

# **WORKING WITH YOUR ADVOCATE TO IDENTIFY YOUR NEEDS AND OPPORTUNITIES**

**Protégé 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, **trust, rapport, and connection must be established before your advocate can become an Active Partner** (Phase Three) for you. Initial feedback from some of the protégé is that some pairings have fast-tracked to the "how can I help you" mode" instead of spending focused time in the "how can I get to know you" mode.

The risk here is that sponsorship eventually calls for active advocacy and potentially air cover from your advocate. Similar to the foundation of a house, without a foundation of trust, rapport and connection between you and your advocate, it will be difficult for the relationship to transition into advocacy 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 advocate, please spend some dedicated time deepening the relationship before you move into collaborating on your career strategy.

- Does it feel like developing a relationship with you is a high priority for your advocate? Have you been investing in this relationship?
- How do you feel the relationship is progressing? What does your advocate say to you about how the relationship is going?
- Have you discussed common interests outside of work with your advocate? Have you talked about your commitments outside of work?
- Have you shared your personal career journey with your advocate, including challenges, defining moments, personal successes, and areas that are challenging for you? Has your advocate shared this?
- Can your advocate easily articulate your role at Wintrust, including key projects and initiatives that are your proudest accomplishments?
- Have you shared any career bumps or roadblocks that you have experienced at Wintrust?
- Have you shared your values and what is important to you as you advance in your career?
- Has your advocate expressed curiosity about your personal experiences at Wintrust? Have you shared with your advocate how your background has shaped who you are personally and professionally?



## Relationship Check-In

- Do you feel as though trust and rapport have been established with your advocate? Do you feel safe sharing your career aspirations, gaps, challenges, etc. with your advocate?

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

## Work With Your Advocate To Define Your Unique Value Proposition

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

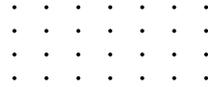
During the Cultivation phase, you should also strategize with your advocate to establish your unique value proposition (UVP) within Wintrust to clarify your leadership brand and how you can add more value to Wintrust.

**Think about your career as if it were a business.** Your UVP sums up the unique way that you approach your roles and responsibilities at Wintrust. As you work with your advocate to gain clarity on your UVP, remember it is not your resume or past experiences--it should be future-focused and include your deliverables and results that distinguish you from your colleagues and teammates.

Defining your UVP is also a prerequisite to enlisting the active partnership of your advocate. If they don't know what you stand for, are known for, and can solve for, they have no way of helping you.

To hone in on your UVP, review and discuss these questions with your advocate.

- What do I do exceptionally well?
- What have I been told is unique about how I approach my work?
- How am I innately different from my peers?
- What about my background, education, or experience makes me unique?
- What accomplishments have given me joy and won me accolades?



## Work With Your Advocate To Define Your Unique Value Proposition

- What gives me satisfaction, and I want to do more of it?
- How does the mission of Wintrust overlap with my own values and goals?
- What are the three values that are most important to me as a leader and a colleague—that is, the consistent behaviors that everyone can rely on from me?
- What approach do I bring to solving problems at Wintrust? How does this distinguish me from my peers?

### Additional Resources

- [Define Your Personal Leadership Brand in Five Steps](#)
- [What is your personal leadership brand?](#)

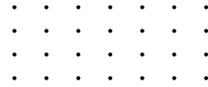
## Mapping Your Career Progression

On the last page of this toolkit, you will find a [Career Progression template](#). Before you have a strategy session with your advocate, fill out this template to help guide the discussion. Here are some things to keep in mind.

Be specific about your values, preferences, strengths, and growth opportunities. The more you outline here, the more your advocate can help you figure out goals (personal and professional) that align with what you want.

Have more than one option for Short Term, Mid-Term, and Long-Term goals. It's okay to explore a few possible next steps you are interested in and get feedback from your advocate on the feasibility of them and how they might position you to achieve your long-term goals.

If possible, identify the development needs/experiences required/network items that can catapult you forward and those that are incremental steps. We know that most development plans typically include training programs, observing, and on-the-job activities, in that order. However, people usually learn the most through on-the-job activities, observing, and then classes, in that order! Focus on on-the-job activities to learn the most quickly. Don't overlook building your network.



## Engaging Your Advocate On Your Plan

Engage in a discussion with your advocate to finalize your plan together. Consider asking these questions:

- **Getting Feedback on the Plan**
  - Given my long-term goals, what do you think my short-term and mid-term goals should be? Is this plan too conservative or too aggressive? What are ways I could catapult myself forward or make an incremental step?
  - What experiences/skills/network do you think I need to achieve this plan?
  - Who do I need to know that could help me reach my goals?
  - What am I missing that would help me achieve these goals?
  - From my perspective, \_\_\_ seems the hardest to achieve. What are your ideas for me to tackle this?
- **Widening Your Perspective**
  - How can I widen the perspective I have? What should I be paying attention to in others areas of Wintrust, or even outside of Wintrust?
  - Who else should I be talking to help me develop this plan?
- **Executing the Plan**
  - What strengths should I lean into when executing this plan?
  - I'm worried about \_\_\_. What ideas do you have to help me with this?
  - Are you seeing places where you can help me? What would you need to feel comfortable helping me with this?
  - Here's where I think you could help me. What do you think about this?
  - How should we sequence these activities?