

# Positioning BRGs for success: leader identification and support

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## **Jennifer Brown**

President

Jennifer Brown

Consulting

## **Bryan Gingrich, Ph.D.**

SVP, Enterprise D&I Leader

Wells Fargo

## **John Stotler**

PRIDE President

Technology Manager

Wells Fargo

October 2016

Together we'll go far



# Agenda

**Wells Fargo  
BRG Story**



**Fire side  
Chat**



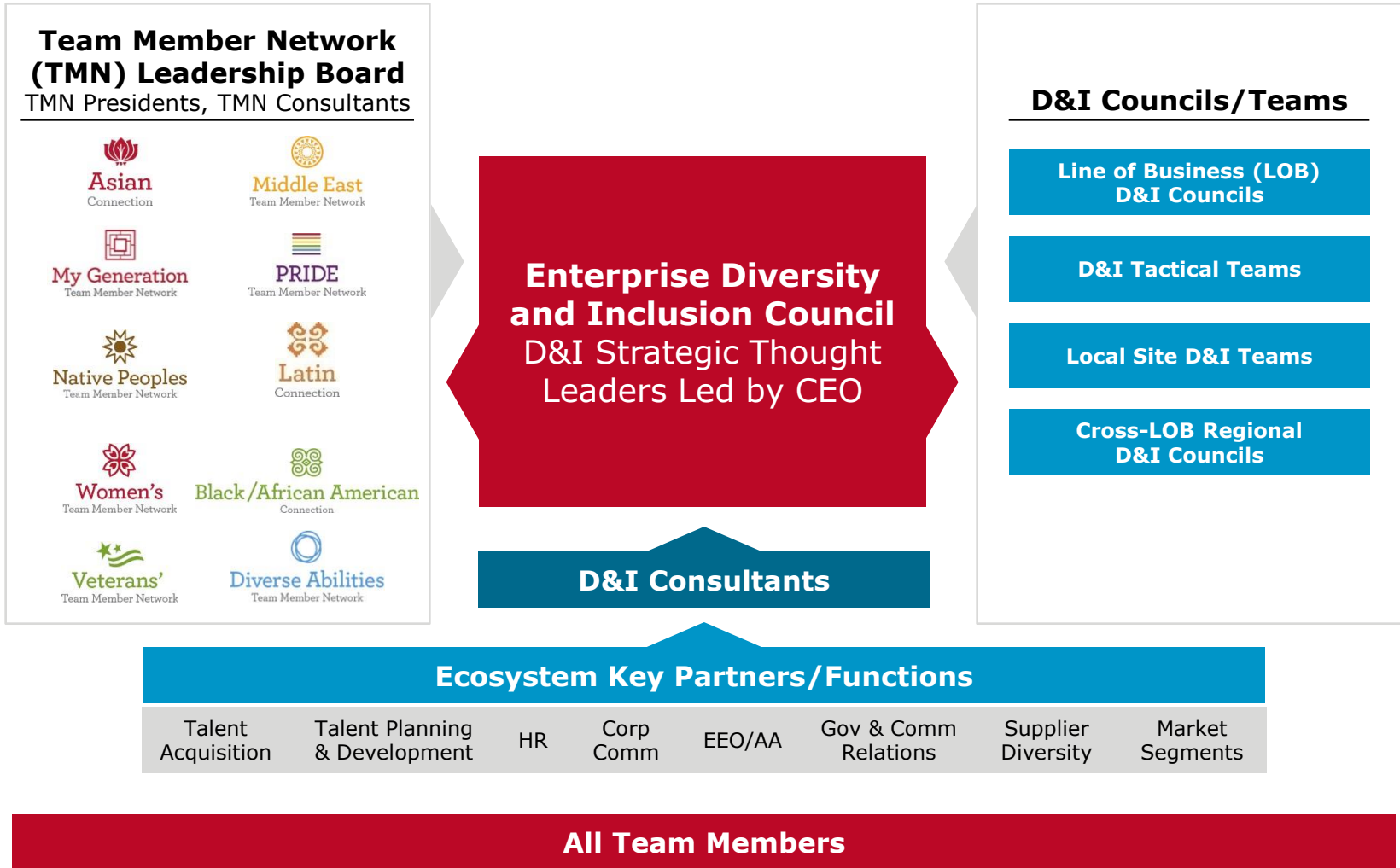
**Effective  
BRG  
Sponsors**



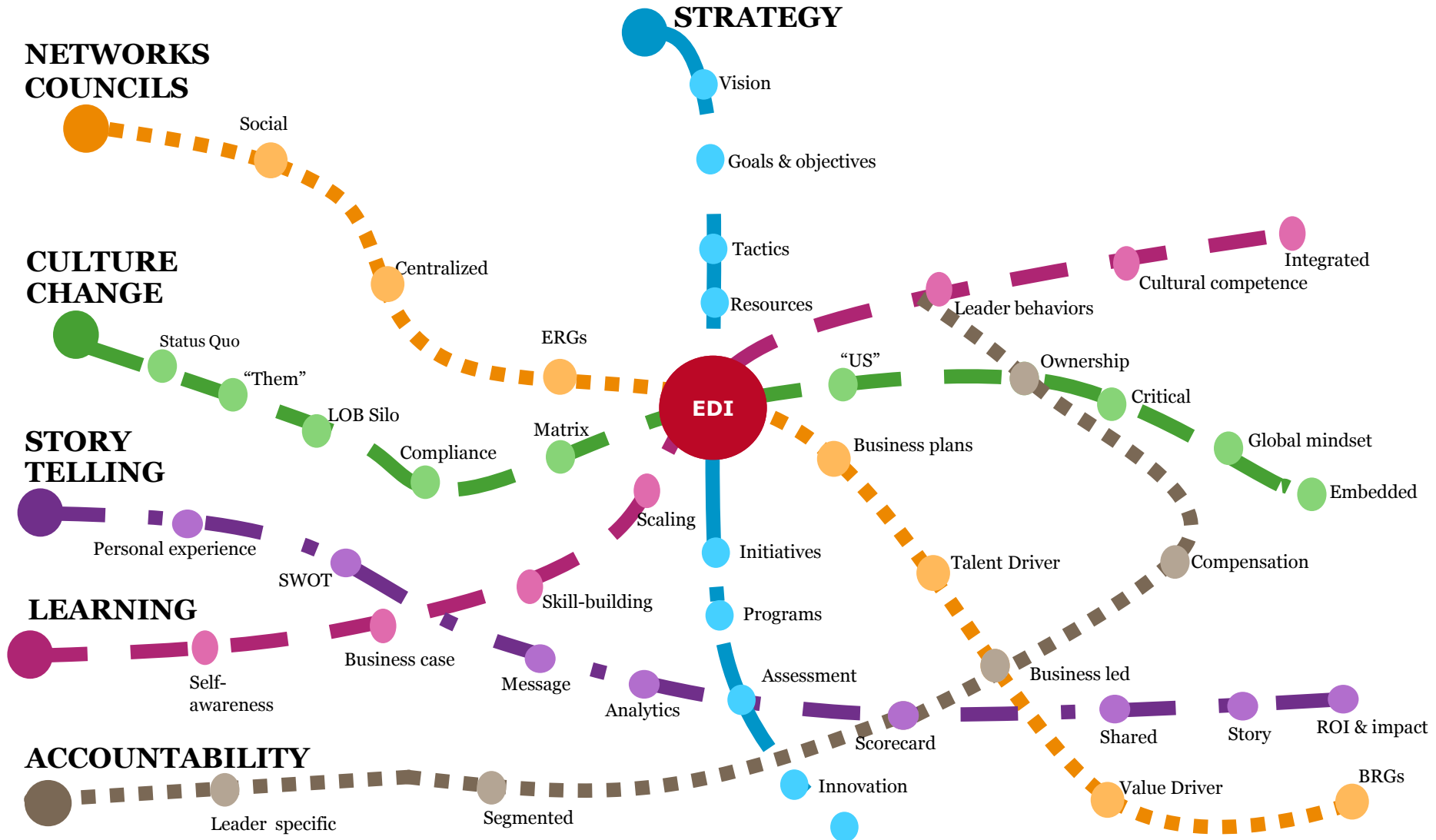
**Leveraging  
BRG  
Experience**



