

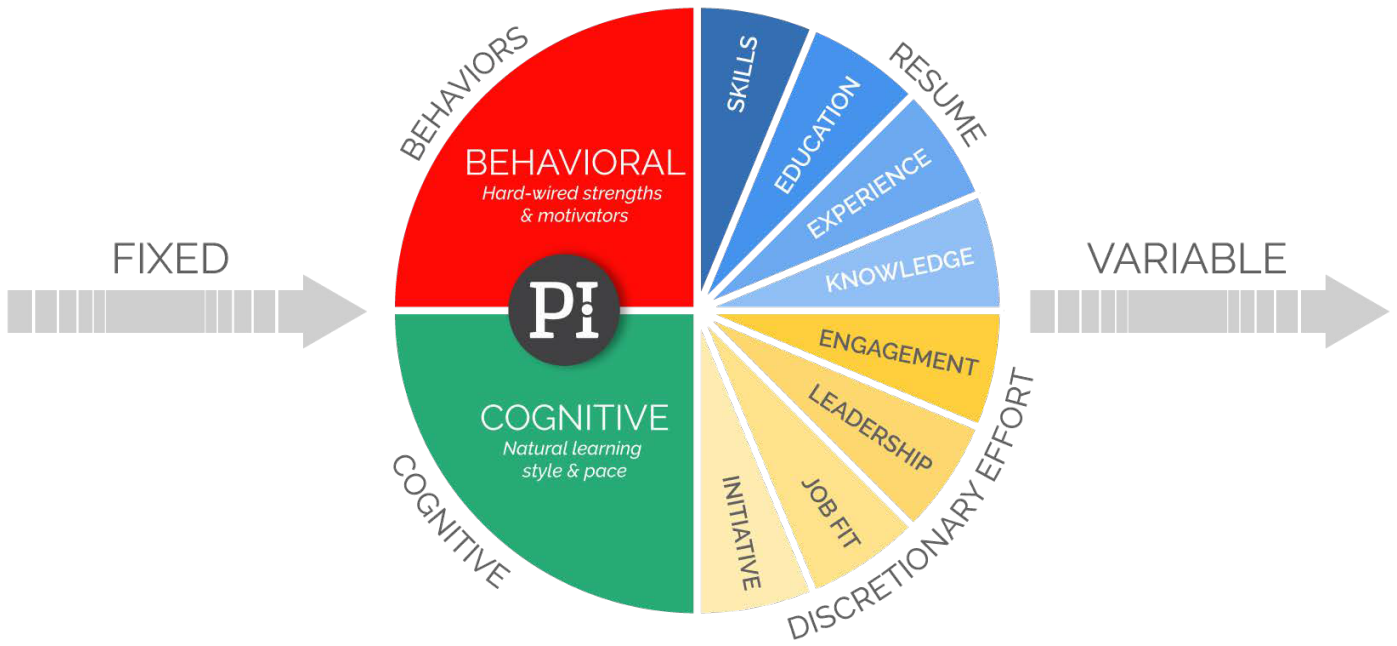
DOMINANCE
EXTRAVERSION
PATIENCE
FORMALITY

Drive Results with Talent

VIRTUAL WORKSHOP

Please use Adobe Reader to write and save your notes in this virtual workbook.

Understanding the Whole Person



The Science Behind PI

Behavioral Assessment



Measures drives and behaviors, or how someone gets work done.

- Developed for business
- Bias-free
- No adverse impact
- Predicts Job performance

PI employs a team of experienced scientists and researchers who develop, maintain, monitor, and document the PI assessments to ensure that they are valid, reliable, and fair. The PI Behavioral Assessment has been in widespread commercial use since 1955, and the validity and reliability of the PI Behavioral Assessment have been investigated by numerous PI researchers and third parties.

The most comprehensive third-party review of the PI Behavioral Assessment was conducted from 2017 to 2018 through the certification company DNV-GL. In that review, the PI Behavioral Assessment was reviewed by two psychologists and independent auditors who evaluated the assessment against the guidelines published by the European Federation of Psychologists' Associations (EFPA, 2013). This audit covered validity, reliability, fairness, development, norms, reporting, supporting documentation and training, and even pricing and distribution. The PI Behavioral Assessment passed this review and was certified under the EFPA model in September 2018. PI continues to maintain this certification through periodic reviews.

-- This page has been left intentionally blank. --

Self-Awareness Study

Tasha Eurich, the author of *Increase Your Self-Awareness*, conducted a 5-year research study with five thousand participants. Her study found that there is a difference between people who think they are self-aware and people who actually are.

_____ % of people **thought** they were self-aware,

_____ % were actually self-aware.

Why Do People Behave as They Do?



What Does the PI Behavioral Assessment™ Measure?

Write in the definition for each of the Factors.

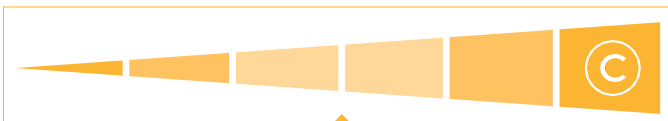
Dominance



Extraversion



Patience

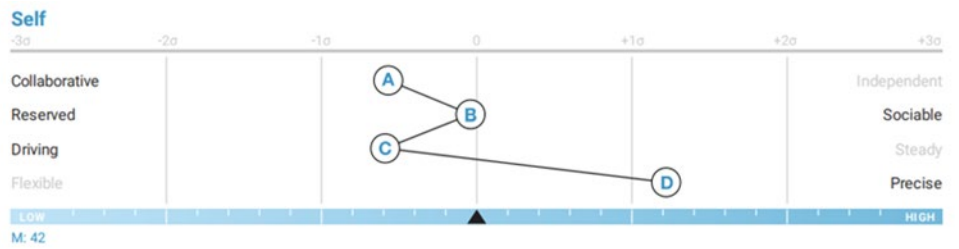


Formality

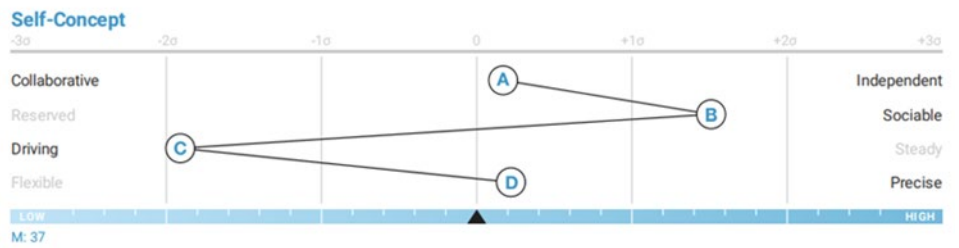


The Whole Pattern: Three Graphs

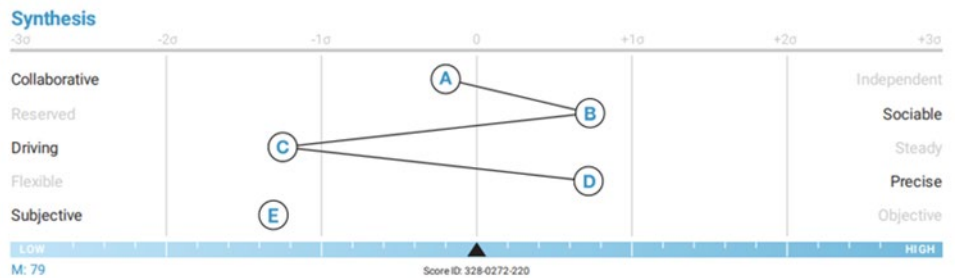
Self:
The REAL ME
 (My natural behaviors)



Self-Concept
I am trying to be...
 (Adjusting behaviors)



Synthesis:
How others see me
 (Combination of Self and Self-Concept)



