



# Sponsorship success toolkit



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#AICPAWomenLead

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Mission: Champions that influence the accounting profession to make diversity and inclusion a priority in the areas of recruitment, certification and advancement of ethnic minorities.

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# Mentor vs. coach vs. sponsor

There is great value in offering a variety of programs to support the development of professionals in your organization. They complement each other and provide their own unique benefits to an individual's development. Let's distinguish between these various support structures.

## Mentor: "Talks to you" (a counselor)

- A mentoring relationship can exist between two people or within a group to further the mentee's career development or to help them navigate the workplace or a particular experience.
- A mentor commonly shares stories with the mentee and provides feedback and advice to help the mentee with career challenges or opportunities.
- Often, the relationship is mutually beneficial and non-evaluative.
- Mentors can be inside or outside of the mentee's organization and could be someone formally assigned within the organization or informally sought out for support.



See our *Share. Learn. Grow. Mentor* toolkit [here](#).

## Coach: "Talks with you" (a thought partner)

- A coaching relationship is designed to unlock the coachee's personal and professional potential in an empowering way.
- A coach partners with a coachee in a thought-provoking and creative process that inspires the coachee to uncover their development goals, dreams and vision for themselves.
- A coach uses listening, reflection, and powerful questions to spark inspiration and put the coachee in charge of their own goals.
- A coach may or may not be a part of the same organization as the person or group being coached.



See our *Creating a Coaching Culture at Your Organization* toolkit [here](#).

## Sponsor: "Talks about you" (a voucher or certifier)

- In a sponsoring relationship, the sponsor has positively evaluated the protégé and intentionally helps the individual gain visibility for particular assignments, promotions or positions, usually in a career or opportunity-related situation.
- A sponsor advocates for the individual they are sponsoring in critical internal conversations, and seeks out opportunities for greater visibility, responsibility and stretch assignments for the protégé.
- A sponsor spends social capital as necessary for the advancement or access to opportunities.
- A sponsor is almost always a part of the protégé's organization, because, by definition, the sponsor uses their organizational influence for the protégé's benefit.

# Why start a sponsorship program?

Sponsorship has many benefits, and some form of sponsorship is most likely already going on in your organization.

While the **advocacy or sponsorship process** occurs informally at many organizations, an ad hoc approach is hardly an effective way to identify and advance high-performing leaders. To build a solid leadership bench and **help your organization benefit from the contributions of the entire talent pool, you may need a formal sponsorship program.**

Among other things, sponsorship is key to creating more equitable leadership in the accounting profession. All leaders have had a sponsor or advocate at some point in their careers. In this toolkit, we explain the benefits and subtleties involved in building a sponsorship program.

Sponsorship can open doors, and more employees need it. Fewer than half of the employees at the manager level or higher serve as sponsors, and only one in three employees say they have a sponsor—and this is equally true for women and men. Moreover, less than a third of employees say they get the sponsorship needed to advance their career.

Companies would be wise to double down on sponsorship. Outside research shows that sponsorship accelerates career advancement, and employees with sponsors are far more likely to say they have opportunities to grow and advance.

**Source:** [McKinsey Women in the Workplace 2020](#)

Having a sponsor — someone ready to deploy relationship capital on your behalf — confers a significant career boost on a protégé, as we've found time and again in our work. For professionals of color, winning a sponsor can have an even more critical impact, particularly when it comes to retention. As companies devote enormous sums to attracting talented women and employees of color, sponsors can ensure that employers make good on their initial recruiting investment.

**Source:** [Coqual, The Sponsor Dividend](#)

## Benefits for protégés

For individuals — or protégés, as this document will refer to those being sponsored — the benefits of a formal program include:

- All leaders have a sponsor in common, someone who has used their **influence at one or more critical moments** in their careers to allow the protégés access to the opportunities they need. The protégé may not think of them as a sponsor, and many are not even aware of their efforts.
- Formal sponsorship programs ensure that all of your organization members — not only those who have made an informal connection with a key leader — have access to higher-level career opportunities and career advancement. It is also necessary for retention and sustainability of a healthy, diverse pipeline.
- **Protégés are given opportunities they may not otherwise receive. An employee without a sponsor may not engage in or have access to the right experiences at the right time.** These disadvantages often affect the career speed and trajectory of an employee who lacks a sponsor.

