



# Building a Successful & Valuable Advocacy Partnership

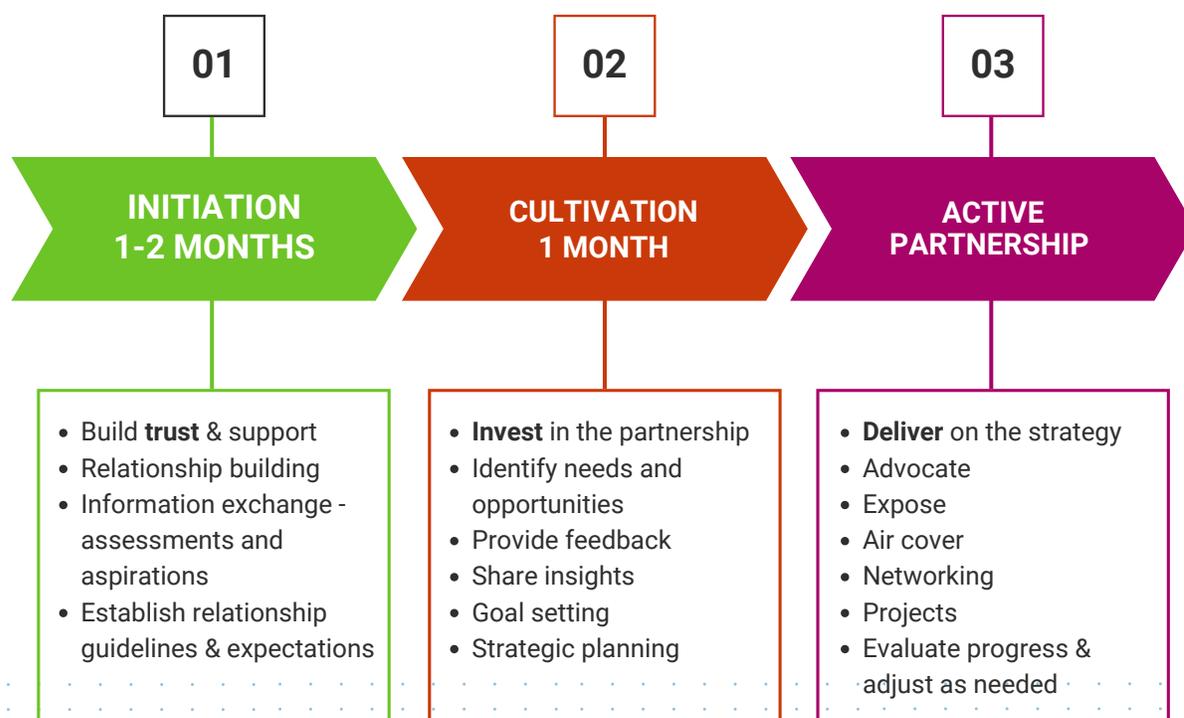
## PROTÉGÉ TOOLKIT #1

# 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 advocate, here are recommendations to prepare yourself and your mindset for a successful relationship.

- Be open to commonalities and differences.
- Don't hide what might be different about your experience at Wintrust.
- Be open; don't be defensive.
- Listen to think and understand feedback.
- Don't be afraid to share weaknesses, fears, concerns. Ensure your Advocate has the fullest picture of your career.

## PHASES OF THE ADVOCACY RELATIONSHIP



# WHAT ARE MY KEY RESPONSIBILITIES AS A PROTÉGÉ?

- Bring energy and enthusiasm to this two-way relationship. Build trust with your Advocate.
- Be open and honest, get to know your Advocate well, build on your commonalities, and be open to sharing your differences.
- Ensure your Advocate knows your work experience, achievements, approach to your work commitment, areas in need of improvement, and your career goals.
- Be receptive to feedback – make sure you understand the feedback and execute on it.
- Keep your commitments, be responsive and accessible to your Advocate.
- Be involved in Wintrus's diversity-related activities to increase awareness about the impact of the DEI strategy.



# 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 landed at Wintrust, your career evolution, your mistakes, challenges, and successes.
- Learn about your advocate – what your advocate is interested in, what projects your advocate is working on, and your advocate’s expertise.
- Don't forget to share and ask your advocate about non-work information. What are they passionate about? What do they like to do in their spare time? What makes them happy?

