Positioning BRGs for success: leader identification and support

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Agenda

- Wells Fargo BRG Story
- Fire side Chat
- Effective BRG Sponsors
- Leveraging BRG Experience
Mobilizing our Diversity & Inclusion Ecosystem

**Team Member Network (TMN) Leadership Board**
TMN Presidents, TMN Consultants

- Asian Connection
- My Generation Team Member Network
- Native Peoples Team Member Network
- Women's Team Member Network
- Veterans' Team Member Network
- Black/African American Team Member Network
- Latin Connection
- PRIDE Team Member Network

**Enterprise Diversity and Inclusion Council**
D&I Strategic Thought Leaders Led by CEO

**Ecosystem Key Partners/Functions**

- Talent Acquisition
- Talent Planning & Development
- HR
- Corp Comm
- EEO/AA
- Gov & Comm Relations
- Supplier Diversity
- Market Segments

**D&I Consultants**

**D&I Councils/Teams**

- Line of Business (LOB) D&I Councils
- D&I Tactical Teams
- Local Site D&I Teams
- Cross-LOB Regional D&I Councils

**All Team Members**
D&I Ecosystem: Mobilization Transit Map

**Networks Councils**
- Social

**Culture Change**
- Status Quo
- "Them"
- LOB Silo
- Compliance
- ERGs
- Matrix
- Centralized

**Story Telling**
- Personal experience
- SWOT

**Learning**
- Business case
- Message
- Analytics
- Skills-building

**Accountability**
- Leader specific
- Segmented

**Strategy**
- Vision
- Goals & objectives
- Tactics
- Resources
- Business plans
- Leader behaviors
- Ownership
- Critical
- Cultural competence
- Global mindset
- Embedded
- Integrated
- Compensation
- Business led
- Talent Driver
- Value Driver
- BRGs
- Scorecard
- Innovation
- ROI & impact

**D&I**
- EDI
- Cultural competence
- Scaling
- Integrated
- Business plans
- Talent Driver
- Value Driver
- BRGs
Network path and complexity

Networks Councils

Social

Centralized

ERGs

EDI

Business plans

Talent Drivers

Business led

Value Driver

BRGs

Team Member Network Leadership Board

- 323 chapters
- >1,900 leader roles
- Full count 78,945
- Distinct count 50,485
We’ve been building a leading-edge program

2007 → 2016

Strengthening Infrastructure
Integration of TMNs
Membership database and reports
Centralized TMN Portal; Team Moments

Growing capabilities
Enterprise TMN Leader identification process
Enterprise TMN leader Support Strategy
Chapter & Regional Leader Support Strategy

Evolving processes
Guidelines and policies
Annual Planning processes
Enhancing Metrics & reporting

Sustaining Relevancy
Annual surveys & feedback mechanisms
TMN Expansion
TMN Marketing Campaign

Increasing our ability to deliver value
Step 1. Position TMN leader roles as high impact development opportunities

Strategic and intentional use of talent data to match leaders with opportunities to:

- Enhance Wells Fargo’s reputation in the communities we serve
- Apply their expertise outside their day-to-day role
- Help lead and shape our culture of inclusion and build “muscle” in terms of leading across difference
- Develop new skills through powerful, experiential development

Experience-based development opportunity

### Source Talent

- Key considerations in the sourcing process include:
  - Diverse slates
  - Organizational needs
  - Individual interests
  - Development needs
  - Career goals

### Develop Talent

- Select talent for experience based opportunity or role:
  - Non-profit board service
  - TMN Leadership Role
  - Diversity Council Leadership Role
  - Special project or assignment
  - Open executive/senior leader role
Step 2: Develop leadership support framework

**Match Talent & Opportunity**
- Consult with requestor to understand opportunity and needs
- Identify leaders who benefit from the experience
- Identify leaders with strengths to maximize business impact

**Development support**
- High-touch support
  - Support toolkit with guidance for priority roles
    - Peer partner
    - Check-ins
    - Consulting support
    - Feedback loop
    - Role exit
- Self-service support
  - Self-service learning site with resources
    - Getting started
    - Key skills
    - Common challenges
    - Policies
    - Role exit

**Follow-up**
- Measurement, tracking, and reporting
- Evaluation of the experience
- Leveraging experience in primary role(s)

**Well managed communications**

Strategic partnerships with Diversity & Inclusion, Government & Community Relations, and Business Unit talent managers
### Step 3: Build self-service support site