Unfortunately, implicit bias is often built into informal sponsorship. Without necessarily intending to do so, many people choose to sponsor people who are most like themselves, with the same backgrounds and interests, a phenomenon known as affinity bias that happens informally every day. **Firms with formal sponsorship can avoid this roadblock and create an inclusive environment that enhances morale and staff engagement.**

### Pave your road to a sponsorship!

If your organization doesn't have a formal sponsorship program, consider seeking sponsors in an informal way. This can be easily accomplished by proactively contacting leaders in the organization, sharing your career goals and asking for advice on the best ways to gain exposure to key opportunities, expertise and/or experience within the organization. As you cultivate this relationship, your sponsor should be more and more willing to put social capital on the line.

### Benefits for the organization

The benefits include:

- **Organizations make an intentional effort to identify promising individuals, a critical element in succession planning, and take proactive steps in promoting their advancement.** That includes ensuring they have the right type of stretch assignments and similar opportunities at the right points in their careers.
- **Formal programs can help organizations communicate an important message to their top talent and formally engage them early in the process.** It is a great way to engage high-potential people in a positive and impactful way, and show they are valued and important to the organization. In fact, a total of 70% of men and 68% of women with sponsors felt their careers were progressing at a satisfactory pace, compared to 57% of both men and women without sponsors, according to Sylvia Ann Hewlett's *Forget a Mentor, Find a Sponsor*.
- **Formal sponsorship programs help foster an inclusive culture by ensuring** that leaders are not advocating for only people like them. It allows the organization to leverage from its entire diverse talent pool. Formal sponsorship programs must recognize the challenges their participants face and identify strategies to reduce and, where possible, remove barriers to success. This is essential for all participants, especially for diverse team members who may experience challenges specific to their diversity segments.

Further information on distinguishing among sponsors, coaches and mentors —and much more — can be found in [Forget a Mentor, Find a Sponsor](#), by Sylvia Ann Hewlett.



- **The program helps to diversify the perspectives and experiences of organization leadership.** Not only does affinity bias unintentionally exclude some people, it also robs the organization of the chance to learn from the new ideas and backgrounds that a diverse leadership pool can offer.
- **Formal sponsorship programs also help succession planning by growing team members faster.** When organizations are intentional in providing all team members access to influencers, opportunities and training, team members progress faster in their career track.

“Your organization may not have a formal sponsorship program in place. Don’t let this stop you from being a sponsor! I encourage you to speak up for those who may be unconsciously overlooked, such as women and people of color, so they get the visibility and traction they deserve in their careers. The organization will certainly be better off because of it.”

— **Luke Selvig, CPA**  
Chair of the AICPA Young Members Leadership Committee

# Diversity and sponsorship

We must consider how to sponsor those who are members of a diverse community and what matters most to the protégé. What matters to many is that the sponsor understands the career goals of an individual and who the individual is. It is critical when you decide to be a sponsor that you walk alongside your protégé to the finish line to ensure that they gain access to opportunity with equality and safety in mind.

What does this mean? Individuals in various sectors want to feel included, and this means that the protégé must be recognized for who they are, not who people think they are.

Sponsors must know the organizational climate and culture and whether or not it is the right opportunity for the protégé, not just focusing on the position.

We must ensure that the opportunity and environment are primed to be a win-win for all parties involved. Sponsors may need to provide air cover for stretch assignments, when protégés are acquiring new skills or working with new leaders until the caliber of their work and contributions is realized.

Sponsorship programs are an effective way to overcome network gaps, another systemic and structural issue that further increases inequality. CNBC reported that up to 80% of jobs are secured by networking. Most people leverage their network (“who they know”) to secure even a first-round interview — and diverse candidates usually have smaller, less powerful networks to leverage.

**Source:** [Tackling Diversity and Inclusion: Sponsors, Consultants And Advisors as Part of Your Strategy.](#)

“Sponsorship gave me the confidence to verbalize how I was experiencing the organization differently than others so that we could address those differences. That confidence and the change we made, led me into new roles in diversity, equity and inclusion where I now lead change and make a difference every day for our organization, profession and diverse communities.”

