

Phase 1: Initiation

BUILDING A SUCCESSFUL & VALUABLE PARTNERSHIP

ADVOCATE
TOOLKIT #1



BUILDING THE RELATIONSHIP

As the advocate, you can set the tone of the relationship between you and your protégé. If you are open about the topics you are willing to discuss, the ways in which you can help, and what you want to know about your protégé, you can help him or her to better understand the ground rules and be less nervous about developing a trusted relationship.

In order for the relationship to be successful, you should focus on developing a relationship by viewing it through the lens of four distinct phases.

- **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
- **Separation:** Wrap up; evaluate results

PHASES OF THE ADVOCACY RELATIONSHIP



WHAT ARE MY KEY RESPONSIBILITIES AS AN ADVOCATE?

- Developing a trusting relationship with your protégé.
- Learning about your protégé's long- and short-term goals and taking an active role in helping them to reach them.
- Learning about your protégé's other commitments and obligations outside of work (parent, caregiver, etc.).
- Assess your protégé's potential, not just qualifications.
- Working to ensure they have access to training or other organization or external programs that can enhance their abilities.
- Identifying assignments, promotions, or other opportunities that can help them reach their goals.
- Regularly discuss their abilities and potential with other leaders to raise their visibility and recommend them for opportunities or promotions.
- Actively advocating on your protégé's behalf during internal meetings when career decisions are being made.
- Introduce your protégé to key players in your professional networks to open up even more opportunities for them.

HOW DO I PREPARE MYSELF TO INITIATE THE ADVOCACY RELATIONSHIP?

As you initiate the relationship with your protégé, it's important to consider how to build lines of communication and trust when there are inherent differences between you and your protégé. Here are some recommendations for adopting the mindset of an effective and inclusive advocate.

- **Cultivate your curiosity.** Be open to receiving, without judgment, another's thoughts, feelings, beliefs, and behaviors.
- **Practice "perspective taking"** by seeking to understand the values and emotions of others and how they relate to their actions and behaviors.
- **Suspend** your right to be offended during conversations to promote candor.
- **Recognize** that members of an underrepresented group will not all have the same experiences, and their experiences may be very different from yours.

ENGAGING YOUR PROTÉGÉ'S MANAGER

When should I first contact my protégé's manager?

Reach out within the first two weeks of being paired with your protégé. This early contact sets a collaborative tone from the start and demonstrates your commitment to the advocacy program.

What should I discuss in our first interaction?

- Express your commitment to supporting both the protégé and the team's goals.
- Discuss how you envision working together to support the protégé's development.
- Ask about the manager's expectations and any concerns they might have.

How can I ensure I'm not overstepping boundaries?

- Be clear about your intentions and the scope of your advocate role.
- Establish open lines of communication to address any concerns promptly.
- Regularly check in to ensure your actions align with the manager's expectations.

What if there's a conflict between my advocacy activities and the manager's plans?

- Address conflicts openly and promptly.
- Focus on finding solutions that benefit the protégé the team, and the organization.
- Be willing to adjust your approach if necessary.
- Involve the protégé in discussions when appropriate.
- If needed, consult with Mosaic Worx team for guidance.

ENGAGING YOUR PROTÉGÉ'S MANAGER

What kind of information should I share with the manager about our advocacy activities?

- General themes of your discussions (while maintaining confidentiality on personal matters)
- Skills or areas the protégé is working to develop
- Potential opportunities you're considering for the protégé
- Any concerns you have about the protégé's progress or challenges they're facing
- Positive feedback and accomplishments you've observed

How can I leverage the manager's insights to be a more effective advocate?

- Ask about the protégé's strengths and areas for improvement
- Seek the manager's perspective on the protégé's potential career paths within the organization
- Discuss how your advocacy can complement the manager's development efforts
- Request feedback on your advocacy approach and its impact on the protégé and the team

What should I do if the manager seems resistant to the advocacy program?