The Real Me

Self-Concept

Synthesis

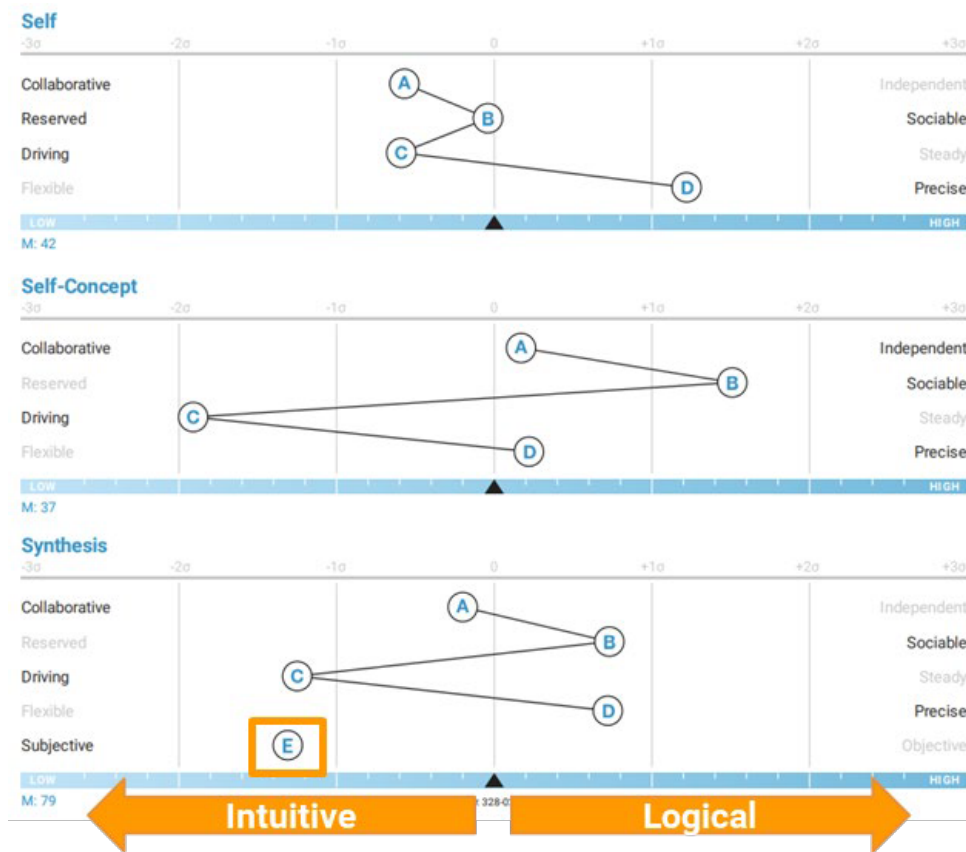
Breakout Session: Get to know your classmates.

You will be put into breakout groups - you'll have the same groups during this course, so don't be shy, get to know each other!

Instructions:

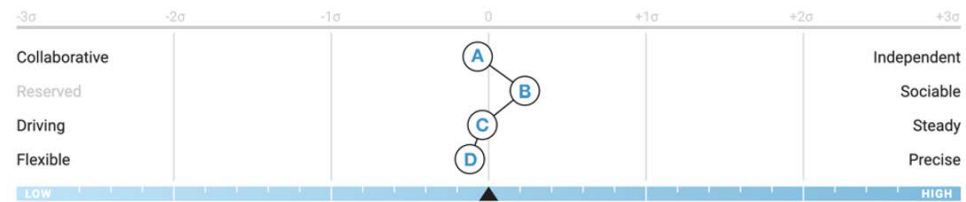
1. Share your Predictive Index Behavioral Graph with your group
2. Discuss what resonates with you most from your results (focusing on the Self graph, your natural hard-wired strengths).
3. Describe the "number one thing" others should know about your behavioral drives.
4. Write down any questions you have about your results (anything you're wondering about or aren't sure of regarding your report).