# Mobilizing our Diversity & Inclusion Ecosystem

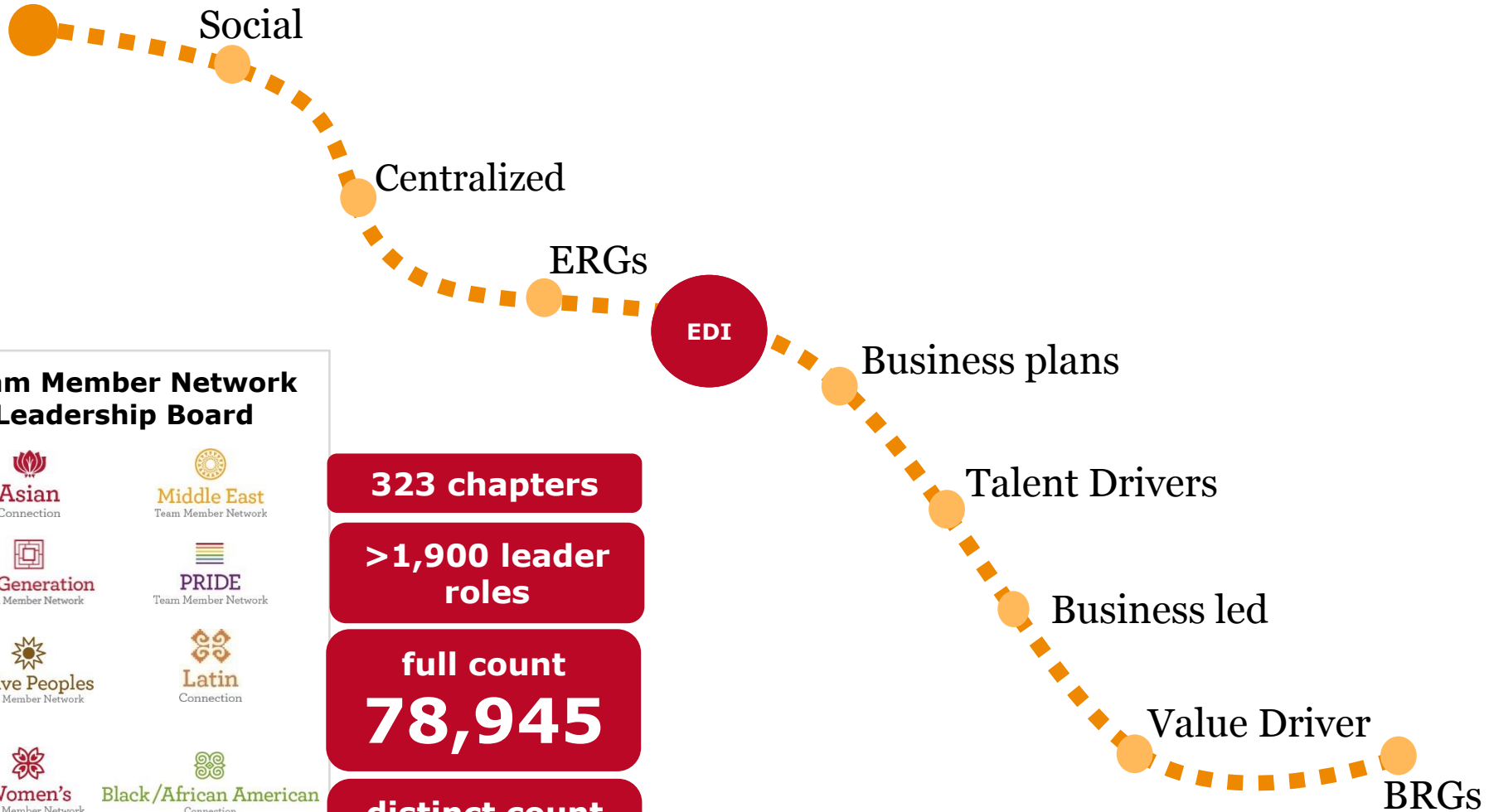


# D&I Ecosystem: Mobilization Transit Map



# Network path and complexity

## NETWORKS COUNCILS



### Team Member Network Leadership Board

 <b>Asian</b> Connection	 <b>Middle East</b> Team Member Network
 <b>My Generation</b> Team Member Network	 <b>PRIDE</b> Team Member Network
 <b>Native Peoples</b> Team Member Network	 <b>Latin</b> Connection
 <b>Women's</b> Team Member Network	 <b>Black/African American</b> Connection
 <b>Veterans'</b> Team Member Network	 <b>Diverse Abilities</b> Team Member Network