- Listen to their concerns and try to understand their perspective
- Explain the benefits of the program for the protégé, the team, and the organization
- Offer to involve them more closely in setting development goals for the protégé
- If resistance persists, consult with the Mosaic Worx team for advice

INITIATION PHASE

HOW TO GET TO KNOW EACH OTHER

① Share personal backgrounds and information

- Share information about yourself--where you grew up, went to school, some unique experiences, how you ended up at Wintrust, your career evolution, your mistakes, challenges, and successes.
- Learn about your protégé – their work experience, achievements, and experiences within the organization.
- Don't forget to share and ask your protégé about non-resume information. What are they passionate about? What do they like to do in their spare time? What makes them happy?
- This information is extremely valuable and can help you better understand them and their motivations. They'll also notice that you care about them as a person, not just as a professional, and this can go a long way in strengthening the advocacy-protégé see relationship.

② Set expectations for the relationship

- Share your commitment to the relationship and ensure you know what your protégé expects of you.
- Discuss frequency, the preferred method of communication, and the preferred venue or location for meeting.
- Make sure to be accessible and follow through consistently on your commitments with your protégé.
- Talk about how you will hold each other accountable to the commitments that you make.
- Discuss how you both will assess how the relationship is going.

③ Ask your protégé for information that will help you direct your efforts on your protégé behalf.

- For example, what are your protégé's goals and aspirations?
- Needs? Challenges? Opportunities? Concerns?

SESSION AGENDAS

As part of the Initiation phase, **over the next 60 days, we recommend that you have at least three meetings** with your protégé focused on getting to know them better--and building a trusted relationship.

On the next few pages, you will find three agenda templates to use as a launching point to have insightful and revealing conversations that are productive and beneficial.



YOUR FIRST MEETING WITH YOUR PROTÉGÉ

THE FIRST GOAL IS TO BUILD THE RELATIONSHIP, GET TO KNOW EACH OTHER, BUILD TRUST, AND ESTABLISH BOUNDARIES.

- Tell me a little more about yourself--personally and professionally.
- What would you like to know about me?
- What information is to be kept confidential and what information can be shared?
- What would you say is your key priority or goal?
- What do you like best about your work?
- What are your interests in terms of your next role?
- How will we best work together?
- Let's clarify objectives and expectations.
- Let me talk about how I see my role as an advocate.
- Resume walk--ask about their strengths they leveraged in each role, what attracted them to the next role, what they learned from each experience. Go beyond the list of duties and achievements to understand how these experiences shaped who they are.

PROPOSED AGENDA FOR MEETING #2

START TO IDENTIFY AREAS YOU CAN PROVIDE ADVOCACY, OPPORTUNITIES FOR GROWTH

- What have been your biggest successes at Wintrust?
- Have you had any defining moments that you'd say have shaped your career path?
- Tell me about a failure and what you learned from it.
- What are your strengths in your current role? How would you like to use them in the future?
- What gaps do you see in your current skills that may be holding you back from advancing at Wintrust, or getting other career opportunities?
- What are your career goals — both short-term and long-term?
- What would others say about the impact you have had? Is that the impact you wanted to have?
- Are you taking on enough challenges?
- What would you set your sights on professionally if you knew you couldn't fail?

PROPOSED AGENDA FOR MEETING #3

START TO DISCUSS THEIR CHALLENGES AND HELP THEM DEEPEN THEIR THINKING ABOUT THEIR STRENGTHS

- What's a challenge you're currently facing in your career?
- What ideas have you developed to help you overcome challenges and meet your goals?
- What obstacles have you faced?
- In what areas do you think you need to improve?
- Does your current role help you leverage your strengths?
- What parts of your job are more difficult because of your weaknesses?
- How do you mitigate your weaknesses?
- Have you ever thought about taking on the role of X?
- What type of feedback have you received from your manager or others?
- Has anything held you back from reaching your goals?
- What are you currently doing or not doing that is getting in the way?
- What are alternatives you might imagine?
- With whom do you need to network to solve this?