– **Chris Crespo, CPA**

Former Co-Chair of the AICPA LGBTQ+ Initiatives Committee

Sponsors should have an accountability process that requires them to check in with the protégé and the leadership of the protégé. Monitor individual development plans that include removing the barriers on all sides.

Sponsors should actively engage in understanding by asking questions versus making assumptions. Sponsors must intentionally focus on building and strengthening the relationship on trust and candor, with personal accountability for how each person benefits. The relationship can also serve as a culture sharing opportunity for how protégés may be experiencing the organization or team. Sponsors should be interested in gaining an understanding of real or perceived roadblocks so they can work to remove them in the organization.

*[This is to be used by those planning and championing the program.]*

# Key considerations in building your program

Questions to consider:

## What levels are included?

Should sponsorship be available at all levels? Some argue against sponsoring too early since protégés must be experienced enough to benefit from the sponsor's influence and the visibility and experiences that sponsorship can offer them. Your organization should make its decisions based on your people and organization needs.

## Who is selected?

**Sponsors** offer organizational awareness, tips on navigation and access to appropriate opportunities with a deep understanding of proper career timing.

Selection of sponsors should take into account the following:

- They should be influential leaders with great visibility in the organization and a solid network. The protégé's prospects and ultimate success depend at least in part on the sponsor's clout and the ability to put it to work on the protégé's behalf.
- They should be culture carriers of the organization and have a deep commitment to enhancing organization retention and creating an inclusive workplace in which all employees have the chance to reach their goals and potential. This commitment will help ensure the effectiveness of their efforts on the protégé's behalf.
- They should be more senior than their protégé.
- Consider setting specific goals for leaders to name a protégé who is different from them (to fight the affinity bias) and hold the sponsor accountable for reaching this goal.

**Protégés** — Selection criteria for protégés may vary but often include:

- Demonstrated ability and a commitment to excellence and continuous learning

- An interest in advancing in the organization and profession
- Leadership or business development potential; someone who is seen as an informal leader in their area who appears ready to take on greater responsibility.
- A high performing person who could face roadblocks in moving up, which might typically include diverse staff. This might also include staff members who have proven they can excel but who may have a low profile in the organization due to a variety of reasons that sponsorship can address.

## How are matches made?

Protégés may either be assigned to sponsors or participants may express their preferences. In either case, your organization should:

- **Create a diverse committee to oversee the program** — This group can review applications, interview prospective protégés and evaluate matches. It can also determine if the protégé would benefit from mentoring, internal or external coaching, training in business development or certain soft skills — rather than sponsorship.
- **Monitor whether those who may not normally receive sponsorship** are included.
- **Make the right matches** — Sponsors and protégés may not necessarily need to have similar backgrounds or personalities, but they should have the potential to build a trusting relationship. In particular, the sponsor should have the ability and the enthusiasm needed to advocate effectively for the protégé and be committed to making a difference in advancing their career. Remember that representation matters and that there must be alignment between what is said and what is executed.

“Having someone in my corner, putting their own capital on the line to gain opportunities for me to grow and progress professionally, has been one of the most significant factors in creating the career path I want.

“Those who have acted as my sponsor have not only empowered me to bring my best self to every opportunity, they have inspired me to sponsor others with the passion and intention evident in their sponsorship of me!”

– **Lindsay Stevenson, CPA, CGMA**

Chair of the AICPA Women’s Initiatives Executive Committee

### How long will matches last?

In determining the right timing, remember that your program should be goal-driven with specifically identified outcomes. Both parties should agree on what success will look like. The length of the relationship should be driven by the protégé’s goals and the plan developed to achieve them.

Based on the experiences at organizations with successful programs, the sponsor and protégé can make a one- or two-year commitment to the program or the time frame can be indefinite until specific goals are achieved. Organizations may also want to determine and share the expected regular hourly commitment for sponsor/protégé matches, including orientation and training and meetings between sponsors and protégés throughout the year. Your organization may want to begin with a pilot program to determine the optimum duration and time commitment for your program.