**323 chapters**

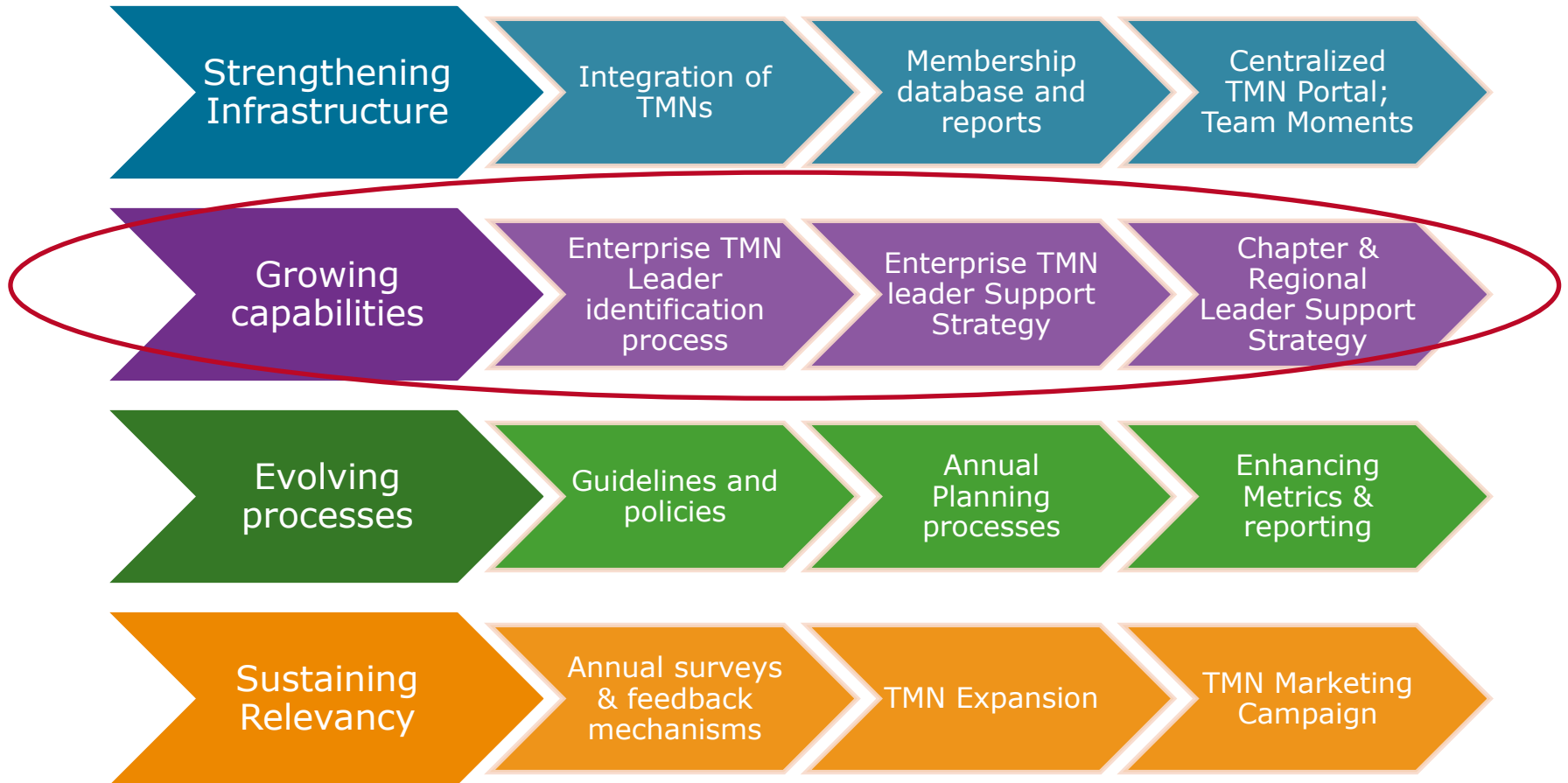
**>1,900 leader roles**

**full count  
78,945**

**distinct count  
50,485**

# We've been building a leading-edge program

2007 → 2016

