

Protégé Career Strategy Session Wintrust Sponsorship Program

Your Role: This session is about discovering your protégé's career vision and starting to identify specific ways you can help them achieve it.

Session Flow

1. Discovery (20 mins)

- Have them walk you through their completed template
- Listen for themes and opportunities
- Note areas where they show energy/hesitation
- Ask clarifying questions (suggested questions are attached)

2. Exploration (30-40 mins)

- Dig deeper into 2-3 areas that emerge as priorities
- Share relevant experiences from your journey
- Test assumptions together
- Look for places where your experience/network can help

3. Action Planning (20 mins)

Together complete the brainstorming template covering:

- Network Connections needed
- Visibility & Exposure opportunities
- Skill Development areas
- Career Navigation support

4. Wrap-up (10 mins)

- Capture key insights
- Agree on immediate next steps
- Plan next connection

Key Reminders:

- Listen more than talk
- Focus on understanding before advising
- Be specific about how you can help
- This is the start of an ongoing journey

Success looks like:

- Clear understanding of their aspirations
- Specific actions identified
- Protégé feels heard and supported
- Foundation set for ongoing relationship



Suggested Clarifying Questions for Career Progression Template

Background & Experience:

- What aspects of your background have most shaped your career choices?
- Which experiences have been most influential in developing your current skillset?

Values & Preferences:

- How do your stated values show up in your day-to-day work?
- What types of work environments help you thrive?
- Which projects have felt most aligned with your values?

Strengths & Growth:

- Can you share specific examples where you've demonstrated these strengths?
- How do you want to leverage your strengths differently in your next role?
- What makes these particular areas growth opportunities for you?

Goals Discussion:

- What sparked your interest in these particular goals?
- How do these goals build on each other across the timeframes?
- What would success look like for each goal?
- How do your personal goals complement or challenge your work goals?

Development Needs:

- Which skills or experiences would make the biggest impact on reaching your goals?
- What types of network connections would be most valuable?
- How can I best support you in addressing these development areas?

For Deeper Exploration:

- What assumptions are you making about your career path?
- Which parts of this plan energize you most?
- What concerns or uncertainties do you have?
- How flexible are you about adjusting these goals as opportunities arise?

Questions to help a stuck Protégé explore and clarify their goals:

Career Direction Questions:

- What energized you most in your past roles?
- If success was guaranteed, what would you pursue?
- What do you want to be known for professionally?
- Which parts of your current role would you like to do more/less of?

Vision & Values Questions:

- What does meaningful work look like to you?
- Who do you admire professionally and why?
- What impact do you want to have?

Barrier Exploration:

- What's holding you back from setting specific goals?
- What uncertainties are you wrestling with?
- What additional information would help you decide?

Alternative Approaches:

- Instead of defining exact goals, what general direction interests you?
- What small experiments could you try?
- What skills would you like to develop, regardless of role?
- Who could you shadow or interview to learn about different paths?



Brainstorming Together

Network Connections

Specific introductions needed
Types of relationships to build

Visibility & Exposure

Projects/presentations to showcase skills
Cross-functional opportunities
Committee/leadership roles

Skill Development

Training/courses to pursue
Stretch opportunities
Hands-on experiences needed

Career Navigation

Timing considerations
Key decision points ahead
Strategic positioning opportunities

Key Insights: [Top 2-3 realizations/clarifications from discussion]

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