Factor E

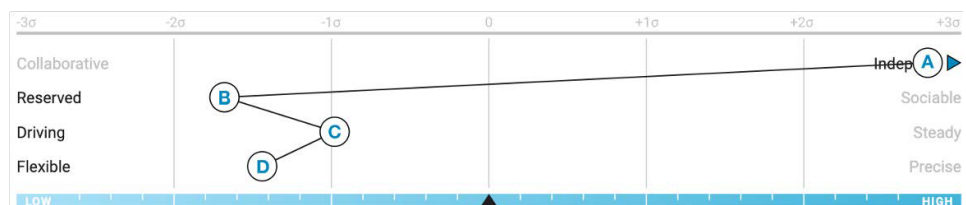


Factor E

Situational Patterns

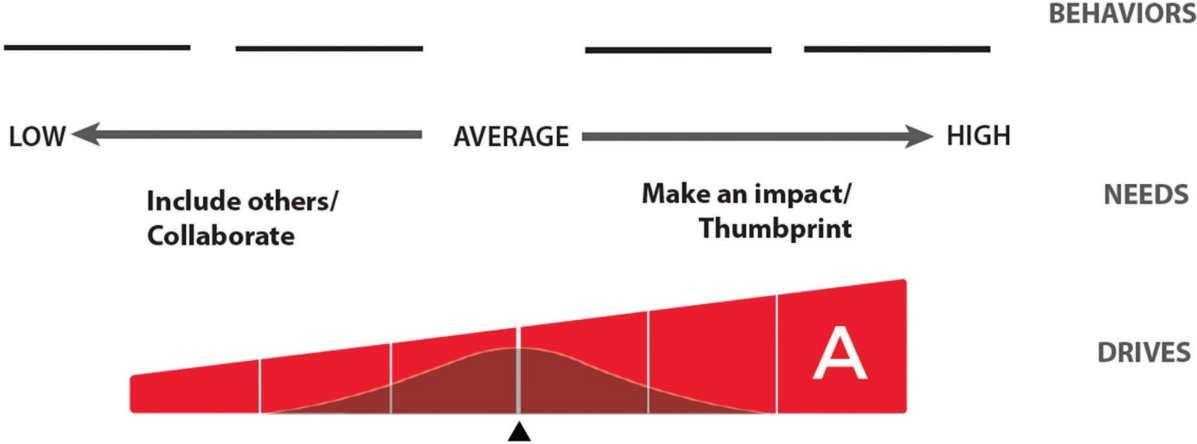


Wide Patterns

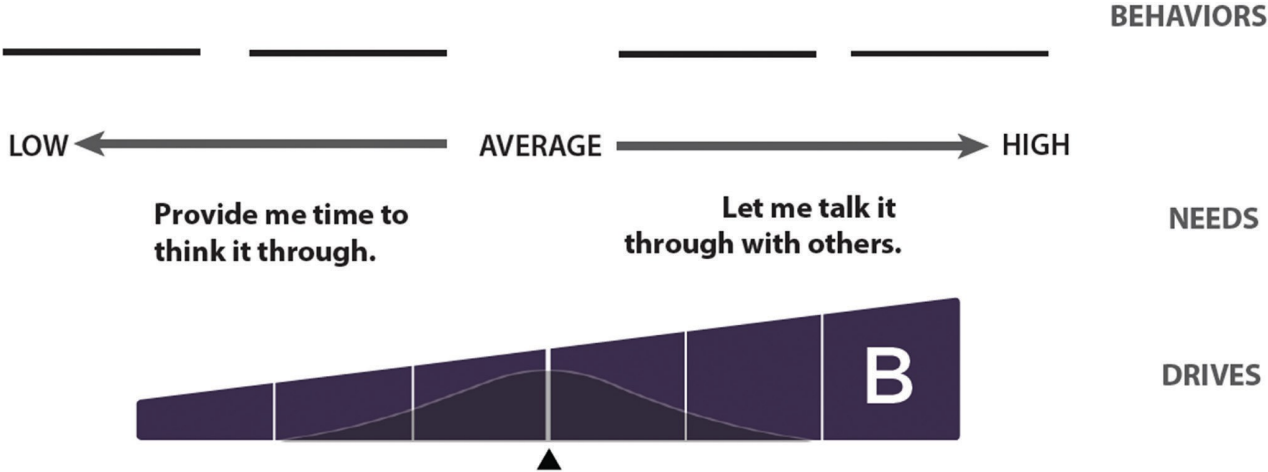


High and Low Factor Behaviors

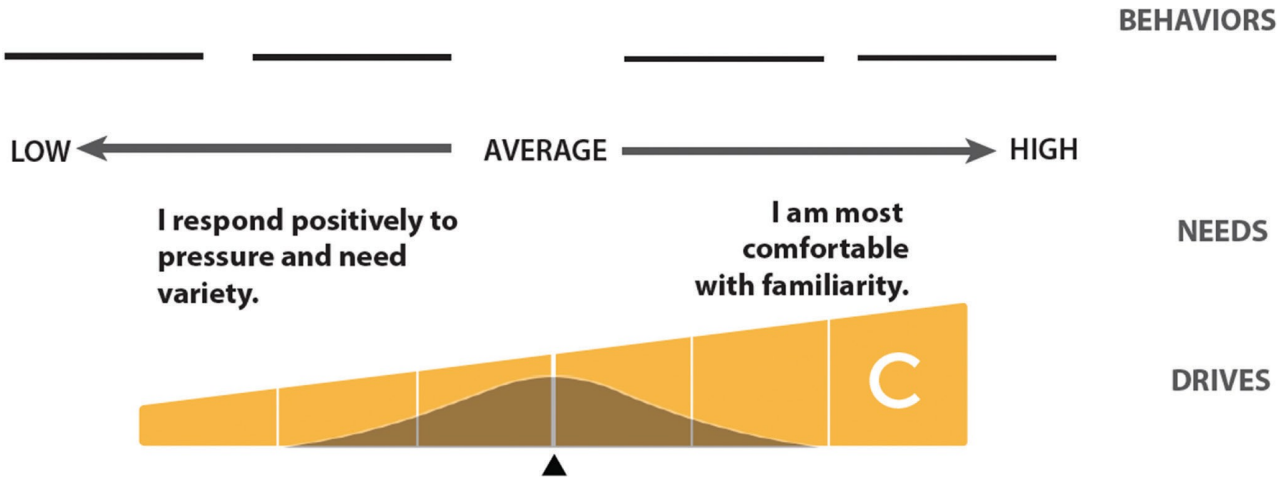
Factor A: Dominance



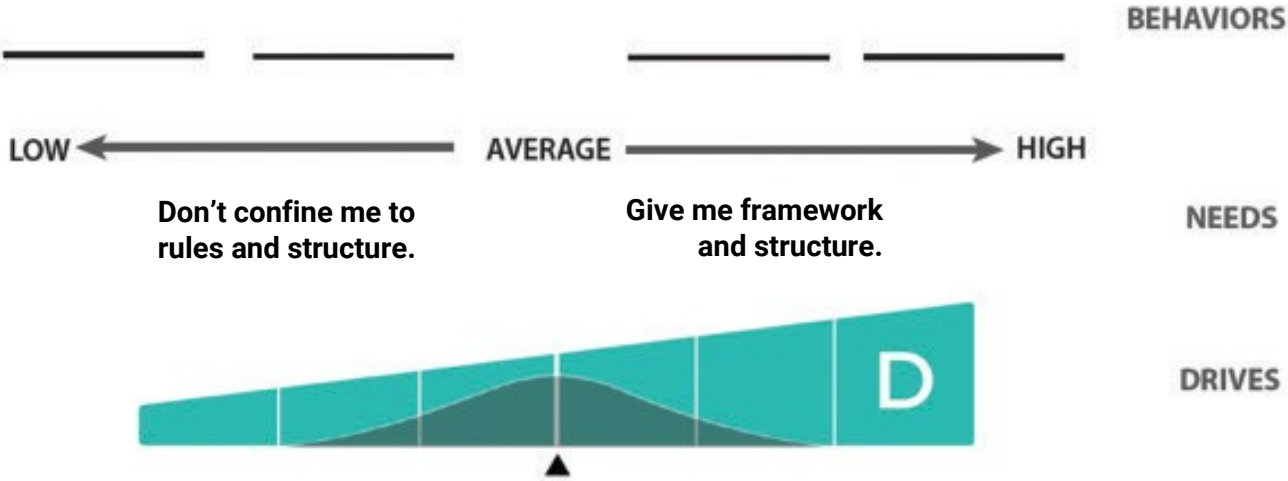
Factor B: Extraversion



Factor C: Patience



Factor D: Formality



Homework Assignment: Job Assessment Survey

For your homework, you will be completing the Predictive Index Job Assessment survey. The goal of a Job Assessment is to create a Job Target, which is a behavioral model or profile for a specific role. Job Targets can be used for hiring, coaching, succession planning, and other areas in your organization.

Instructions:

You will receive an invite to take the Job Assessment in your email. The Assessment should take less than 15 minutes to complete.

1. Review the Job Description below.
2. Fill out the Job Assessment (the invite is in your email) by selecting the behaviors that are frequent and critical to high performance in this role.
3. Avoid kitchen-sinking or pet qualities, and focus on what is required for success in this role, not a "nice-to-have" and not behaviors that are "sometimes" needed.
4. Each trait stands on its own, you may read some that sound similar, but take each at its face value.
5. We will review the input as part of a later session in this course.

Job Description: Inbound Customer Service Rep

This job is at an Internet Service Provider/Communications Company.

- Answer inbound calls (and chats) from existing customers.
- Listening and providing support, answering questions, and finding solutions to a customer's inquiry.

Most calls deal with:

- Account assistance: username, password, account information
- Billing questions/inquiries
- Technical support
- Upset customer who needs help

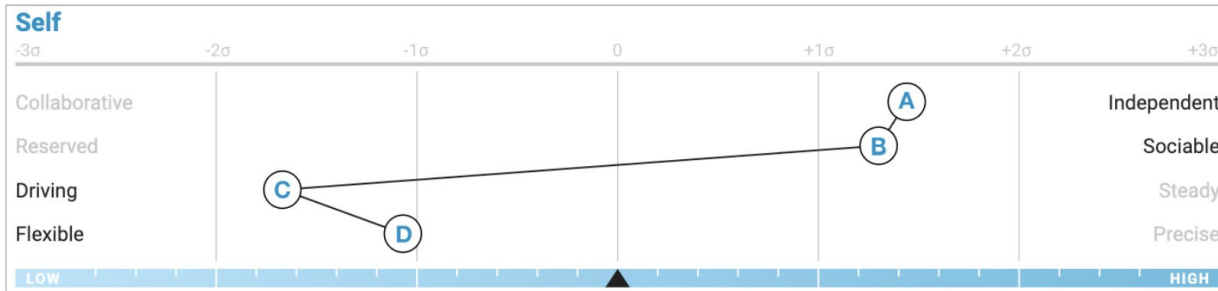
Other considerations:

- There are well-defined parameters/processes/policies to the job and how situations are handled.
- It is critical to listen to customers, have them feel heard, calm them down, and walk them through step-by-step to a solution.
- No up-selling/cross-selling in the role.

Breakout Session

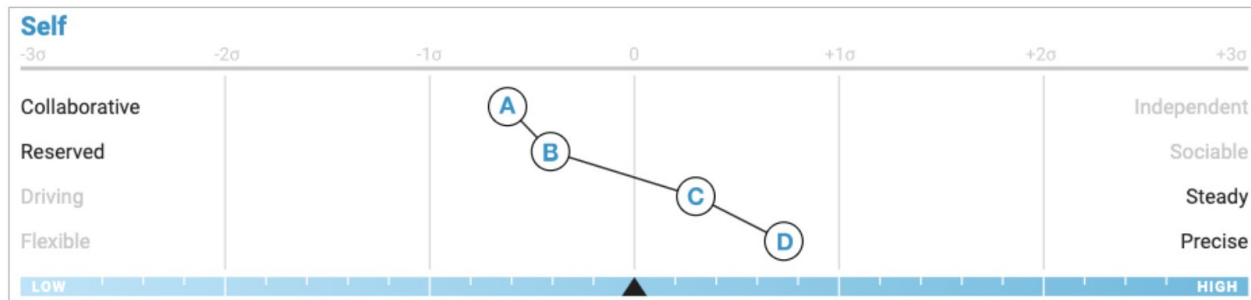
Compare these two people with the following patterns and discuss in your group:

ERNIE:



1. What are Ernie's strongest behaviors?
2. What will Ernie likely be good at/enjoy doing?

BERT:



1. What are Bert's strongest behaviors?
2. What will Bert likely be good at/enjoy doing?

Insights for Coaching, Motivating, Communicating

	Strengths to Focus On	Likes/Dislikes:	Motivated By:	How to Connect:	Challenges:
High A	Confident, competitive, resilient, outcome oriented, decisive, bold, loves a challenge.	Winning/ Losing	Independence, CONTROL , competition, OUTCOMES , individual recognition.	Bottom line, direct to the point. Outcomes, outcomes, outcomes.	They will argue with you. (Everything is a chance to win.)
Low A	Cooperative, harmonious, helpful, accommodating, supportive, unselfish.	Cooperation/ Forceful, Blunt Interactions	Encouragement, reassurance, HARMONY , team environment.	Ask for their help, based on their expertise, attitude. Considerate, supportive, encouraging dialogue.	Will say things are fine, when they aren't. (Especially when feeling confronted, responding to harsh approach.)
High B	Enthusiastic, positive verbal comm, builds strong relationships, persuasive, motivating, coaches, teaches, shares information.	Being Noticed/ Being Ignored	Positive, personal, public praise. INCLUSION, SIGNS OF STATUS, ACCOMPLISHMENT .	Inclusion—share info, ask their opinion. Never criticize in public. Build relationship, recognition for how they do things with people.	Will get defensive, make excuses. (Desire to protect their image.)
Low B	Specific, clear, well thought out communication, analytical, good problem solver.	Privacy/ Small Talk	Recognition for technical accomplishments/expertise, time to think, FREEDOM FROM POLITICS .	Allow time to think, clear, factual communication, freedom from too much small talk, straightforward, analytical approach.	May not say much, engage in discussion, tell you how they are feeling, avoid focusing on the "people part".
High C	Listening, Steady, consistent, dependable, tolerant, persistent, sequential taskmaster, can be deep specialist.	Familiarity/ Unfamiliarity	Paying attention to them. SECURITY, STABILITY , family-like work team, recognition for loyalty.	Scheduled: meetings, conversations, everything. Time to consider and reflect before deciding, lessen pressure, give full attention, be very specific on time frames, deadlines.	May be uncomfortable/resistant to changes in routine, schedule, comfort zone. (Needs time to think, consider, get used to change.)
Low C	Likes pressure, action oriented, high sense of urgency, change-oriented, fine with managing interruptions, multi-tasker.	Action/Not Enough To Do	VARIETY, CHANGE OF PACE , mobility, lots to do.	Brief, bulleted communication about the action/point, immediate feedback, load them up with a variety of challenges, pressure is productive.	Will interrupt, may not listen well, can be tense and frustrated when change isn't fast enough for them.
High D	Accuracy, attention to detail, does things according to process, structure, gets things "right". Follows up and through rigorously.	Perfection/ Mistakes	OPPORTUNITY TO GET THINGS RIGHT , structure, plan, SPECIFIC JOB KNOWLEDGE , freedom from risk, RECOGNITION FOR ACCURACY .	Written, precise expectations. Very specific and frequent feedback with examples; opportunities to develop subject-matter expertise, specialized training.	Very sensitive to criticism (they work hard to make NO mistakes.) Very hard on themselves for anything not done exactly "right".
Low D	Innovative, unconventional, creative, tolerant of risk; focused on big picture, not easily knocked off-center by mistakes, unplanned circumstances, finds a way.	Cross That Bridge When I Get There/ Too Much Structure	FREEDOM FROM STRUCTURE , delegate details, room to decide how, BIG PICTURE FOCUS .	Flexible, informal, casual interactions. Focused on big picture, with strong clarity around "guard rails". Freedom from structure.	Thick skinned, stubborn about their way. May not care very much about your rules, policies, procedures.
Logical	High quality, consistency of decisions; well thought-out logic; data-driven vs. emotional approach, risk mitigation.	Data, Methodical/ Gut Feel, Emotion	Being correct, ensuring the right decision, driven by data.	Logic, data, analysis, facts, evidence of why something will work succeed.	Will slow down or stop when they don't have enough time, data, info to decide.
Intuitive	Speed. Can and will decide, even when they don't have enough time, data, information to know it's correct.	Gut Feel/ All Data & No Gut	Deciding, using emotion, gut, experience and going for it.	Flexibility, use estimates, get 80% of what you need and go, consider their emotions.	Will decide, but sometimes wrong. Emotion can drive rash decisions.

Factor Combinations

Write the definition of each factor combination. We will explore examples and specifics on the next pages.

A:B Orientation: _____

A:C Action: _____

A:D Risk: _____

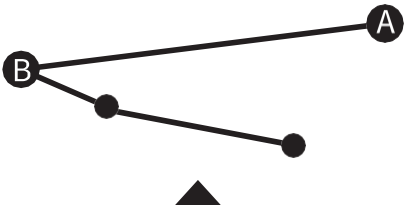
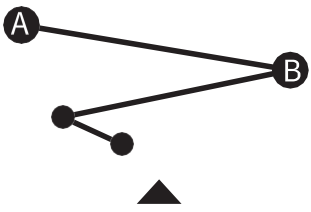
B:C Connection: _____

B:D Interaction: _____

C:D Rules: _____

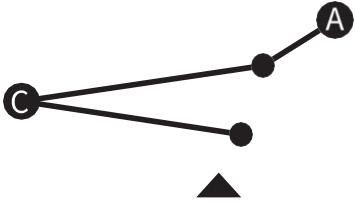
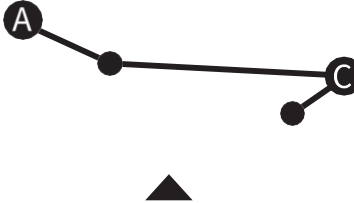
A:B Task or People Oriented

Instructions: Fill in the description provided by the facilitator for each of the attributes of the A:B Factor Combination.

A > B: Task Oriented	B > A: People Oriented
	
Communicating	Communicating
Delegating Authority	Delegating Authority
Problem Solving	Problem Solving
Decision Making	Decision Making
Roles:	Roles:

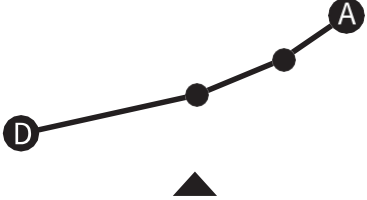
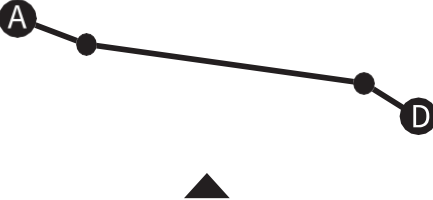
A:C Proactive or Responsive

Instructions: Fill in the description provided by the facilitator for each of the attributes of the A:C Factor Combination.

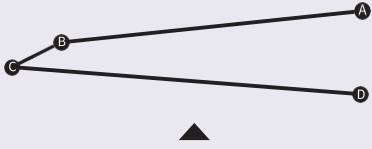
A > C: Proactive	C > A: Responsive
	
Responding to Pressure	Responding to Pressure
Adjusting/Adapting to Change	Adjusting/Adapting to Change
Taking Action	Taking Action
Listening	Listening
Roles:	Roles:

A:D Comfortable or Cautious with Risk

Instructions: Fill in the description provided by the facilitator for each of the attributes of the A:D Factor Combination.

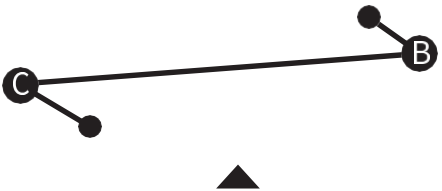
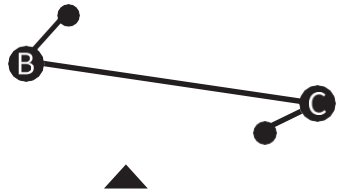
A > D: Comfortable with risk	D > A: Cautious with risk
	
Perception of Risk	Perception of Risk
Decision Making	Decision Making
Need for Rules and Processes	Need for Rules and Processes
Generalist vs. Specialist	Generalist vs. Specialist
Roles:	Roles:

Special A = D Relationship
Example



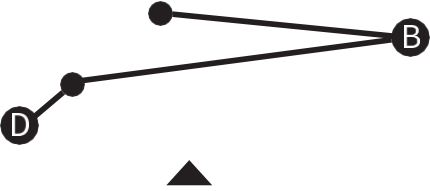
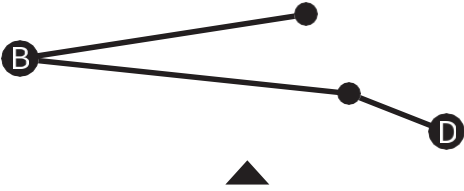
B:C Quick to Connect or Takes Time to Connect

Instructions: Fill in the description provided by the facilitator for each of the attributes of the B:C Factor Combination.

B > C: Quick to Connect	C > B: Takes Time to Connect
	
Connecting with Others	Connecting with Others
Communicating	Communicating
Working in Groups	Working in Groups
Roles:	Roles:

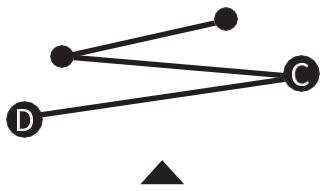
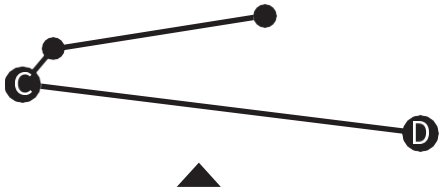
B:D Informal or Formal

Instructions: Fill in the description provided by the facilitator for each of the attributes of the B:D Factor Combination.