### ② Set expectations for the advocacy relationship

- Share your commitment to the relationship and ensure you know what your advocate is expecting of you.
- Discuss frequency, the preferred method of communication, etc
- Make sure to be accessible and flexible – follow through consistently on the commitments that you make with your advocate.
- Discuss how you both will assess how the relationship is progressing

### ③ Give your advocate the information needed so they can start to think about how to direct their efforts on your behalf.

- What are your goals and aspirations? Needs? Challenges? Opportunities? Experiences? Concerns?



# ADVOCACY SESSION AGENDAS

As part of the Initiation phase, over the next 60 days, we recommend that you have at least three meetings with your advocate 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 ADVOCATE

*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 do you like best about your work?
- What have been your biggest successes at Wintrust?
- What skills have been most beneficial to you? Have you had any defining moments that you'd say have shaped your career path?
- I'm interested in X and Y. Where do we start? How will we best work together?
- Let's clarify objectives and expectations.

# PROPOSED AGENDA FOR MEETING #2

*START TO IDENTIFY AREAS YOUR ADVOCATE CAN  
PROVIDE ADVOCACY, OPPORTUNITIES FOR GROWTH*

- I'm struggling with this. Have you been through something similar?
- This is what's been going on with me – what's your take?
- Tell me about a failure and what you learned from it.
- These are what I see as my strengths and weaknesses. How are they affecting my success now?
- How do I build on or leverage my successes in current role?
- I think there's a gap between what I'm doing and known for, and where I'd like to be. What insight can you share about creating my leadership brand or clarifying my unique value?



# PROPOSED AGENDA FOR MEETING #3

*START TO DISCUSS YOUR CHALLENGES AND LEVERAGE YOUR ADVOCATE TO DEEPEN YOUR THINKING ABOUT YOUR STRENGTHS*

- What obstacles have you faced in your career? What might I do about this challenge? What can I learn?
- I'm struggling with this feedback I received. Could you help me think it through?
- How could I prepare for this upcoming event/challenge?
- How am I getting in my own way? What else could be holding me back?
- I've been successful in this area/comfortable with this type of work. What might give me a new challenge?





# NAVIGATING COMMON CHALLENGES

## BUILDING RESILIENCE IN YOUR ADVOCACY PARTNERSHIP

Even the most well-intentioned advocacy relationships can encounter obstacles during the initiation phase. Being prepared for these challenges and having strategies to address them will help you maintain momentum and build a stronger partnership.

### COMMON CHALLENGES & SOLUTIONS

#### When Your Advocate Seems Too Busy

##### The Challenge:

Your advocate frequently reschedules meetings, responds slowly to communications, or seems overwhelmed with their workload.

##### SOLUTIONS:

- **Be flexible with scheduling:** Offer multiple time options and suggest shorter meeting durations (even 15-20 minutes can be valuable)
- **Come prepared:** Always have a clear agenda and specific questions to maximize your time together
- **Leverage alternative communication:** Ask if they prefer brief email updates, voice messages, or quick check-ins via their preferred platform
- **Respect their calendar:** Suggest meeting during their preferred times or propose walking meetings if they're more available during those moments

**Remember:** A busy advocate often indicates they're influential and well-connected - exactly the type of advocate you want.



# NAVIGATING COMMON CHALLENGES

**When Follow-Through Falls Short The Challenge:** Your advocate agrees to make introductions, provide feedback, or take specific actions but doesn't follow through within the expected timeframe.

## SOLUTIONS:

- **Send gentle reminders:** Follow up with a brief, friendly message after a reasonable timeframe (typically 2-3 weeks)
- **Make it easy:** Provide all necessary information upfront (email addresses, context for introductions, specific deadlines)
- **Offer alternatives:** "If connecting me with [person] isn't possible right now, could you suggest someone else who might be helpful?"
- **Address it directly:** If it becomes a pattern, have an honest conversation about expectations and bandwidth

**Tracking Commitments and Progress The Challenge:** Important agreements and action items fall through the cracks without a clear system for tracking progress.