POTENTIAL CHALLENGES DURING INITIATION PHASE

As you develop and build a relationship with your protégé, you may encounter mindset blocks. Here are a few challenges which you may come across - and recommendations on how to handle

1. Imposter Syndrome

Challenge: Your protégé may doubt their accomplishments and feel they don't deserve their position or the advocacy opportunity.

Strategies:

- Validate their achievements with specific examples
- Share your own experiences with self-doubt
- Encourage them to keep a "success journal" to document their accomplishments
- Help them understand that imposter syndrome is common, even among high achievers

2. Limiting Beliefs

Challenge: Your protégé may hold beliefs that limit their potential or ambitions.

Strategies:

- Help identify these beliefs by listening for phrases like "I can't..." or "I'm not good enough to..."
- Challenge these beliefs gently with evidence of their capabilities
- Encourage them to reframe limiting beliefs into growth-oriented statements
- Set small, achievable goals to build confidence and challenge these beliefs

POTENTIAL CHALLENGES DURING INITIATION PHASE

3. Lack of Confidence

Challenge: Your protégé may lack confidence in their abilities or potential.

Strategies:

- Provide specific, positive feedback on their strengths
- Assign stretch projects or tasks to help build confidence through achievement
- Encourage them to speak up in meetings and share their ideas
- Help them develop a personal brand statement that highlights their unique value

4. Unclear Expectations

Challenge: Your protégé may be unsure about what to expect from the advocacy relationship or what is expected of them.

Strategies:

- Clearly outline the goals and structure of the advocacy program
- Discuss and agree on mutual expectations early in the relationship
- Create a written agreement or charter for your advocacy relationship
- Regularly check in on whether expectations are being met and adjust as needed

POTENTIAL CHALLENGES DURING INITIATION PHASE

5. Resistance to Feedback

Challenge: Your protégé may be defensive or resistant when receiving constructive feedback.

Strategies:

- Build trust before giving challenging feedback
- Use the "feedback sandwich" method: positive, constructive, positive
- Frame feedback in terms of growth opportunities rather than criticisms
- Encourage your protégé to practice self-reflection and self-evaluation

6. Difficulty Building Rapport

Challenge: You and your protégé may struggle to build a comfortable, trusting relationship.

Strategies:

- Share personal stories and experiences to build a connection
- Find common interests outside of work
- Practice active listening and empathy in your interactions
- Be patient – building trust takes time

Remember, every relationship is unique, and you may encounter challenges not listed here. The key is to maintain open communication, be flexible in your approach, and always keep the best interests of your protégé and the organization in mind.

If you encounter persistent challenges that you're unsure how to address, don't hesitate to reach out to Mosaic Worx for additional guidance and support.

7 WAYS TO ADVOCATE YOUR PROTÉGÉ

While the next 60 days should be focused on building trust and rapport with your protégé, it's also important to start to think of activities that will give them more visibility and access to new opportunities with Wintrust. Here are some recommendations:

- 1 Bring your protégé with you to meetings to shadow you and learn through observation.
- 2 Put their name out there to others. Recommend them for a task force, committee, event, interim position, project team, or job opening —within your function and across to other groups.
- 3 Be direct in supporting them in talent reviews, succession planning, and other talent/performance processes.
- 4 Encourage other managers to see their potential and take the “risk” of putting them in roles, even if they do not fit the traditional image of a leader or is not viewed as “ready now.”
- 5 Recommend them for training or leadership development opportunities that are available for high-potential leaders.
- 6 Provide your protégé with exposure to senior leadership--presenting for the team, involvement in a high-priority project, etc.
- 7 Think about opportunities to bring people together. Who would benefit from knowing your protégé? Who should they know? And then make it happen. Book the 3 of you for lunch or coffee.

ADDITIONAL RESOURCES

- **Harvard Business Review Article:** [Sponsoring a Protégé — Remotely](#)
- **McKinsey & Company Report:** [Understanding organizational barriers to a more inclusive workplace](#)
- **Book:** [The Sponsor Effect: How to Be a Better Leader by Investing in Others](#)



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