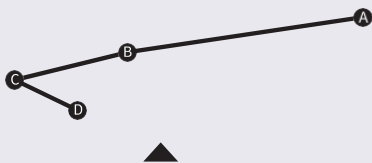
B > D: Informal	D > B: Formal
	
Providing Direction	Providing Direction
Sharing Ideas	Sharing Ideas
Delegating	Delegating
Roles:	Roles:

C:D Casual or Careful with Rules

Instructions: Fill in the description provided by the facilitator for each of the attributes of the C:D Factor Combination.

C > D: Casual with Rules	D > C: Careful with Rules
	
Following or Enforcing Rules	Following or Enforcing Rules
Working with Structure	Working with Structure
Dealing with Deadlines	Dealing with Deadlines
Roles:	Roles:

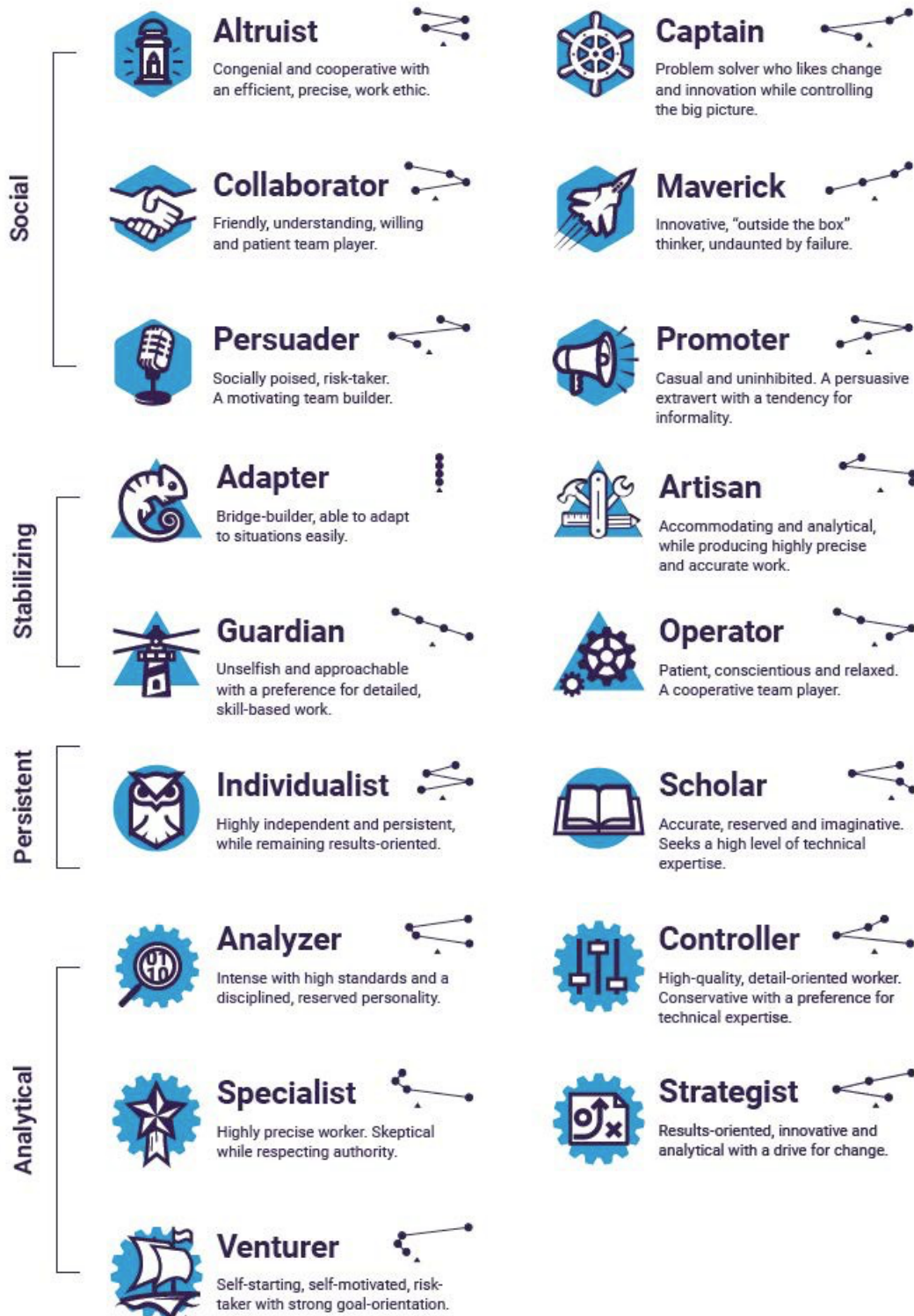
Following or Enforcing Rules



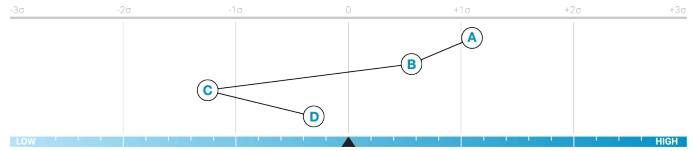
D > C but D stays below the Midpoint.

The 17 Reference Profiles

After a thorough analysis of millions of Behavioral Assessments, the PI Science Team identified 17 "Reference Profiles" that create a behavioral map for different types of people.



EXAMPLE



BA Interpretation Form

Motivating Needs - Use the Summary of Motivating Needs section (page 6) to describe the individual's motivating needs.

Factor	Needs
A	<i>Independence, challenge, understanding the big picture</i>
B	<i>Opportunities to interact, social acceptance, connection, opportunities to influence, public recognition</i>
C	<i>Variety, opportunity to work at fast pace, mobility, freedom from repetition, multiple priorities, change</i>
D	<i>Freedom from structure, flexibility, informality</i>

Behaviors - For each Factor, identify whether the individual is Low, Situational, or High by circling L, S, or H. Use the Continuums of Expression section of the Professional Series Toolkit (pages 8-9) to describe the related behaviors.

Factor	Low – Situational – High	Behaviors
A	(L) (S) (H)	<i>Very assertive, Competitive, Venturesome</i>
B	(L) (S) (H)	<i>Moderately Sociable, Talkative, Open</i>
C	(L) (S) (H)	<i>Very Impatient, Restless, Rapid</i>
D	(L) (S) (H)	<i>Moderately Flexible, Casual, Adaptable</i>

Factor Combinations- List the Factor Combinations for the individual's pattern starting with the widest spread. Identify whether the Factor Combination is both low (L), across the midpoint (A), or both high (H). Use the Factor Combinations section (pages 10-17) to describe the factor combination and behaviors.

Combo	Low – Across – High	Description	Behaviors
A > C	(L) (A) (H)	<i>Proactive</i>	<i>Takes initiative, competitive, driven</i>
A > D	(L) (A) (H)	<i>Comfortable w Risk</i>	<i>Independent, self-confident, decisive</i>
B > C	(L) (A) (H)	<i>Quick to connect</i>	<i>Enthusiastic, lively, persuasive, motivating</i>
A > B	(L) (A) (H)	<i>Task-Oriented</i>	<i>Critical Thinker, problem-solver</i>
B > D	(L) (A) (H)	<i>Informal</i>	<i>Extraverted, outgoing, friendly, enthusiastic</i>
D > C	(L) (A) (H)	<i>Careful with Rules</i>	<i>Corporate Hook- Handles details required, follows up</i>

Self Concept - Describe the 2 biggest changes from Self to Self Concept.

1. *Lower B - Adapting to be more introspective, more independent, more technical-thinking*
2. *Higher C - Adapting to be more patient, more methodical, more consistent*

Name: _____

Date: _____

Interpret Your Behavioral Pattern

Motivating Needs- Use the Summary of Motivating Needs section (page 6) to describe the individual's motivating needs.

Factor	Needs
A	
B	
C	
D	

Behaviors - For each Factor, identify whether the individual is Low, Situational, or High by circling or selecting L, S, or H. Use the Continuums of Expression section of the Professional Series Toolkit (pages 8-9) to describe the related behaviors.