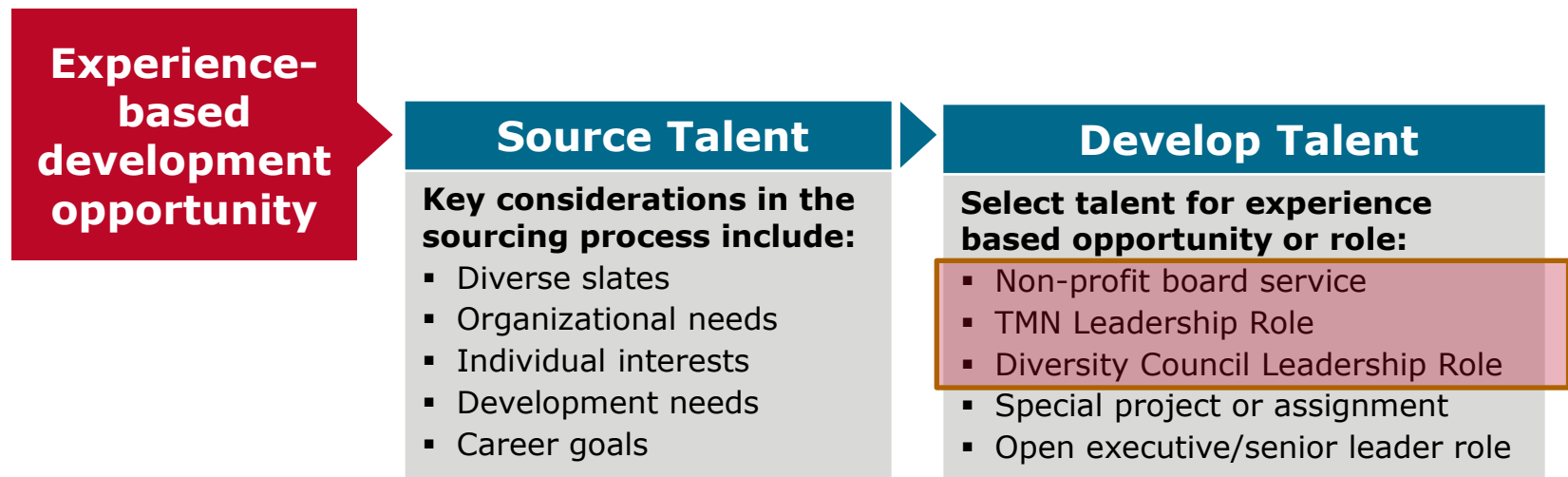


## Increasing our ability to deliver value

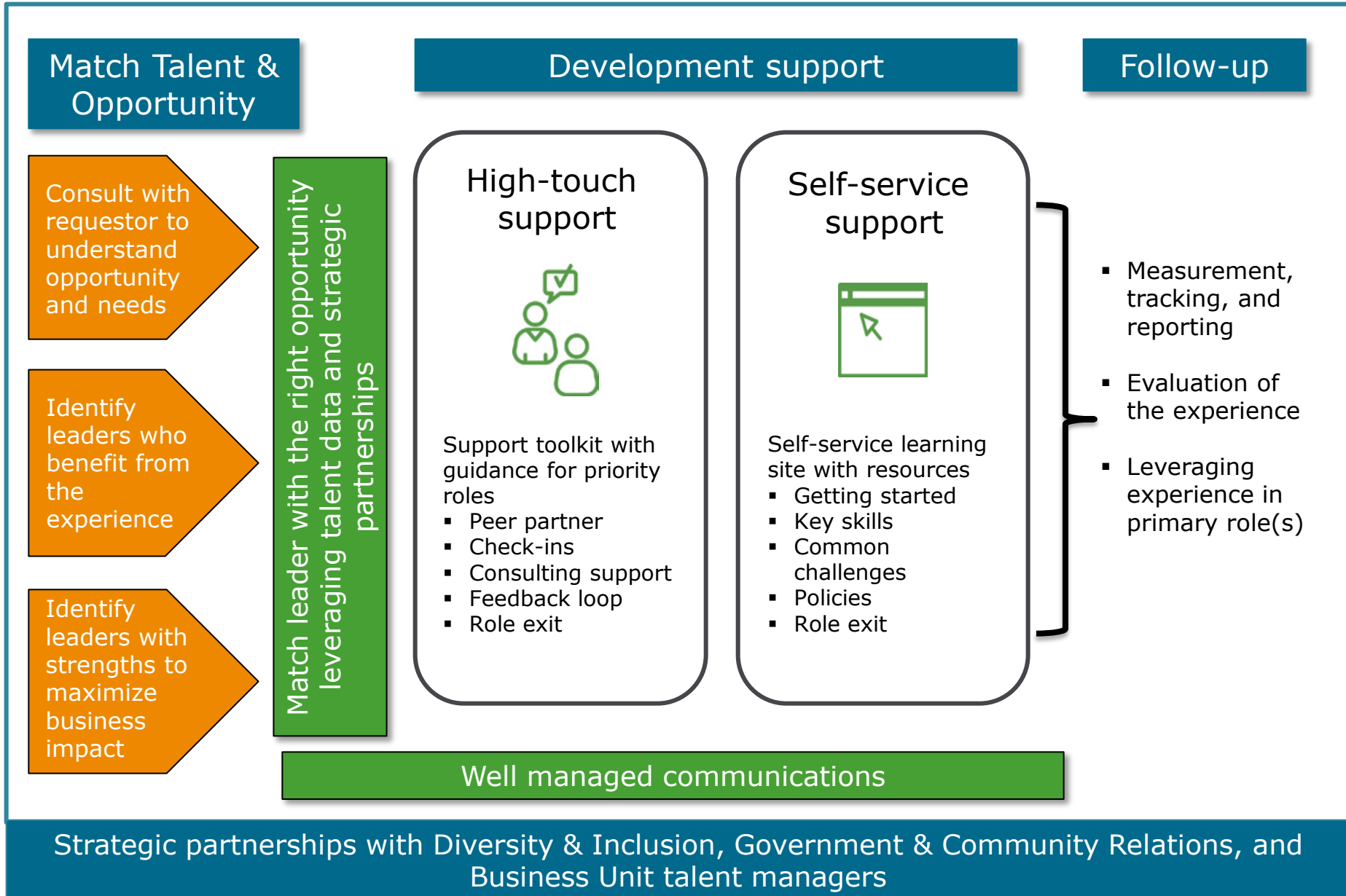
# Step 1. Position TMN leader roles as high impact development opportunities

