



IDENTIFYING THE NEEDS AND OPPORTUNITIES OF YOUR PROTÉGÉ

Advocate Tool Kit #2



Building the relationship

Advocate and Protégé relationships work when both people develop a trusted relationship that allows each to share honestly. As you initiate your relationship with your Protégé, here are recommendations to prepare yourself and your mindset for a successful relationship.

- Be open to commonalities and differences.
- Openly acknowledge what may be different.
- Be open; don't be defensive.
- Listen deeply and seek to understand.
- Don't be afraid to share weaknesses, fears, and concerns.
- Ensure your Protégé feels comfortable sharing the fullest picture of your career to date and aspirations.

Phases of the Sponsorship Relationship



- Initiation: Relationship building; focus on creating trust and rapport.
- **Cultivation: Identify needs and opportunities; provide feedback; share insights**
- Active Partnership: Advocate; expose; provide air cover; networking
- Evolve & Advance: Wrap up; evaluate results; pay it forward

Relationship Check-In

As a reminder, before becoming an Active Partner (Phase Three) for your Protégé, **trust, rapport, and connection must be established.** Initial feedback from some of our Protégés is that some advocates have immediately gone into "how can I help you" mode instead of "how can I get to know you" mode. The risk here is that sponsorship eventually calls for active advocacy and you potentially providing air cover for your Protégé--and you might not be ready for these actions. Similar to the foundation of a house, without a foundation of trust and rapport between you and your Protégé, it will be difficult for the relationship to transition into sponsorship and for both of you to feel fulfilled in the relationship.

Please review the following questions and think honestly about your answers. If you determine that more work is needed to build a trusted relationship with your protégé, please spend some dedicated time deepening the relationship before you move into collaborating on their career strategy.

- Is developing a relationship with your protégé a high priority for you? Do your actions match your words?
- How do you feel the relationship is progressing? What does your protégé say to you about how the relationship is going?
- Have you discussed common interests outside of work with your protégé? Do you know their commitments outside of work?
- Have you shared your personal career journey with your protégé, including challenges, defining moments, personal successes, and areas that are still challenging for you?
- Could you easily articulate your protégé's role at Wintrust, including key projects and initiatives that are their proudest accomplishments?
- Have you discussed real or perceived career bumps or roadblocks that your protégé has experienced at Wintrust?
- Do you know your protégé's values and what is important to them as their career advances?
- Have you discussed and expressed curiosity about your protégé's experience at Wintrust, including how it may be different from yours? For example, if your protégé is of a different gender or ethnicity, have you taken time to understand how their background has shaped who they are personally and professionally?
- Do you feel trust and rapport have been established with your protégé? Do you think your protégé feels 'safe' to share their career aspirations, gaps, challenges, etc., with you?

If you need any support navigating your relationship with your protégé, please reach out to us.

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Work With Your Protégé to Define Their Value Proposition

After spending time building a relationship and creating trust with your protégé, the next goal is for you to be comfortable speaking about who your protégé is, what their career goals are, and be able to highlight key projects and initiatives that are their proudest accomplishments. You should also know what the protégé is not interested in pursuing and why.

During the Cultivation phase, you should strategize with your protégé to establish their unique value proposition within Wintrust, helping them to gain clarity on their leadership brand, and how they can add more value to Wintrust.

- What's their vision or aspiration for their professional self?
- What attributes/characteristics do they want to be known for?
- What outcome would be the most tangible expression of their professional purpose?
- What contributions would they find most meaningful (least meaningful)?

Help Your Protége Map Their Career Journey

Over the next 60 days, you should focus on collaborating with your protégé to identify future career opportunities and barriers and begin identifying how you may support your protégé to overcome the barriers or leapfrog forward.

The aim will be to strategize on key milestones identified when further support could be asked for and or offered.

Ask your protégé to identify the role they ideally would like to be doing in five years. While there is a need to be realistic, they should be selecting an aspirational role. Ask your protégé to analyze their current role and aspirational role. Provide feedback and ask questions to lead both of you to identify crucial stepping stones toward the next role. Additionally, you and your protégé should be discussing the following:

- What accomplishments would they find deeply satisfying?
- Who do they need to know?
- Are there projects that would give them more visibility and experience?

Strategizing With Your Protégé

Identifying Sponsorship Activities

The goals of these sessions during the Cultivation phase are to help your protégé identify the following:

- the risks they may need to take
- the opportunities they need to seize
- the connections they need to make
- the battles worth fighting and those that can be ignored
- the image they need to promote

As you and your protégé get greater clarity on their career direction, think about the following four tactics as you prepare for active sponsorship.

SPONSORSHIP TACTIC	EXAMPLE BEHAVIOR(S)	INTENDED GOAL
Amplify	Being aware of and talking up a protégé's accomplishments	Create or increase perceivers' positive impressions of the protégé.
Boost	Formally nominating a protégé for specific opportunities; writing letters of recommendation, attesting to the protégé's future potential	Increase others' expectations of the protégé's potential and readiness for advancement
Connect	Introducing a protégé to high-status individuals; inviting a protégé to exclusive events or meetings	Create or enhance perceivers' positive impressions of the protégé; increase the protégé's visibility
Defend	Challenging others' negative perceptions of a protégé; providing an alternative explanation for poor performance; protecting a protégé from harmful exposure	Reverse or neutralize others' uncertainty or negative perceptions of the protégé

Source: Adapted from Don't Just Mentor Women & POC, Sponsor Them, Harvard Business Review, June 2021