YOUR PERSONAL BRAND STRATEGY

Please can you complete the form below and bring it with you to the training.

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| **Name:** |
| **Brand Strengths & Weaknesses:** |
| Where are you now? Give 3 words that describe your brand strengths:  What is the main professional development area you’d like to work on during the training? |
| **Objectives:**  These are your professional goals. They should be SMART (specific, measurable, achievable, relevant and time-oriented), for example:   * My objective is to have trusted advisor status with my senior colleagues, so that, in 12 months’ time, I have full responsibility for running my own project. * In 2 years’ time, I’d like to have x position at Rathbones and have a reputation as y. |

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| **Brand Strategy:**  From the top tips below, identify 5 themes that you would like to adopt as your strategic approach to propel you towards your objectives. |
| 1.  2.  3.  4.  5. |
| **Target Audience:**  Which groups of people are going to help you meet your objectives? |
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TOP TIPS FOR TRAINEE INVESTMENT MANAGER SCHEME

This list was put together by the participants of the previous graduate scheme.

**Attitude**

* Be enthusiastic and diligent – you get out what you put in.
* Be confident, but also self-aware.
* Show initiative and offer assistance at all times.
* Be thorough and meticulous.
* Be inquisitive – ask a LOT of questions.
* Be positive.
* Be proactive and engaging.
* Being tardy, unkempt or unorganised can make placement hosts dislike you no matter how brilliant you are in other ways. Get the simple stuff right!

**Relationships**

* Have regular meetings with your placement host, which you arrange right at the start of the rotation. Talk about what you want to get out of each placement, and if you don’t know what you want, ask for suggestions.
* Make good contacts wherever you go – it will serve you well in the end.
* Form a strong network within the graduates so you can help each other out and be a sounding board for each other if you come across a problem in a placement.
* Don’t be afraid to ask the graduates/assistants ahead of you for help or advice – they were recently in your shoes and will be more than happy to help.
* In your first week of each placement, email some key people to arrange a meeting. The sooner the better and so if any work crops up, they will know to ask you.
* Get to know the team, ask them what they find most difficult. Try not to make those mistakes down the line.

**Your Role and Skills**

* Be willing to give everything a go. Don’t get stuck in one aspect of each desk’s work – make sure you try a bit of everything.
* Don’t be rigid in your expectations – the day-to-day of each role is never the same, so be prepared to help out if something new turns up and have the ability to adapt.
* Learn how to use the systems and research tools – a lot of other employees will be less comfortable than you and will think you’re brilliant if you can use them effectively.
* Never underestimate the importance of being a competent Excel user! If you’re not comfortable with it, tackle this nice and early on and it will make the world of difference.
* Be willing to get involved with all aspects of the job, including small administrative tasks – nothing is “beneath you”.
* Write to do lists, as tasks can build up fairly quickly.
* When given a task always ask when they would like it by as this helps with prioritising.
* Ask for feedback, to find out if you are on track and achieving what is expected of you.
* Don’t be afraid to show off your skills. Ask to get involved in particular areas that interest you.
* If you don’t have anything to do, ask for more work – the placement host will be grateful that you are willing to help and impressed that you took initiative and didn’t just sit there idle.
* If you make a mistake, own it and fix it.

**Meetings**

* Attend as many meetings as possible - they are great opportunities to meet with senior management.
* Ask if you can write the minutes for meetings. Firstly, you are helping with note taking, but you are also getting a greater understanding of the business.
* Have confidence to ask questions in meetings – speak up.
* Bring forward ideas for discussion.
* Have debriefs with colleagues post meetings.
* Write notes in meetings – they will be good to refer back to.