## 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

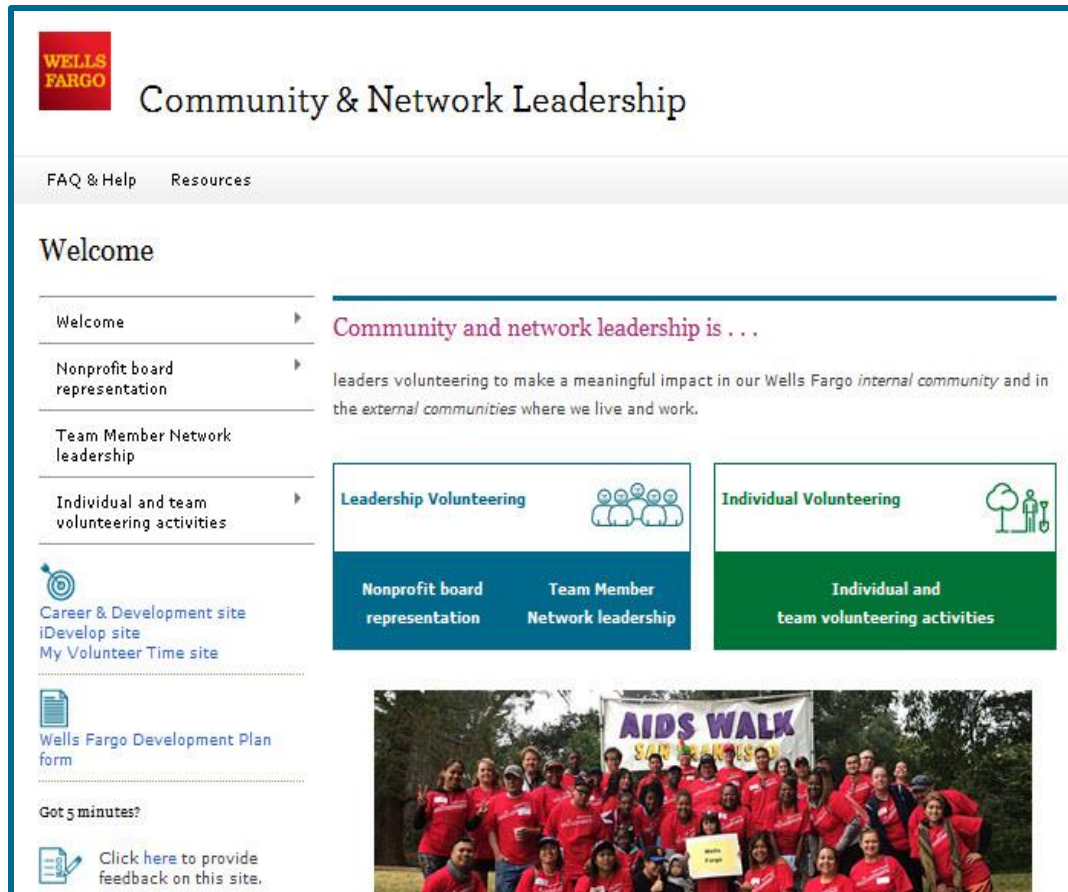


# Step 2: Develop leadership support framework





# Step 3: Build self-service support site



Section	Components
<b>Considering TMN Leadership</b>	<ul style="list-style-type: none"> <li>Provides information on D&amp;I Strategy, TMN program, roles, responsibilities with link to on-line nomination form</li> </ul>
<b>TMN Leaders</b>	<ul style="list-style-type: none"> <li>Getting started</li> <li>Effectively executing</li> <li>Planning your development</li> <li>Closing my TMN leader role</li> </ul>
<b>Manager of TMN Leaders</b>	<ul style="list-style-type: none"> <li>Overview of TMN Program, roles, responsibilities; How to support your direct report in their TMN leader role; FAQs</li> </ul>
<b>Human Resources</b>	<ul style="list-style-type: none"> <li>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</li> </ul>
<b>Resources</b>	<ul style="list-style-type: none"> <li>List of tools/resources from throughout the site</li> </ul>

# 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

What do I need to consider about TMN leadership?

Welcome

Nonprofit board representation

Team Member Network leadership

Individual and team volunteering activities

**Common responsibilities of TMN leaders**

Each TMN leader role has unique requirements. Here are some of the most **common responsibilities** that you are likely to encounter.

Click each tab below to reveal more information.

Business plan | Finances | Guidelines & policies | Meetings | Commitment

- Support Enterprise TMN in establishing and implementing the annual business plan to drive our Diversity and Inclusion strategy.
- Inspire and motivate TMN members to actively participate in achieving TMN business plan.
- Seek opportunities to collaborate across TMNs.

Career & Development site  
Develop site  
My Volunteer Time site

Wells Fargo Development Plan form

Personal interests and skills self-assessment  
(for TMN leaders)

**Purpose**  
Use this self-assessment to evaluate those areas where you have passion.

**Networks I am passionate about**  
Is there a network you have a connection to or an affinity for that you are passionate about? Check the box below with the rating that best represents how you feel about each organization.

	1	2	3	4	5
Accounting/Finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business development and customer insight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brand and reputation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Diversity and inclusion personal journey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Event planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inclusive environment and employee engagement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Influence management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leading a volunteer group	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Talent development and professional growth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teamwork	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Skills I want to build

Are there particular skills that you would like to build? Check the box below with the rating that best represents how you feel about each skill.

	1	2	3	4	5
Accounting/Finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business development and customer insight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Other:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Rating goal:** Look at the skills you marked with a "5." Are there > 3 skills that you would like to build? Look for networks where you can use your skills to help them.

Skills I have to offer

Are there particular skills that you can offer a network? Check the box below with the rating that best represents how you feel about each skill.

	1	2	3	4	5
Accounting/Finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business development and customer insight	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brand and reputation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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**Rating goal:** Look at the skills you marked with a "5." Are there > 3 skills that you would like to offer to a particular network? Look for networks where you can use your skills to help them.

# 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

Common challenges I may encounter . . .

Click each blue bar below to learn more about a challenge.

