

The 24-Month Career Pivot

Turn the experience you already have
into value in your next role.

MY STORY. YOUR WORKING PLAN.

From corporate tax accountant to award-winning Customer Success Executive. A practical guide to finding your transferable edge, earning trust, and proving your impact.

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01 / THE STORY

You are bringing more than you think.

My path from corporate tax to Customer Success

When I tell people I went from a corporate tax accountant to an award-winning Customer Success Executive in under two years, I usually get the same reaction: "Really? How did that happen?"

There was no perfect roadmap or overnight transformation. But the transition was intentional. I leaned into what I already knew, committed to learning what I did not, and made one promise to myself:

THE PROMISE

Be the person the customer sees first, remembers most, and trusts completely.

For more than a decade, I worked in tax departments, managing complexity, competing deadlines, and conversations with Tax Directors, VPs of Tax, and CFOs. When I joined Thomson Reuters in Customer Success, that experience came with me. I understood the pressure, the need for accuracy, and the frustrations of the people I would now serve.

The new role still required a new mindset. I listened more than I talked. I asked whether the customer actually won. I took responsibility for helping move problems toward resolution and learned to anticipate them earlier.

In 2023, I received Rookie of the Year and Circle of Excellence awards. In 2024, I received the Customer Success Executive of the Year award. The recognition mattered. The trust behind it mattered more.

The following roadmap is a proposed plan for you, built from those lessons. It is not a month-by-month record of my transition or a promise that every pivot takes two years.

02 / THE APPROACH

Three habits that travel across roles.

Your customer may be a buyer, colleague, patient, student, or internal team.

1. Understand the world you are entering.

Domain fluency starts with curiosity. Learn how people work, what creates pressure, and what a good outcome means to them. Your previous role may already give you insight that a newcomer would need years to develop.

ASK

"What keeps you up at night?" is one opening. Make it specific: "Where does this process break down?" or "What needs to be true for this to be a successful quarter?"

2. Measure the outcome, not just the activity.

A meeting held, a ticket closed, or a project delivered is useful evidence of effort. It does not tell you whether someone is better off. Ask what changed: less rework, faster decisions, a smoother handoff, or more confidence in the result.

3. Own the follow-through.

When something goes wrong, help make the problem visible. Clarify who owns the next step and when an update is due. You do not need to perform every fix yourself. You do need to avoid letting the problem disappear between teams.

FOR CUSTOMERS AND TEAM LEADERS

Look for a partner who understands your work, connects activity to results, and stays engaged through resolution. Use the same standard to assess your own team.

03 / YOUR PROPOSED ROADMAP

Give the next 24 months a direction.

Start at the phase that matches your situation. Adjust the pace as you learn.

MONTHS 1-3 / Find your edge

Choose a target role. List the problems you already know how to solve. Talk with people doing the work.

Leave with: a one-page role hypothesis and three examples of transferable value.

MONTHS 4-6 / Close the right gaps

Identify the skills that matter for that role. Practice through a real project, assignment, or supervised opportunity.

Leave with: one piece of work and specific feedback on what to improve.

MONTHS 7-12 / Earn trust through delivery

Apply your skills in the new role or in a bridge assignment. Listen, agree on success, and follow through consistently.

Leave with: a documented outcome and a repeatable way of delivering it.

MONTHS 13-18 / Become more proactive

Notice recurring friction. Raise risks early, test an improvement, and learn from the people affected.

Leave with: an example of anticipating a problem or improving a process.

MONTHS 19-24 / Make the value visible

Summarize your strongest results. Seek candid feedback. Use the evidence to pursue the right next responsibility.

Leave with: an updated career story and a clear next move.

AT EVERY QUARTER

What did I learn? What improved for someone else? What evidence supports that?
What should I change next?

04 / WORKSHEET

Name your transferable edge.

Complete this before you decide that changing roles means starting over.

The role or type of work I want to move toward:

Three problems I already know how to solve:

Think about complexity, deadlines, communication, tools, or relationships.

Who benefits from that experience, and why?

One example that proves it:

Describe the situation, what you did, and the result. Use numbers when you have them.

One gap I need to close, and how I will practice:

BUILD YOUR POSITIONING STATEMENT

"I bring [experience] to [new role], so I can help [people] achieve [outcome]. I am developing [skill] through [specific practice]."