### What are sponsor/protégé roles and responsibilities?

Sponsor responsibilities typically include:

- Developing a trusting relationship with the protégé and spending time with them based on the organizations’ time commitment guidelines for sponsors
- Learning the protégé’s long- and short-term goals and discussing the best ways to reach them
- 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 discussing their abilities and potential with other leaders to raise their visibility as well as recommending them for opportunities or promotion
- Actively advocating on the protégé’s behalf during internal meetings when career decisions are being made
- Learn the protégé’s other commitments and obligations outside of work (parent, caregiver, etc.).
- 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.
- Introduce protégés to key players in your professional networks to open up even more opportunities for them.
- Help protégé feel connected. Underrepresented groups find it harder to acclimate and share their personal lives as openly as their colleagues.
- Assess potential, not just qualifications, when identifying a potential protégé. Members of underrepresented groups are often knocked out of consideration by more rock-star potentials with desirable qualifications “on paper.” This biased practice excludes underrepresented groups that have not been given the same opportunities as their colleagues.

Protégé responsibilities can include:

- Identifying short- and long-term career goals and discussing them in honest conversations with the sponsor – this can include learning about possible career paths and opportunities within the organization, from the sponsor or elsewhere.
- Understanding and appreciating the sponsor's role and the investment in the protégé's career that is being made
- Being open to the opportunities that sponsorship may offer and working to make the most of them
- Maintaining a strong working relationship with the sponsor
- Reaching any goals set with the sponsor
- Have honest conversations of commitments and obligations outside of work with sponsor.
- Become involved in committees/groups that put you in front of influential people who can become career advocates.

“Sponsorship is an amazing gift. It must be earned and I am grateful that leaders and colleagues have entrusted me with a small part of their professional capital.”

– **Kimberly Ellison-Taylor, CPA/CITP, CGMA**  
Chair of the AICPA National Commission on Diversity and Inclusion

Sponsorship program accountability:

Those in charge of the sponsorship program should develop guidelines to hold the sponsor accountable to help achieve the goals of their protégé. The sponsor's work should be included in the sponsor's performance evaluation, with discussions of some or all these considerations:

- How the sponsor advocated on behalf of the protégé within the organization
- Specific actions the sponsor took in each of the five attributes of a business leader: business development, technical skills, client relationship, team development and personal traits
- Specific actions the sponsor took to reach any specific goal or opportunity for improvement the protégé identified.
- Specific outcomes or results driven by the sponsorship relationship and their impact on the protégé's career

Your organization should hold the protégé accountable for making the most of the relationship. A protégé's performance evaluation should address whether they:

- Have defined the goal and desired outcome of the sponsorship relationship with their sponsor
- Have acted on the advice and/or recommendations of the sponsor
- Have valued the relationship and focused on specific task completion or related outcome or progress toward goals

### What other steps can the organization take to design a successful program?

- Start with an orientation. Give protégés an introduction to how the program will work, explain the benefits of the program and allow them to ask questions.
- Evaluate the matching to ensure the sponsor is willing to advocate for their protégé and both parties have good chemistry for optimum results.
- Test the matching for unconscious bias and ensure that leaders are not only advocating for people like them (affinity bias).
- Recommend that sponsors and protégés are meeting quarterly at minimum as well as before and after key performance milestones such as mid-year and year-end reviews.
- Embed the success of the protégé in the sponsor's performance evaluation.
- Create transparency of expectations between both sponsors and protégés so all participants are clear on the organizational objectives and intended outcomes.
- Expose senior leaders to high potentials from different groups, especially underrepresented populations. For example, using employee-resource groups to help find potential protégés.
- Track retention rate of those that are sponsored versus those that were not.
- Link sponsorship to senior executives' goals, performance reviews and compensation.

### How do we communicate about the program?

Written guidelines, as well as a shorter set of FAQs, are highly recommended. Organization programs may take different approaches in regards to who is included, how selections are made, the responsibilities and roles involved and how long the program lasts.

However, all communications should discuss how the program benefits the entire organization by enhancing employees' chances to advance and contribute to a successful, inclusive practice.

Communicating regularly to the entire staff about the program's activities and successes can keep it top of mind, reinforce its importance to the organization and inspire the entire talent pool.

