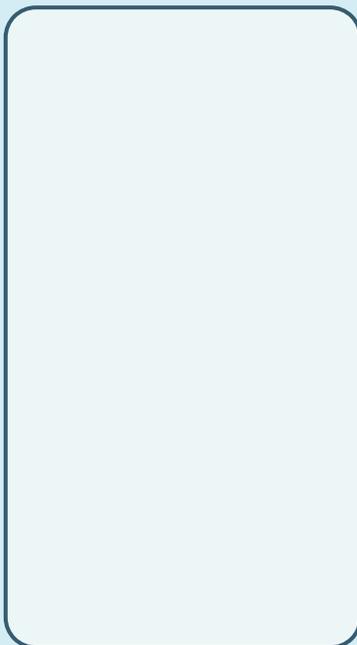
04

Aligning Strengths

Strengths and examples that explain your Creative Connections.



Strengths and examples that explain your best Context.



05

Building a Narrative

Bring, Thrive & Impact

Based on your reflection, what do you Bring and what do you need to Thrive in a role to be your best? How do you define your desired Impact when using your strengths?

What do you Bring?

Where do you Thrive?

Desired Impact (to what end?)

Value Proposition: Solving the What Do You Do Problem

Individualizing and communicating your value as a Generalist can be hard. Instead of trying to say what you "do", use the talents that you "bring" to the opportunity in which you "thrive" explaining the "impact" you deliver. While slightly longer than a single word (or title) answer, this approach is more effective for Generalists because it mirrors problem solving statements. Use the following “MadLibs” exercise to generate draft “I” statements using the work you have done to date.

When you have created a few statements that resonate, use an AI tool to iterate and/or socialize your draft statement with others for further feedback. Once you have a draft that makes sense to you, practice saying it out loud. The goal is that when people ask you "What do you do" you have an easy and automatic answer.

Statement Development

My strengths in _____, _____, and _____ allow me to _____ and _____ resulting in _____.

Team members count on me to _____, _____, and _____, resulting in _____.

I am most successful in an environment where I can _____ and _____ so that I can deliver _____.

I am a _____ who excels at _____ and _____ in organizations seeking to _____.

I am like a _____ that _____ for _____ that _____.

I solve _____, by bringing _____ and _____ resulting in _____.

An environment that allows me to _____ ensures I can _____ for _____ resulting in _____.

Taking Credit

One of the hardest challenges for Generalists is figuring out how to “take credit” when they are not the expert. Refer to the list below for words to use; feel free to add more.

Accelerated	Informed	_____
Addressed	Initiated	_____
Advanced	Instrumental in	_____
Advised	Integrated	_____
Advocated	Introduced	_____
Affected	Involved	_____
Aided	Key participant in	_____
Assisted in/with	Launched	_____
Bolstered	Leveraged	_____
Championed	Lifted	_____
Collaborated on	Managed	_____
Consulted on	Maximized	_____
Contributed to	Moved forward	_____
Coordinated	Navigated	_____
Created	Offered insights for	_____
Dealt with	Optimized	_____
Developed	Orchestrated	_____
Directed	Overcame	_____
Drove	Oversaw	_____
Elevated	Participated in	_____
Enabled	Pioneered	_____
Engaged in	Played a role	_____
Enhanced	Progressed	_____
Established	Propelled	_____
Evolved	Provided input on	_____
Facilitated	Pushed forward	_____
Finalized	Refined	_____
Finessed	Resolved	_____
Forwarded	Shaped	_____
Gave	Spearheaded	_____
Guided	Steered	_____
Handled	Strengthened	
Helped	Supported	
Impacted	Tackled	
Improved	Took part in	
Influenced	Worked on	

06

Environment

Role Priorities

Select a maximum of five key criteria for your next role or organization. Detail any specifics in the notes section.

Criteria

- Mission/Purpose
- Type of Work
- Culture & Values
- Location/Logistics/Remote
- People You Work With
- Size, Stage (ie Start-up, Corporation)
- Work/Life Balance
- Role/Title
- Career Development
- Compensation & Benefits
-
-
-

Top Criteria

-
-
-
-
-

Notes

07

Mature Generalist Development

Listening

Strength

Goal

Curation

Strength

Goal

07

Mature Generalist Development

Decision Making

Strength

Goal

Feedback

Strength

Goal

- **Practice**—In a world full of Specialists, as Generalists, we are not experts in specific areas of information, but instead experts in practice: of learning, trying, revising, improving, and making decisions in ambiguous moments and fast-changing circumstances.
- **Pilot**—In the spirit of learning, we like to test new ideas, innovate improvements, and figure out what works and, importantly, what doesn't.
- **Partnerships**—As Generalists, we need others both as the source of our learning and the evidence of our success. We need the expertise of Specialists from whom to learn, as well as the problems that emerge in between.
- **People, Process, Product**—Generalists frequently become managers because we function “in-between,” seeking information and providing solutions.
- **Power**—Adaptability and variability are a source of power for Generalists. Change is our medium and demands what we do best: use our curiosity and ability to connect the dots. Variability allows us to feed our curiosity and creative connections.