## SOLUTIONS:

- **Create a shared tracking system:** Use a simple shared document or project management tool to track commitments, deadlines, and progress
- **Send meeting summaries:** After each conversation, send a brief email summarizing key takeaways and agreed-upon next steps
- **Use an advocacy journal:** Keep personal notes on discussions, insights, and action items to reference in future meetings
- **Regular check-ins:** Schedule brief monthly reviews to assess progress on goals and commitments





# NAVIGATING COMMON CHALLENGES

**Misaligned Expectations The Challenge:** You and your advocate have different understandings of the relationship scope, frequency of contact, or expected outcomes.

## SOLUTIONS:

- **Create an advocacy charter:** Document mutual expectations, meeting frequency, communication preferences, and success metrics
- **Ask clarifying questions:** "What does success look like to you in this relationship?" or "How can I best prepare for our time together?"
- **Be explicit about needs:** Clearly communicate what type of support would be most valuable to you
- **Regular realignment:** Schedule periodic discussions to ensure you're both still aligned on goals and approach

**Lack of Chemistry or Connection The Challenge:** Despite best efforts, the relationship feels forced or lacks natural rapport.

## SOLUTIONS:

- **Give it time:** Authentic relationships take time to develop - commit to at least 3-4 meaningful interactions before assessing fit
- **Find common ground:** Look for shared experiences, interests, or professional challenges that can serve as connection points
- **Be authentic:** Share genuine stories and vulnerabilities rather than trying to present a perfect image
- **Seek feedback:** Ask your advocate what they find most engaging about your conversations and adjust accordingly



# NAVIGATING COMMON CHALLENGES

**Unclear on How to Add Value The Challenge:** You want to make the relationship mutually beneficial but aren't sure how to contribute value to your advocate.

## SOLUTIONS:

- **Ask directly:** "How can I be helpful to you or your team?"
- **Share relevant insights:** Offer perspectives from your role, generation, or background that might be valuable to them
- **Make strategic introductions:** Connect your advocate with others in your network when appropriate
- **Volunteer for their initiatives:** Offer to help with projects, presentations, or committees they're leading
- **Provide market intelligence:** Share relevant industry trends, competitive insights, or customer feedback from your vantage point



# PROACTIVE STRATEGIES FOR SUCCESS

## SET UP SYSTEMS FROM THE START

- Establish a regular meeting cadence and stick to it
- Create templates for agenda items and follow-up communications
- Use calendar tools to send automatic reminders for commitments
- Designate specific times for advocate-related activities in your schedule

## BUILD IN BUFFER TIME

- Allow extra time between commitments and deadlines
- Plan for occasional rescheduling without derailing progress
- Set internal deadlines that are earlier than external ones

## COMMUNICATE PROACTIVELY

- Share updates on your progress even when not asked
- Give advance notice if you need to reschedule or adjust timelines
- Ask for feedback regularly rather than waiting for formal reviews

## MAINTAIN PROFESSIONAL PERSPECTIVE

- Remember that setbacks are normal and don't reflect on your worth
- Focus on what you can control (your preparation, follow-through, and attitude)
- View challenges as opportunities to demonstrate resilience and problem-solving skills



# RED FLAGS TO WATCH FOR

While most challenges can be worked through, be aware of these concerning patterns:

- Consistent cancellations without rescheduling
- Broken commitments without acknowledgment or explanation
- Dismissive or disrespectful communication
- Requests that make you uncomfortable or seem inappropriate
- Lack of engagement despite multiple attempts to connect

If you encounter persistent red flags, consider discussing the situation with HR or your program coordinator to explore alternative advocate matches.

# TURNING CHALLENGES INTO STRENGTHS

Remember that successfully navigating obstacles together often strengthens advocacy relationships. When you handle challenges professionally and constructively, you demonstrate exactly the kind of leadership qualities your advocate wants to support. Each challenge overcome is an opportunity to build deeper trust and showcase your potential.

# ADDITIONAL RESOURCES

- Article: [The Relationship You Need to Get Right](#)
- Podcast: [Episode 125- Carla Harris on Why You Need A Sponsor Not A Mentor](#)
- Book: [Forget a Mentor, Find a Sponsor: The New Way to Fast-Track Your Career](#)