Transparency is important to demonstrate fairness. The communications should describe how applications or selections are made and include contact details for more information, as well as expectations for sponsors and protégés.

In addition, communicating regularly to the entire staff about the program's activities and successes can keep it top of mind, reinforce its importance to the organization and inspire the entire talent pool.

### How do we measure success?

Before the program is launched, those in charge of the effort within your organization should determine specific goals for the program, then assess change in those areas, which may include:

- **Retention** – Has the organization done a better job of holding on to top talent since the sponsorship program began? This may include not only people in the program, but also entry-level staff who are excited about the chance to participate in the future.

- **Recruitment** — Has interest in the organization grown since the program began? Do potential recruits seem to be aware of it or excited when they hear about it?
- **A stronger, diverse pipeline** — Has the pool of potential leaders improved since the program began? “Improvement” can be defined in many ways depending on organization needs. Have short- or long-term succession options been enhanced by having more leaders ready to take over? Has the organization been able to strengthen leadership talent in a particular practice area or staff level? Are program protégés getting bonuses for business development or other recognitions of leadership success?
- **Greater inclusion** — Has the organization done a better job of holding on to a diverse staff, such as those from underrepresented groups whose long-term retention numbers have been low in the past?
- **Enhanced engagement** — Does leadership seem more attainable, which can improve staff members’ sense of belonging? Does the staff begin to see leaders who look like them and aspire to take on those roles themselves one day?

### How do we maintain our progress?

In addition to tracking success measures, your organization should review the program at least annually to see what’s working and what isn’t. Use the debriefing questions for sponsors and protégés in this toolkit to gather information about any needed adjustments.

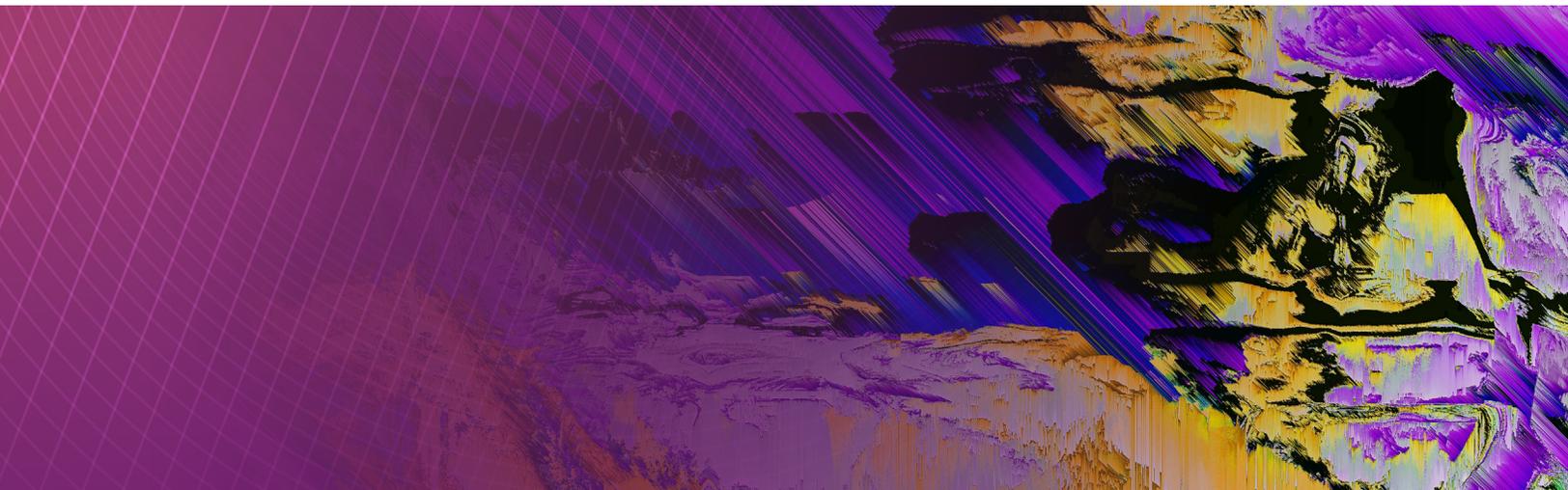


*[Ask protégés to answer these questions to facilitate matching them with the best sponsor.]*

## Protégé questionnaire

Please answer these questions to help us understand your needs and goals and make the best sponsor match for you.