05 / WORKSHEET

Listen until success is specific.

Use this in a customer conversation, project kickoff, or meeting with a future teammate.

Ask: Where is the work getting stuck? What have you already tried? What would a useful improvement look like? Who else needs to be involved?

The person or team I am serving, and their priority:

The problem in their words:

What a win would look like:

Agree on the starting point, desired result, and timeframe where possible.

The next action, owner, and update date:

How we will know whether the change helped:

CHECK YOUR UNDERSTANDING

"Here is what I heard. Your priority is _____. A good result would be _____. Our next step is _____. What have I missed?"

06 / WORKSHEET

Move from reacting to anticipating.

Trust grows when you notice friction before it becomes a bigger problem.

Choose one recurring issue within your reach. Learn why it happens, then agree on a small improvement with the people affected. Start with something you can observe and test.

The recurring problem or risk:

The earliest sign that it is developing:

Who needs to know, and what do they need to decide?

The small change I will test, its owner, and the test date:

What happened, and what will I change next?

MAKE OWNERSHIP VISIBLE

Raise the concern early. Explain the effect. Offer a next step. Agree on who will act and when you will check back.

07 / QUARTERLY REVIEW

Build evidence, then choose your next move.

Repeat this page every three months. Keep your completed copies.

This quarter / dates:

My strongest example of value delivered:

What was the problem, what did I do, and what changed?

Evidence and feedback that support the result:

Record a metric, work sample, or specific feedback. Respect confidentiality.

Where I still need help or practice:

My next priority, owner, and deadline:

Decide based on what you learned.

- Continue: The work fits, results are improving, and feedback supports the direction.
- Adjust: The direction still fits, but the skill gap, opportunity, or approach needs to change.
- Reconsider: The daily work or tradeoffs do not match what you want. Revise the target before investing more time.

08 / START HERE

Your next 30 days.

You do not need to solve your entire career this month. Create useful evidence.

WEEK 1 / Put the target into words

Complete the transferable-edge worksheet. Pick one role or kind of work to explore, and one gap to investigate.

WEEK 2 / Test your assumptions

Have two conversations with people doing that work. Ask what success looks like, what is difficult, and which skills matter most.

WEEK 3 / Practice on something real

Choose one small project you are authorized to do. Define a useful result, involve the right people, and request feedback.

WEEK 4 / Review and commit

Record what you learned. Decide whether to continue or adjust. Set a specific priority for the next 90 days.

The action I will take in the next seven days:

The person I will learn from, and when I will reach out:

USING THE WORKSHEETS

Type into the shaded boxes in a PDF viewer that supports forms, or print and write by hand. Save a separate copy for each review. Keep entries concise; use a separate note for longer examples.

09 / YOUR MOVE

Action items for every career stage.

Use the stage that fits your situation. These habits are useful at any age.

Early in your career: build the foundation.

- Learn how people actually operate. Understand their work, pressures, and definition of a win. Learn the whole process, not just your task.
- Ask better questions. Ask where the work gets difficult, then listen more than you talk. Confirm what you heard.
- Earn a reputation for follow-through. Keep your promises, communicate early, and become someone people can count on.

Mid-career: name and use your edge.

- Make your experience transferable. Write down what you understand that a newcomer would have to learn. Connect it to a need in the next role.
- Reframe your scoreboard. Deadlines and budgets matter. Also ask: did the person or team I served actually benefit?
- Own the outcome. Help move problems toward resolution. Coordinate the handoffs and make the next step clear.

Later in your career: reposition deliberately.

- Bring your solved problems into a new room. Explain how your judgment and experience can help there. Learn what is different.
- Build value through anticipation. Notice risks, raise them early, and help others act while there is still time.
- Stay curious and present. Learn the relevant tools. Make time for meaningful conversations. Become a trusted partner in the work.

10 / THE REMINDER

Trust first. Recognition second.



2024 Customer Success Executive of the Year

The award is part of my story. Your measure of progress will be the problems you can solve, the people you can help, and the trust you earn.

Ryan Stemen

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For more practical lessons on leadership, ownership, and building a career with intention, visit my website and find the newsletter.