Factor	Low – Situational – High	Behaviors
A	(L) (S) (H) ▲	
B	(L) (S) (H) ▲	
C	(L) (S) (H) ▲	
D	(L) (S) (H) ▲	

Factor Combinations- List the Factor Combinations for the individual's pattern starting with the widest spread. Identify whether the Factor Combination is both low (L), across the midpoint (A), or both high (H). Use the Factor Combinations section (pages 10-17) to describe the factor combination and behaviors.

Combo	Low – Across – High	Description	Behaviors
>	(L) (A) (H) ▲		
>	(L) (A) (H) ▲		
>	(L) (A) (H) ▲		
>	(L) (A) (H) ▲		
>	(L) (A) (H) ▲		
>	(L) (A) (H) ▲		

Self Concept - Describe the 2 biggest changes from Self to Self Concept.

1. _____

2. _____

High Performer (“HP”) Insights

400%



Engaged?



Staying?



#1



#2



How Often?



JOB TARGETS

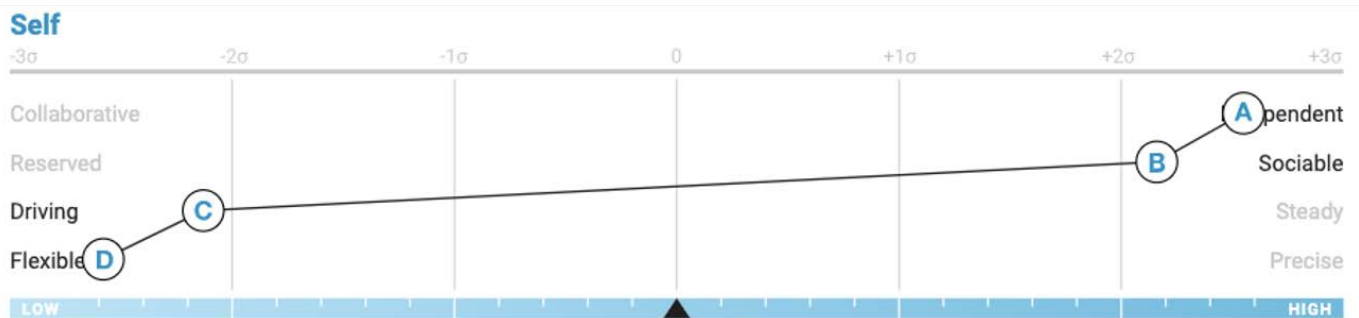
The Predictive Index Job Assessment allows organizations to create a job target as a standard of excellence, defining key behavioral strengths required in a role. T

How might this person feel about their job?

Think about the job description below compared to the individual's behavioral profile. Do their natural strengths align with what is needed in the role?

Medical drug researcher:

This job requires a focused, independent worker who is detail-oriented and follows strict research protocols. This individual must be comfortable with repetitive tasks.



Considering the Job Target below. At a glance, the individual's behavioral profile looks quite opposite from what is defined in the role. How does the individual match up to the factor combinations of the job target? What are the potential results if this individual was a candidate or even an employee?

Medical Researcher Edit

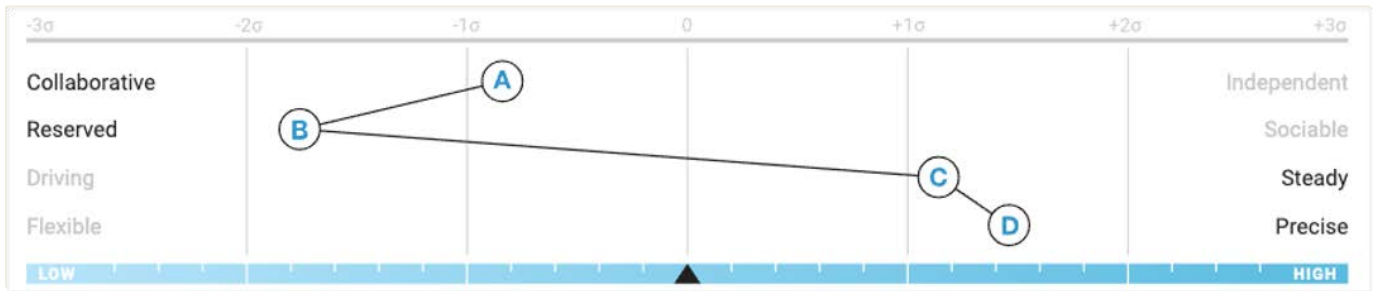
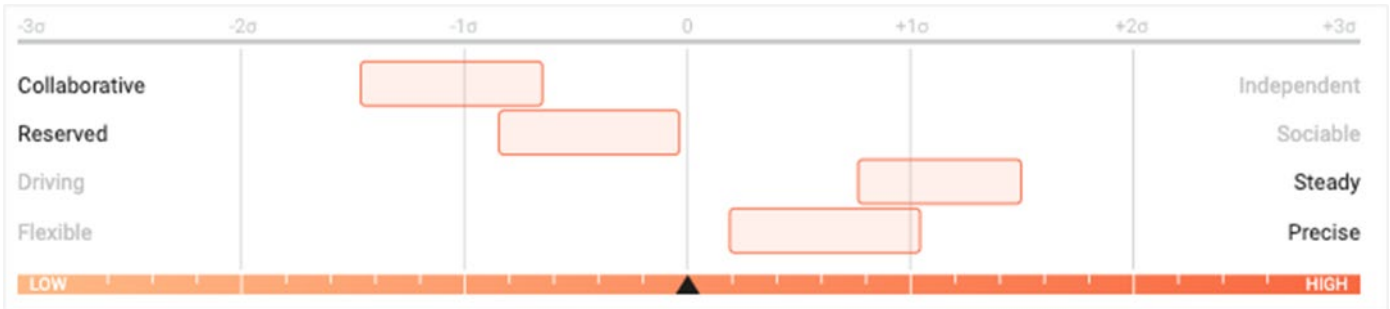
Folder [Invite Candidates to Apply](#) [Copy](#)

Overview Job Report



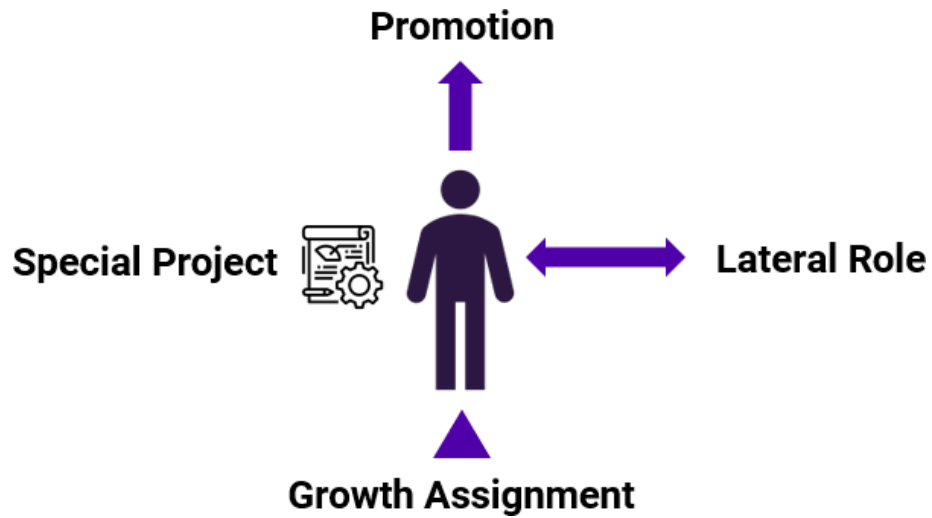
Breakout Session

Evaluating a Behavioral Assessment pattern against a Job Target.



1. What are the Factor Combos of the job:
2. What are the person's Factor Combos?
3. What areas will this person do well?
4. What areas will the person need to adjust?

Not just for External Candidates



PI Job Assessment

A 10-minute tool that measures:

Behavioral

90 items

Behaviors that are important and frequent

Identify Stakeholders

A stakeholder is knowledgeable about the most important and frequent job activities.

Who could serve as stakeholders?