1. What are your short- and long-term professional goals? Please be as specific as possible.
2. Do you feel you are well-positioned to achieve them? If not, why not? What roadblocks might hinder, or have hindered, your advancement? If you are well-positioned, what have been the most important events or people that have set you on a promising career path, and why were they important?
3. What training, responsibilities, experiences or opportunities do you believe you need to advance in your career?
4. What type of advocate do you think would be best for you? What experience or influence should they have, and how could that experience or influence benefit your career?
5. Your sponsor will use their experience and influence to help advance your career and expand your opportunities. What makes you a great potential protégé? Why do you think a sponsor would value working on your behalf?



[Ask sponsors to answer these questions to match them with protégés. Add, delete or modify questions based on your organization needs.]

# Sponsor questionnaire

1. Are you familiar with the organization's' guidelines and expectations for a sponsor's role, including:
  - Developing a relationship that will allow you to understand the protégé's experience and abilities and their aspirations
  - Discussing how they can reach identified goals
  - Identifying training, assignments, promotions and other opportunities that will enhance their career options
  - Talking about the protégé with other organization partners or leaders to raise their visibility
  - Actively advocating for them in meetings when career decisions are being made  Yes  No
2. The organization believes sponsorship will enhance our ability to identify and groom top talent for key leadership roles, goals that will improve our inclusiveness, productivity and profitability. We estimate that sponsors will spend \_\_\_\_\_ [to be determined by each organization] hours per \_\_\_\_\_ [week/month/year] on their sponsorship role. Are you prepared to invest this time in advocating on behalf of your protégé and be held accountable for enhancing their progress?  
\_\_\_\_\_
3. Do you have any reservations or foresee any roadblocks that could prevent you from taking this role?  
Please discuss.



*[Use the protégé self-assessment to get a sense of a potential protégé's strengths, developmental needs and goals.]*

## Protégé self-assessment

I, \_\_\_\_\_ [your name], would like to be considered for the organization's sponsorship program. My current goal is to:

- Take on another leadership role.
- Remain at or near my current level but continue to enhance my abilities and add value to the organization

If you would like to take on a leadership role, how soon do you see that happening?

### Critical leadership attributes: Self-assessment

The organization has identified these critical attributes that are necessary for advancement and success in a leadership role. For each attribute, please rate yourself using the following scale. In addition, describe how you have demonstrated your ability in each area.

1. I'm not currently on track to develop this skill.
2. I'm just beginning to develop this skill.
3. I've made some progress but have more work to do.
4. I've successfully demonstrated competence in this area.
5. I've demonstrated excellence.



*[Use the protégé self-assessment to get a sense of a potential protégé's strengths, developmental needs and goals.]*

## Additional assessment for protégés in CPA firms

**1. Client management.** Rating \_\_\_\_\_

I help manage and develop the business to ensure improved profitability in the short and long term. I manage and develop personal goals in line with firm objectives.

**2. Technical knowledge/firm systems.** Rating \_\_\_\_\_

I have thorough knowledge and understanding of an area of expertise that adds value to clients on a practical level. I can analyze problems and design and implement practical solutions. I have enhanced my knowledge and training and used initiative and creativity to add value to the firm.