- [+] Ensuring event participation
- [+] Holding my TMN leaders accountable for their commitments
- [+] Including TMN activity in my performance objectives or development plan

Description	Best practice advice	Additional resources
<ul style="list-style-type: none"><li>• TMN leadership provides the opportunity to leverage your strengths and expertise to impact a critical component of Wells Fargo's success.</li><li>• It also provides the opportunity to develop new skills, use muscles you might not have used in a while, and to tackle new challenges along the way.</li><li>• TMN leadership is an impactful way to develop, grow, and advance capabilities.</li></ul>		

- [+] Managing my time
- [+] Managing my TMN communications
- [+] Moving into leading a TMN team
- [+] Recruiting event volunteers

# Planning my development

## Competency assessment

**Competency self-assessment: Manager**

- Click your top six competencies in each column, using the question in that column to help you define your competence, passion and organizational needs.
- Hover over each competency for its definition.
- See the next page to interpret your results.
- Save to your desktop and/or print.

	Competence Where am I most proficient?	Passion Where do I have the greatest commitment and energy?	Organizational needs What is most critical for me to be successful in my role?
Character	Displays high integrity and honesty	<input type="checkbox"/>	<input type="checkbox"/>
	Innovates	<input type="checkbox"/>	<input type="checkbox"/>
Personal Capability	Practices self-development	<input type="checkbox"/>	<input type="checkbox"/>
	Solves problems and analyzes issues	<input type="checkbox"/>	<input type="checkbox"/>
	Technical/professional expertise	<input type="checkbox"/>	<input type="checkbox"/>
Focus on Results	Drives for results	<input type="checkbox"/>	<input type="checkbox"/>
	Establishes stretch goals	<input type="checkbox"/>	<input type="checkbox"/>
	Takes initiative	<input type="checkbox"/>	<input type="checkbox"/>
Interpersonal Skills	Builds relationships	<input type="checkbox"/>	<input type="checkbox"/>
	Collaboration and teamwork	<input type="checkbox"/>	<input type="checkbox"/>
	Communicates powerfully and proactively	<input type="checkbox"/>	<input type="checkbox"/>
	Develops others	<input type="checkbox"/>	<input type="checkbox"/>
Leading Change	Inspires and motivates others to high performance	<input type="checkbox"/>	<input type="checkbox"/>
	Connects the group to the outside world	<input type="checkbox"/>	<input type="checkbox"/>
	Develops strategic perspective	<input type="checkbox"/>	<input type="checkbox"/>
	Champions change	<input type="checkbox"/>	<input type="checkbox"/>

### 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).

Do you have **three** black squares like this?

Builds relationships

Competence	Passion	Org. Needs
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

#### DO THIS...

- Select the sweet spot competency to develop into a profound strength (something you do really well).
- If you have multiple sweet spots, speak with your manager about where you should focus your development.

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

Do you have **two** colored squares like this?

Drives for results

Competence	Passion	Org. Needs
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

#### DO THIS...

- Determine the 1-2 competencies where you:
  - Have the most passion and/or interest, or
  - Can make the biggest difference in your current role
- Talk to your manager about your individual competence and how you can best apply this competency in your role.

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

Do you have **two** colored squares like this?

Innovates

Competence	Passion	Org. Needs
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

#### DO THIS...

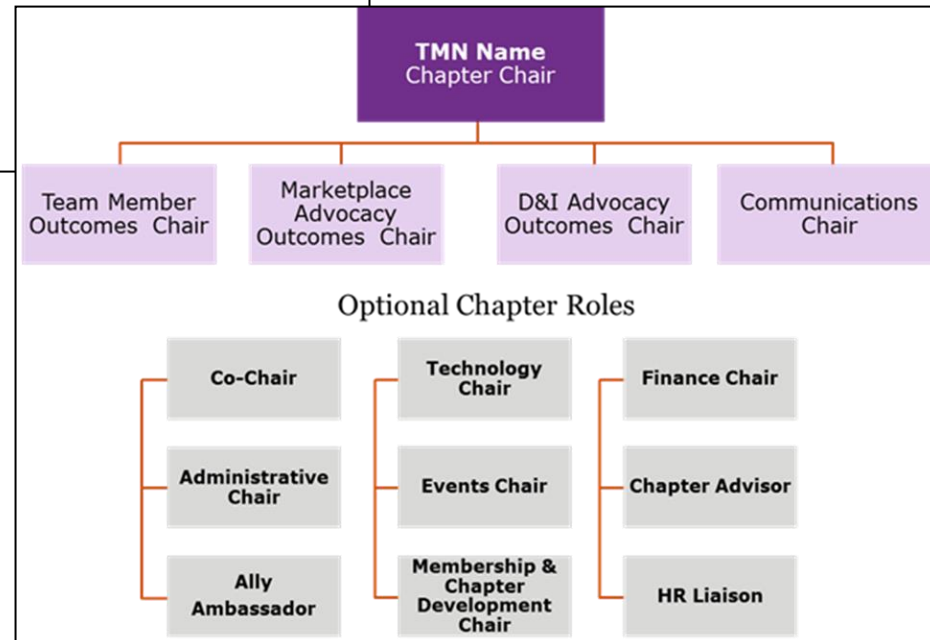
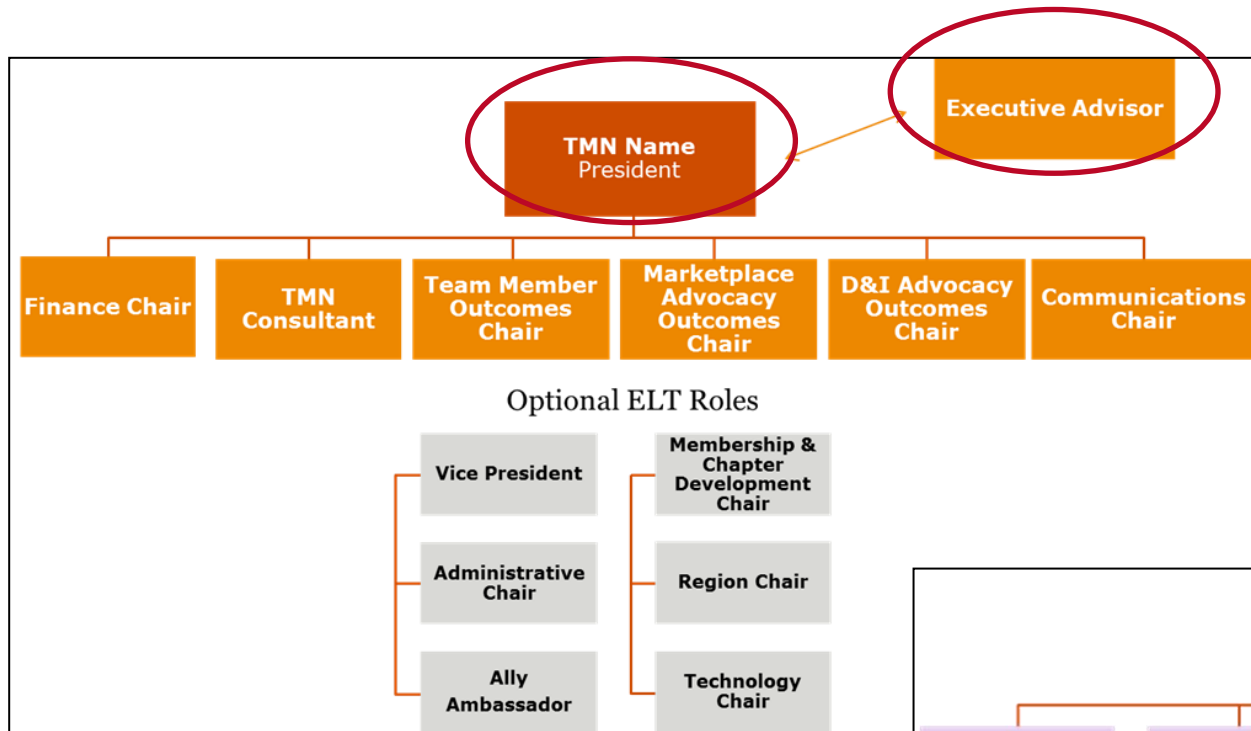
- Determine the 1-2 competencies where you:
  - Have the most passion and/or interest, or
  - Can position yourself for a future role.
- Talk to your manager about your individual competence, what the organization needs from you, and how you can either leverage your strengths more in your current role or explore future roles.