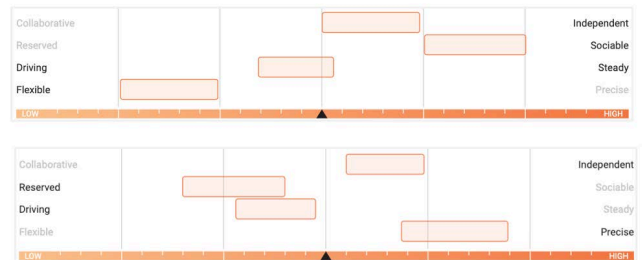


Effective vs. Ineffective Job Targets

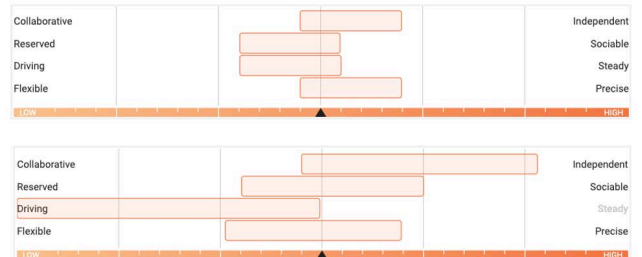
Effective Job Target

- Is Wide Enough (not too close to the midpoint)
- Distinguishes Factor Combos
- Identifies a Key Factor or two
- Ranges should be reasonable length
- Avoids "Everyone gets a blue ribbon"

Effective:



Ineffective:



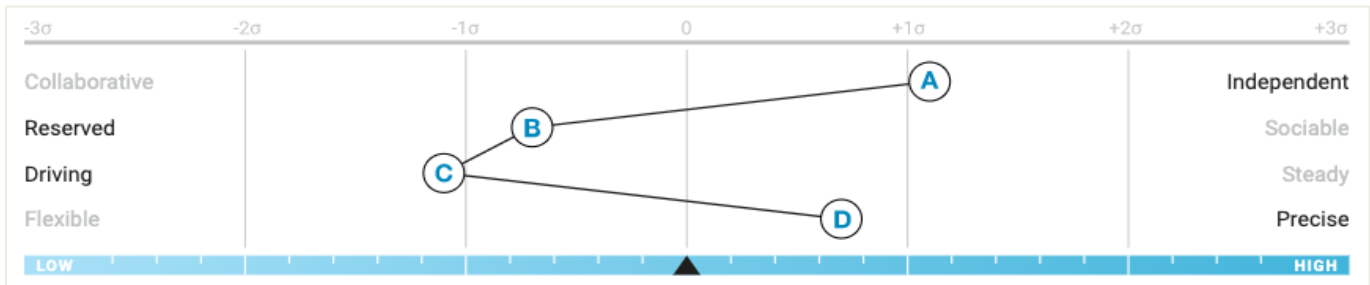
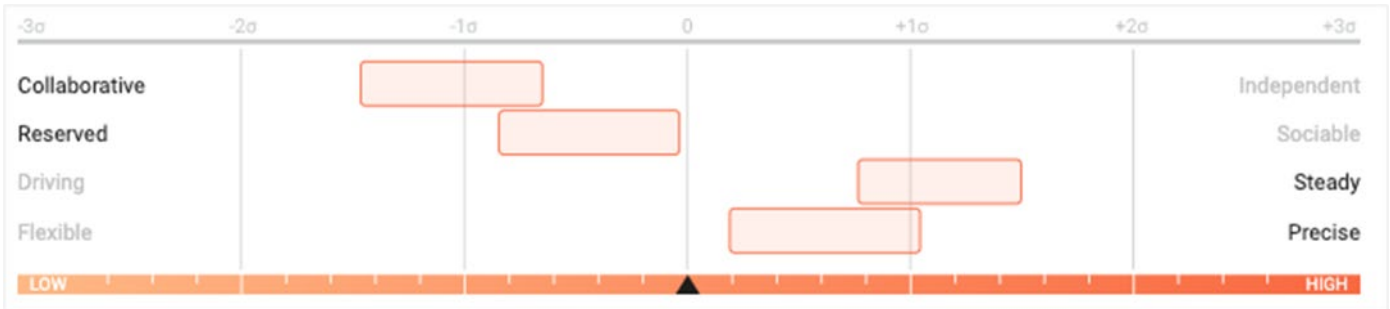
Job Target Best Practices

1. Give yourself **credit** for using workforce analytics:
 - Playing to strengths, setting people up for success, getting to understand people's unique strengths and motivations.
2. Administer Early and Always:
 - See past the imperfect resume and widen your funnel of qualified candidates.
 - See past the seemingly perfect resume and screen out reds and the “wrong” yellows.
 - Save yourself **significant** phone screen (and other time).
3. Hiring Manager Value Proposition
 - “You may see fewer candidates, but the candidates I do send you will be well qualified for your job on the things you can’t fix or change.”
 - Allows you to focus the hiring manager on the things they are actually good at interviewing for.
4. Track the hires
 - Red/Yellow/Green vs. actual performance on the job.

Looking back at larger groups of incumbents can help a TON in getting this data.

Breakout Session

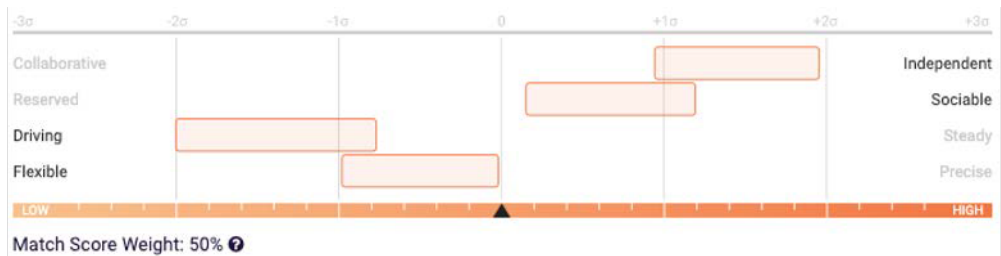
Evaluating a Behavioral Assessment pattern against a Job Target.



1. What are the Factor Combos of the job:
2. What are the person's Factor Combos?
3. What areas will this person do well?
4. What areas will the person need to adjust?

Match Score

The PI Software let's you view candidates or employees directly against the Job Target and compares the Behavioral of the person (where their factors match up to the ranges of the Job Target created), providing a 1-10 rating as a Match Score.



Name	Overall	Behavioral Assessment: Status	Behavioral Match	Ref Profile
Rodriguez, Fernando	10		10	Persuader
Peters, Tom	8.5		7	Persuader
Clopp, Jamison	8.5		10	Captain
Csok, Fred	7.5		8	Adapter
Roberts, Mona	7		7	Altruist
Vaughn, Gabbie	5.5		6	Promoter
Fry, James	5		1	Craftsman
Hernandez, Marcus	3		2	Guardian

Green Yellow Red

The 1-10 scoring also gives you a color-coded rank of Green, Yellow, and Red.

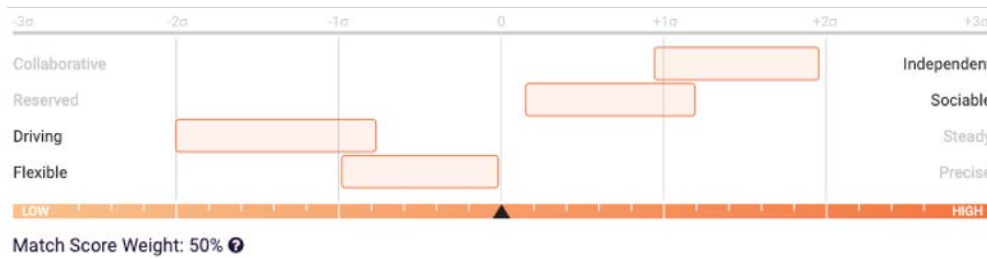
Green:

Yellow:

Red:

Breakout Session

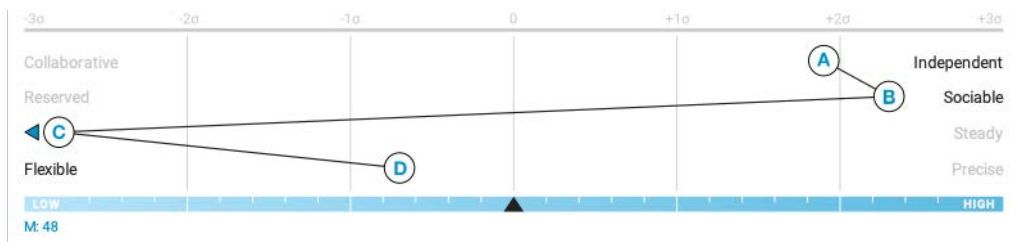
Evaluating a Behavioral Assessment pattern against a Job Target.