**3. Client service.** Rating \_\_\_\_\_

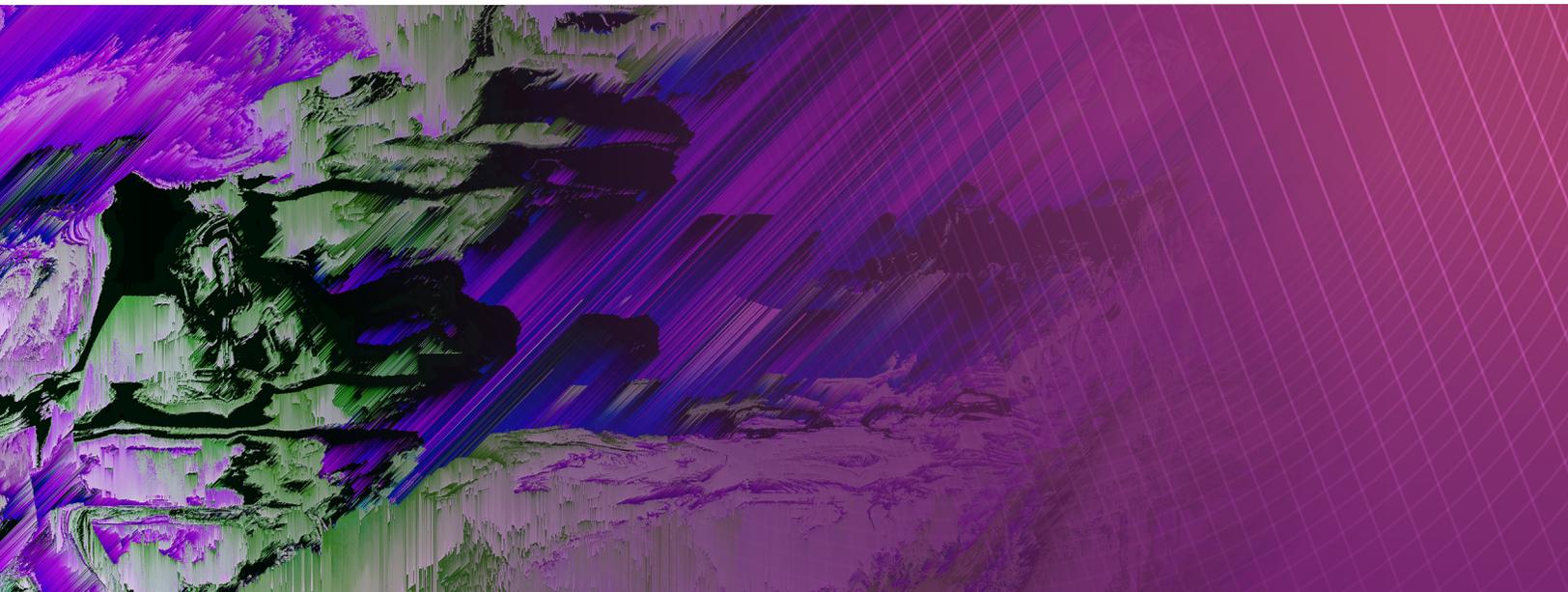
I take responsibility for client relationships. I work proactively to establish and maintain effective relationships and continually seek ways to add value. I manage projects for quality and profitability, maintain my team's excellence and show strong client communication skills.

**4. People development and teamwork.** Rating \_\_\_\_\_

I'm active in team development, sharing knowledge and engaging in ongoing personal career growth as an active mentor. I have the support of my team.

**5. Business development.** Rating \_\_\_\_\_

I identify client needs and opportunities to sell additional services and engage in effective marketing, business development and networking activities to drive sales. I'm involved in the firm's marketing efforts and have brought in new business. I promote the firm in our community.



*[Ask sponsors and protégés to answer these questions at the end of the sponsorship term to gain useful insights for any necessary program improvements.]*

## Sponsorship program sponsor/protégé debriefing

Thank you for your participation in the sponsorship program. Please answer these questions to help us improve the program in the future.

1. Describe what you expected from the program and whether your expectations were met.
2. What would you change about the program? Can you describe any hurdles or disappointments you faced?
3. What were the most important factors in building a successful relationship with your sponsor or protégé? How long did this process take?
4. For protégés: How has the program changed your career at our organization? Have you already achieved important career goals? Which ones? How has the program positioned you to reach other goals?
5. For protégés: Do you feel you were able to take full advantage of the program and the opportunities it offers? If not, what changes to the program would you recommend?
6. For sponsors: Were you able to advocate successfully for your protégé? If not, what stood in your way and what changes would you recommend?
7. Do you have any other suggestions for changes to the program?
8. What advice would you have for future sponsors and protégés?
9. How many times did you meet with your sponsor or protégé? Do you feel this was appropriate to establish your relationship and accomplish your goals?

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