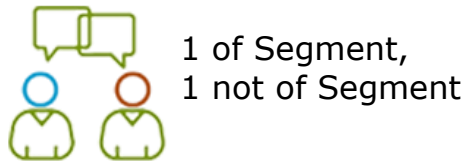
#### Best practice

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.

# Key players to ensure success



# Dual Advisor structure



## 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.



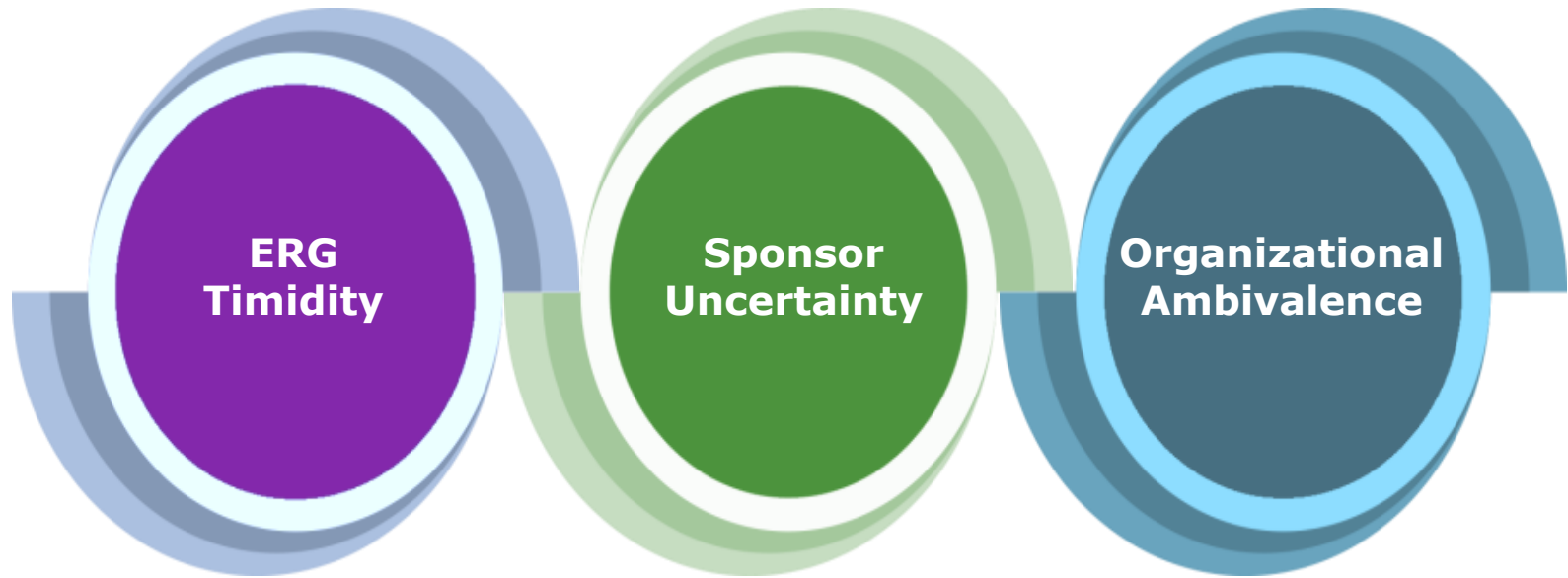
**It is through honest self-reflection and willingness to change that organizations will be able to access the untapped innovation that already lies within.**

**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.



Our experience suggests that Executive Sponsors are the single most under-utilized resource within ERGs