<table>
<thead>
<tr>
<th>Section</th>
<th>Components</th>
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</thead>
<tbody>
<tr>
<td><strong>Considering TMN Leadership</strong></td>
<td>Provides information on D&amp;I Strategy, TMN program, roles, responsibilities with link to on-line nomination form</td>
</tr>
<tr>
<td><strong>TMN Leaders</strong></td>
<td>Getting started, Effectively executing, Planning your development, Closing my TMN leader role</td>
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<tr>
<td><strong>Manager of TMN Leaders</strong></td>
<td>Overview of TMN Program, roles, responsibilities; How to support your direct report in their TMN leader role; FAQs</td>
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<tr>
<td><strong>Human Resources</strong></td>
<td>Overview of TMN Program, roles, responsibilities; How to support your client(s) in their TMN leader role; specific content for TMN Consultants and HR Liaisons</td>
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<tr>
<td><strong>Resources</strong></td>
<td>List of tools/resources from throughout the site</td>
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Considering TMN Leadership

- What do I need to consider about TMN Leadership?
- TMN Leader roles
- How do TMN leaders get nominated selected?
- Is TMN Leadership a fit for me?
- Making a TMN Leadership Commitment
TMN Leader

- Getting started in my role
- Executing effectively my TMN Leader role
  - Key leadership processes (e.g., annual plans, succession)
  - Skills for network leaders
    - Engaging in courageous conversations, Influencing others, Presenting effectively, Promoting D&I, Coaching & Feedback, Motivating & Enabling
  - Guidelines and policies
  - Common Challenges
  - Resources for TMN leaders
- Planning my development
- Closing my TMN leader role
Planning my development
Competency assessment

<table>
<thead>
<tr>
<th>Competency self-assessment: Manager</th>
<th>Competence</th>
<th>Passion</th>
<th>Organizational Needs</th>
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<tr>
<td>Displays high integrity and honesty</td>
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<td>Innovates</td>
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<td>Practices self-development</td>
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<td>Solves problems and analyzes issues</td>
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<td>Technical/professional expertise</td>
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<td>Drives for results</td>
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<td>Establishes stretch goals</td>
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<td>Takes initiative</td>
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<td>Builds relationships</td>
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<td>Collaboration and teamwork</td>
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<td>Communicates powerfully and prolifically</td>
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<td>Develops others</td>
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<td>Inspires and motivates others to high performance</td>
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<td>Connects the group to the outside world</td>
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<td>Develops strategic perspective</td>
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<td>Champions change</td>
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Interpreting your self-assessment...

Your goal is to find development opportunities that align your Competence, Passion, and Organizational Needs, your sweet spot. Use the chart below to pick the competencies for your personal development.

**First choice**
You have high competence, passion for, and the organizational group needs the competency (sweet spot).

**Another choice**
You have passion for and the organizational group needs this competency.

**Another choice**
You have competence and passion for the competency.

**Best practice**
Schedule some time to meet with your manager. He or she may have additional areas you need to develop to be successful in your role.

These competencies are the property of Zenger Folkman Company and are taken from *The Extraordinary Leader™* and *The Extraordinary Performer™* leadership development models. © 2012 Zenger Folkman Company, all rights reserved. Used with permission.
Key players to ensure success
Dual Advisor structure

1 of Segment, 1 not of Segment

Benefits of dual advisors

- Assist the TMN leadership and members to better understand Wells Fargo’s business imperatives and management’s expectations
- Ensure TMN linkage and access to Wells Fargo management
- Bring different backgrounds, experiences and resources to enhance the advisor role and contributions to the TMN, especially the diversity and leadership development of Advisors and TMN leaders
- Share responsibilities and accountability for the success of the network
- Cross-mentor each other and increase learning about diversity leadership
- Ensure the Advisor team has knowledge and understanding of the TMN members’ experiences and unique needs
- Provide the opportunity for leadership and diversity development to a broader base of executive talent

Responsibilities

- **Evangelist**: Champion, advocate and broker for the TMN and is fully engaged as an active, committed partner
- **Innovator**: Energize and provide counsel to Enterprise TMN leaders to enhance performance, engagement, hold accountable and drive business impact
- **Strategic**: Provide management perspective and insight into Wells Fargo’s business imperatives, management expectations and corporate culture
- **Mentor and Coach**: Actively participate in talent development for the Enterprise TMN leadership, including selection, coaching, mentoring, development and succession planning
- **Lead self**: Take personal responsibility for developing own diversity and leadership skills
Key Offerings

All of JBC’s customized offerings are developed to most effectively enact organizational change, with embedded change management best practices throughout.

Providing strategic planning support: JBC can develop strategies for companies just getting started, or review and refresh existing strategies, all with a four-step change process. This includes D&I Council support, as well as end-to-end ERG/BRG strategic programs. Our ERG expertise is broadly acknowledged; our well-regarded whitepaper can be found [here](#).

Coaching and consulting: JBC can work with your executive team to encourage greater involvement and sponsorship, promote the business case, elevate diverse talent, and deepen understanding. Consider providing them with our [Executive Sponsor white paper](#).

