



ADVOCATE TRAINING SESSION #2

# ADVOCACY IN ACTION: STRATEGIES FOR ACTIVE ADVOCACY

March 11th, 2026

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# TODAY'S FOCUS

Ensuring your protégé is actively engaging with you and getting what they need. We have 75 days left to make this partnership deliver results.



01

What active advocacy actually looks like in practice.

02

How to navigate common challenges you might be facing.

03

How to maximize the next 75 days so your protégé gets real, measurable results.

“  
MENTORS GIVE  
PERSPECTIVE  
ADVOCATES GIVE  
OPPORTUNITIES.  
”



# LET'S DISCUSS



What type of advocacy have you provided for your protégé so far?

- A. Made strategic introductions
- B. Created visibility opportunities (meetings, projects, presentations)
- C. Advocated for them in talent/succession conversations
- D. Provided direct feedback and coaching
- E. Given them stretch assignments or exposure
- F. Honestly, I haven't done much yet



# LET'S DISCUSS



What's the biggest challenge you're facing as an advocate right now?

- A. I don't have enough time to dedicate to this
- B. My protégé isn't being proactive or clear about what they need
- C. I'm not sure what opportunities are available or appropriate
- D. I don't know how to advocate without overstepping
- E. My protégé isn't following through on opportunities I create

# WHERE WE ARE IN THE PROGRAM



## INITIATION

- Build **TRUST** & support
- Relationship building
- Information exchange - assessments and aspirations
- Establish relationship guidelines & expectations

## CULTIVATION

- **INVEST** in the partnership
- Identify needs and opportunities
- Provide feedback
- Share insights
- Goal setting
- Strategic planning

## ACTIVE PARTNERSHIP

- **DELIVER** on the strategy
- Advocate
- Expose
- Air cover
- Networking
- Evaluate progress & adjust as needed
- Projects

## EVOLVE & ADVANCE

- **AMPLIFY** your message
- Wrapping up
- Results

SEPT - OCT

NOV - DEC

JAN - APRIL

MAY



# UNDERSTANDING THE ACTIVE PARTNERSHIP PHASE



# CONCRETE WAYS TO ADVOCATE FOR YOUR PROTÉGÉ

## Exposure & Visibility:

- Bring them to meetings where they can shadow and learn
- Provide exposure to senior leadership
- Mention their name in conversations where opportunities arise
- Invite them to events or forums they wouldn't normally attend

## Opportunities & Development:

- Give them stretch assignments on your team
- Reconfigure work to develop specific skills they need
- Tell them about opportunities across Wintrust they wouldn't know about
- Share external connections, learning resources, or industry contacts

## Networking & Connections:

- Make strategic introductions to key contacts
- Help them understand how their work connects to other parts of Wintrust
- Expand their network beyond their current department
- Facilitate connections with decision-makers

## Strategic Support:

- Provide insight into organizational priorities and challenges
- Advocate for them in talent reviews and succession planning
- Provide air cover when they take calculated risks
- Meet with them in person at strategic moments
- Speak up for them when opportunities arise in meetings

# REAL EXAMPLES OF ADVOCACY IN ACTION

- "My advocate connected me with department leaders to discuss my career future"
- "My advocate brought me into collaborations with people I haven't worked with before"
- "My advocate put my name out there with senior leadership, and I got noticed"
- "My advocate motivated me to pursue an interim manager role"
- "I've come out of my comfort zone and collaborated with different team members"





# OVERCOMING CHALLENGES IN ACTIVE PARTNERSHIP





# CHALLENGE #1 - TIME CONSTRAINTS



## High-Impact, Low-Time Advocacy:

### 5-Minute Actions:

- Send one email introduction
- Forward one opportunity
- Mention their name in a meeting

### Leverage Existing Activities:

- Bring them to a meeting you're already attending
- CC them on relevant email threads

### Batch Your Advocacy:

- 15 minutes weekly: "What's one thing I can do for my protégé this week?"



## **Have a Direct Conversation:**

- "I want to help you, but I need you to be specific about what you need."
- "I created this opportunity—what happened? I haven't heard anything."

## **Give Them Structure:**

- Ask them to come with 3 specific requests
- Set clear expectations about follow-through

## **Model Proactivity:**

- Don't wait for them to ask—bring opportunities to them
- Show them what's possible



# CHALLENGE #3 - NOT SURE WHAT OPPORTUNITIES ARE AVAILABLE



## **Start With Your Sphere of Influence:**

- Who do you know that they should know?
- What meetings could they shadow?
- What projects could they contribute to?

## **Ask Your Protégé:**

- "What departments interest you?"
- "Who do you want to meet?"
- "What skills are you developing?"

## **Create Opportunities:**

- Bring them to a meeting
- Make an introduction
- Invite them to contribute to your work



# CHALLENGE #4 - DON'T WANT TO OVERSTEP OR ADVOCATE TOO HARD



## **Calibrate Your Advocacy:**

- Start small: introductions, visibility, context
- Build up: advocate more strongly as they prove themselves

## **Be Honest About Readiness:**

- "They're not ready for X yet, but they're working on it."
- "They're ready for a stretch—they'll learn fast."

## **Set Them Up for Success:**

- Prepare them before you advocate
- Follow up after to ensure they act

**Remember: Most advocates err on doing TOO LITTLE, not too much**



# YOUR ADVOCACY ACTION PLAN

## Individual Reflection (5 minutes)

### Answer these 3 questions:

1. What's ONE specific opportunity I can create for my protégé in the next 30 days?
2. What's ONE conversation I need to have with my protégé to get clarity on what they need?
3. What's ONE high-impact, low-time advocacy action I can take THIS WEEK?

**Write down your answers.**

**Let's hear from a few of you:**

**What's ONE advocacy action you're committing to in the next 30 days?**



# DEFINING SUCCESS IN MY ADVOCACY JOURNEY



## SUCCESS FOR YOUR PROTÉGÉ

- Visibility with senior leadership
- New skills or stretch assignments
- Expanded network
- Career clarity and confidence



## SUCCESS FOR YOU

- Created 2-3 tangible opportunities
- Had honest development conversations
- Saw them grow and take on challenges
- Feel proud of your impact



## SUCCESS FOR THE RELATIONSHIP

- Open communication
- Mutual accountability
- Proactive engagement from both sides
- Measurable progress

# REMINDERS

- Your protégé is counting on you to use your influence
- Advocacy is action, not advice
- High-impact advocacy can take just 5 minutes
- Be direct about what you need from your protégé
- If they're not proactive, have the conversation
- Use the influence you already have
- Err on the side of creating opportunities
- Success = tangible opportunities created

**We have 75 days left. Make them count.**



# YOUR COMMITMENT

I will \_\_\_\_\_ for my protégé by  
\_\_\_\_\_ (date).

## Examples:

- Introduce my protégé to [name] by March 20th
- Invite my protégé to shadow me in [meeting] on March 15th
- Advocate for my protégé in talent review next Tuesday
- Have a direct conversation about needs by end of week

**Put a reminder in your calendar RIGHT NOW.**





# THANK YOU FOR YOUR TIME



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