# Lead Like the Business Leader You Are

Run it like a  
business



Utilize the leadership  
skills and business  
competency that got you  
to where 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

# Exploring Five Key Roles



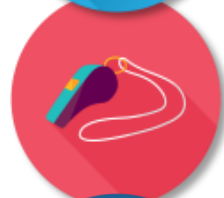
**Strategist**



**Evangelist**



**Innovator**



**Broker**



**Mentor**

# JBC Executive Sponsor Five Key Roles<sup>SM</sup>

## Strategist



- 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<sup>SM</sup>

## Evangelist



- 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<sup>SM</sup>

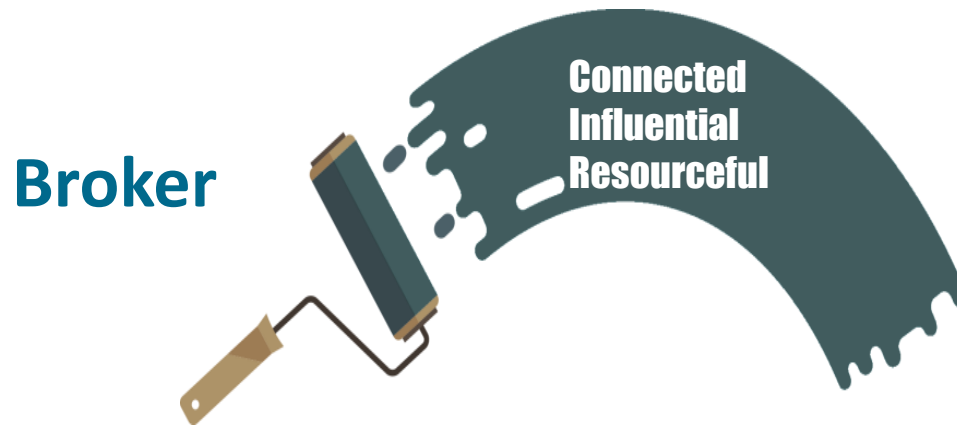
## Innovator



- 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<sup>SM</sup>



- 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<sup>SM</sup>

## Mentor



- 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

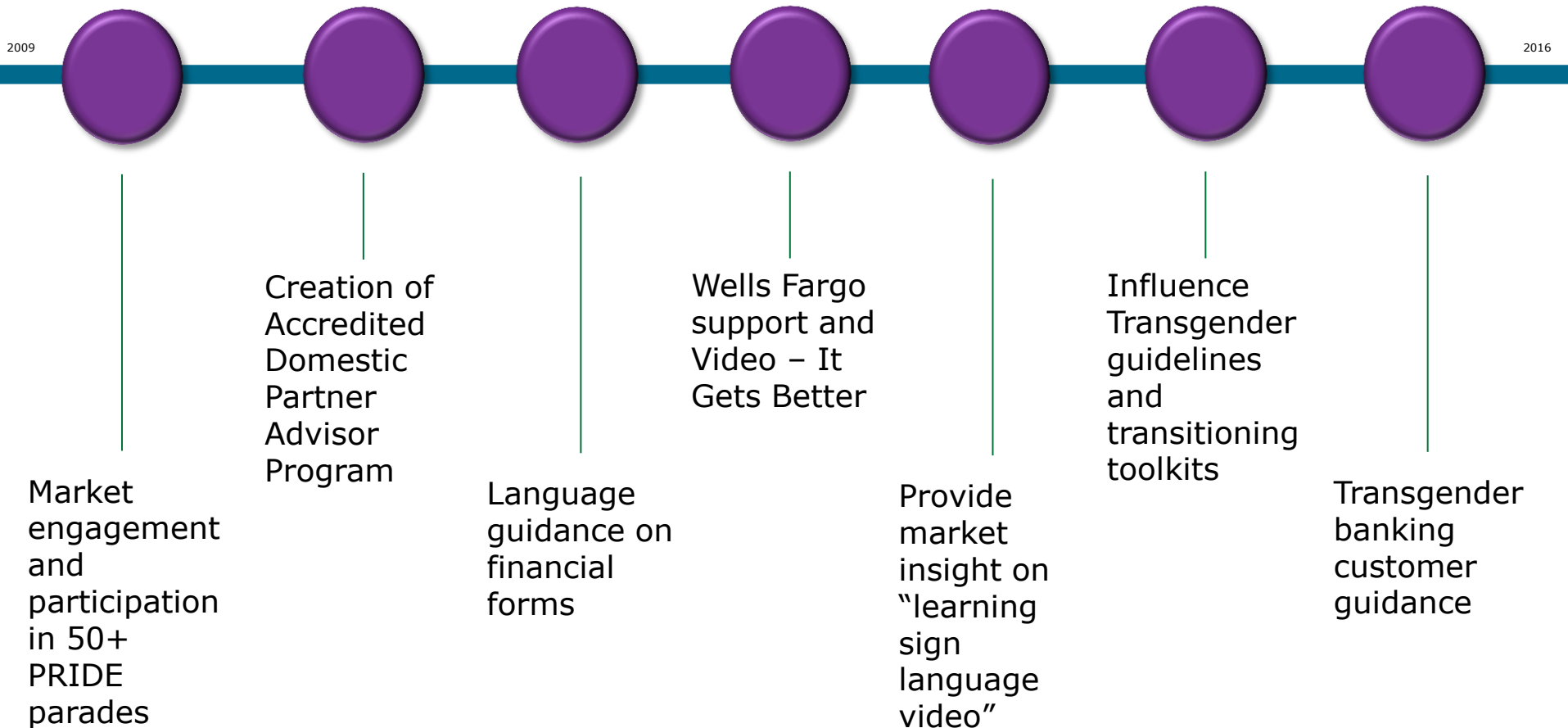


Be one of the first to find out about Jennifer's new book *Inclusion: Diversity, the New Workplace, and the Will to Change* - coming in October!

[www.inclusionthebook.com](http://www.inclusionthebook.com)



# Marketplace impact and value



Questions