Designing or updating Diversity and Inclusion and Unconscious Bias training: JBC has extensive experience designing and delivering awareness and skill building programs for managers, and for entire employee populations, both in the classroom and via webinars.

Providing spotlight learning and external speakers: JBC delivers talks and presentations on workplace trends including Gender, Ethnicity, Generations, LGBT and Allies, Disability, and other emerging definitions of diversity, including diversity of thought and communication style.

Delivering leadership training: With our particular focus on high potentials, JBC can help young leaders develop their critical ability to lead in a multi-generational, virtual, and fast-changing workplace.
The Challenge of Transformation

Executive Sponsors can be catalysts, guides, and champions of the changes.

ERGs must demonstrate their value proposition to be taken out of silos and embedded throughout the organization.

COMPANIES must look at their old ways of doing business and take advantage of missed opportunities.

It is through honest self-reflection and willingness to change that organizations will be able to access the untapped innovation that already lies within.
Our experience suggests that Executive Sponsors are the single most under-utilized resource within ERGs.
Lead Like the Business Leader You Are

What makes executive sponsorship different?
- Inclusive leadership amplified
- Voluntary workforce, motivated by personal passion
- Deep subject matter expertise, in need guidance in translating to business results
- Too often characterized by lack of clarity, structure or accountability

Run it like a business
Utilize the leadership skills and business competency that got you to where you are.
Exploring Five Key Roles

- Strategist
- Evangelist
- Innovator
- Broker
- Mentor
Partner with the group to articulate a mission, vision, and goals aligned with the organization’s business, talent, or diversity and inclusion goals.

Focus the group’s ambitions and strike an appropriate balance between the interests of local chapters and the goals of the national network.

Evaluate the group’s structure and governance and recommend re-engineering when necessary, with an eye toward enhancing effectiveness, visibility, and impact.

**A strategist defines a mission and vision for the ERG, gathers the information needed to make critical decisions, and provides proactive counsel to help achieve greater goals.**
JBC Executive Sponsor Five Key Roles℠

- Convince executives and middle managers of the value of the ERG.
- Elevate discussions about growing membership and increasing engagement.
- Advocate for the ERG’s position on signature issues.

An evangelist is a public advocate for not only the ERG itself, but also the causes the group supports.
JBC Executive Sponsor Five Key Roles℠

Innovator

- Cut through red tape.
- Leverage the position’s power to procure needed resources.
- Bring new resources and ideas to the table, with the goal of encouraging the ERG leader and members to identify new ways to make a difference or look at an obstacle as a road to a new opportunity.

An innovator uses creativity to identify improvements in structure or governance and initiate new methods or ideas to solve inefficiencies.
JBC Executive Sponsor Five Key Roles℠

- Connect ERG to funds and people in the company.
- Share information about company priorities and initiatives.
- Connect the company to the concerns of ERG members.
- Make connections to important people and organizations outside the company.

A broker has the ability to reach influential leaders to arrange or negotiate resources or access for growth opportunities.
JBC Executive Sponsor Five Key Roles℠

- Teach professional and leadership skills.
- Provide career advice.
- Model “bringing your whole self to work.”

A mentor nurtures talent, fosters potential, and develops excellence in others.
Creating Higher Impact for Executives

Alignment
- To things they care about

Credibility
- Credo + Ability
  (who you say you are + and what you do/deliver)

Visibility
- Impact, not just activity
- Transparency
- Why should we invest in your work? Why should we show up?
Creating Higher Impact for Executives

Alignment
- What do they want and expect you to be aligned to?
- What is it they care about?

Credibility
- How will they measure your credibility?
- By your ability to do what?

Visibility
- What do they need to see and hear to continue to invest?
Members – Any employee who visits the internal site to learn more about the initiative

Allies – Any interested employee who signs the online Pledge to become a gender Ally

Advisors – Up to 30 VP level leaders globally, who have made public pledge and personal commitment to acting as Gender Allies, and who will guide the development and results of the MFI Network

Steering Team – 6-9 VP level Advisors, providing strategic leadership and oversight to MFI program

Executive Sponsors - 2 VP or above visible and committed executives, demonstrating ownership for MFI organization, operations and results
Be one of the first to find out about Jennifer's new book *Inclusion: Diversity, the New Workplace, and the Will to Change* - coming in October!

www.inclusionthebook.com
Marketplace impact and value

- Creation of Accredited Domestic Partner Advisor Program
- Language guidance on financial forms
- Wells Fargo support and Video – It Gets Better
- Provide market insight on “learning sign language video”
- Influence Transgender guidelines and transitioning toolkits
- Transgender banking customer guidance

Market engagement and participation in 50+ PRIDE parades
Questions