What are the Factor Combos of the Job, in rank order?

What are the highest and lowest factor of the job?

Tom P.

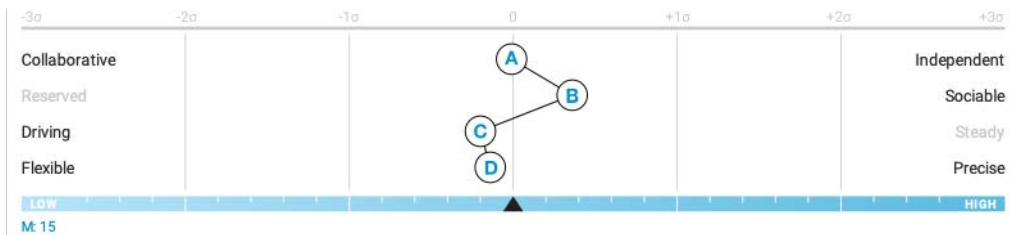


What are Tom's Factor combos? Do they match what's needed for the job? Where can he adjust?

What is Tom's highest and lowest Factor? Do they match what's needed for the job?

What would Tom do well? Where would he have to adjust?

Fred C.

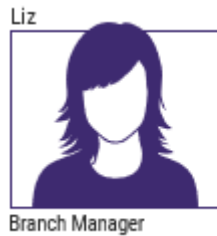


What are Fred's Factor combos? Do they match what's needed for the job? Where can he adjust?

What is Fred's highest and lowest Factor? Do they match what's needed for the job?

What would Fred do well? Where would he have to adjust?

CASE STUDY • Part 1



The Meeting

John is relatively new in his role as a teller, having been with Oshkosh Bank for just 3 months. It is also John's first position out of college. During a scheduled meeting with Liz, his manager, John is surprised to hear that Liz has concerns about his interactions with customers. Liz explains rather directly that John's technical skills are fine; however, his "people" skills are lacking, and he will need to improve the way that he engages customers.

John is a little put off by her comments but manages to gather himself and asks Liz for examples of when he did not engage customers properly. Liz is in a hurry and views John's request as being defensive. She responds by telling John that she does not have time now to go into specifics but just needs John to pay attention to his soft skills and engage his customers in a friendlier manner.

Liz leaves convinced that John gets the point and is certain that he will shape up. Problem solved! John leaves the meeting feeling dejected and unsure of exactly what he needs to improve. Moreover, he felt he was providing superior customer service to clients and is hurt by her comments. John thinks, "Maybe this isn't the right place for me."

Case Questions

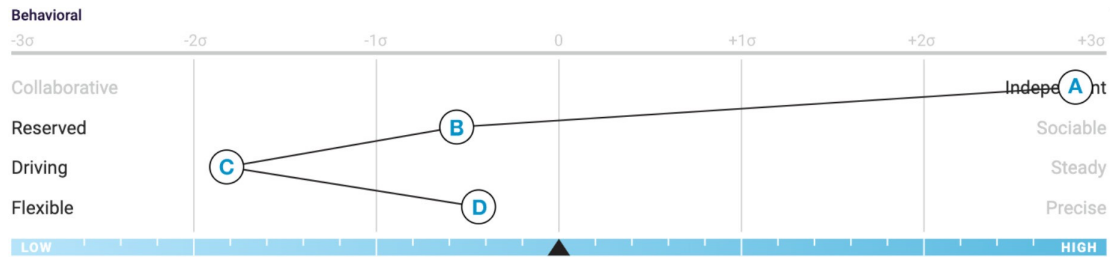
What is at stake?

Who (or what) was right? Who (or what) was wrong?

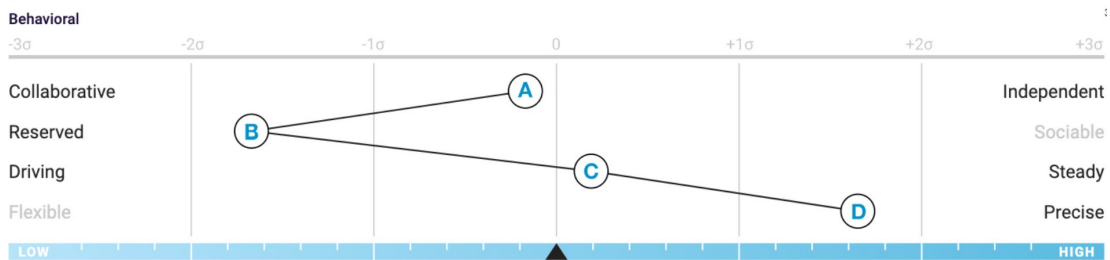
Other Thoughts and Observations:

CASE STUDY • Part 2

Liz, Branch Manager



John, Bank Teller



What is Liz's strongest Factor (furthest from the midpoint)?

What is John's strongest Factor?

Based on his behavioral pattern, what does John need in order to be productive?

What adjustments could you recommend to Liz to help her future interactions achieve a more positive outcome?

Tools: Coaching Guide

Identify areas of alignment and misalignment between the employee's behavioral drives and those of the Job Target. Use the coaching questions to focus on one or two areas for the employee to work on improving.

Coaching Guide

A guide consisting of a set of behavioral coaching questions generated by comparing an Individual's PI Behavioral Pattern and a Position's Job Pattern.

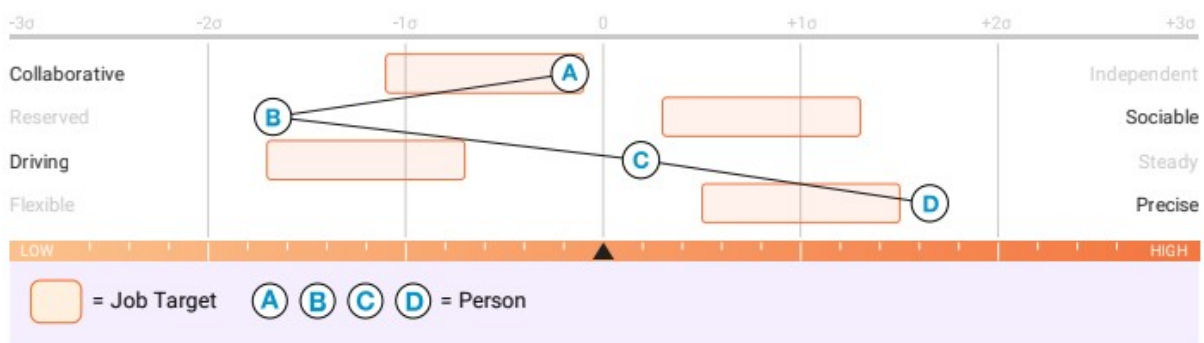


John Bank Teller



Bank Teller

Behavioral Comparison - Person and Job



Coaching Questions

- A Dominance**

How could you build upon your natural ability to get along with others?

What would it look like if you were to increase the service you're currently providing to an even higher level?

Describe how you are able to build team performance with a variety of people on the team?
- B Extraversion**

What could you do to better recognize and understand the viewpoints of others?

What needs to happen for you to be more vocal with your point of view?

How could you demonstrate a greater ability to communicate persuasively with others?
- C Patience**

How do you respond to a fast paced work environment with multiple priorities?

What could you do to increase your comfort level when you need to adjust and act quickly?

How can you utilize your ability to work at a steady pace when work demands increase?
- D Formality**

How could you become more open to new ideas rather than the established ways of doing things?

What needs to occur for you to delegate details to others more readily?

What is the best way for you to be more comfortable in uncertain situations?

Tools: Management Strategy Guide

Identify strategies to manage others the way they would like to be managed. Obtain insights into an employee's motivating needs and preferred styles to help unlock their potential.

With this tool, the manager should read the report first and rate or score themselves - how often or well is the manager currently employing the strategies provided?

Next, the manager should have a meeting with their employee to receive feedback. Does the employee agree or disagree with the manager's self-rating. The employee should also identify the one or two strategies that they feel would make a key difference.


Finally, the manager and employee should create a reasonable action plan together and set up a time in the future to review the status of the Management Strategy Guide again.

PI INSIGHTS Management Strategy Guide PI THE PREDICTIVE INDEX

2020 April 21

JOHN ABBEY

People are complex. You should motivate and direct others based on their behavioral preferences. The following tips outline how your employee likes to be managed. **How are you doing?**

 **John is a Scholar.**

A Scholar is accurate, reserved, imaginative and seeks a high level of technical expertise.

Strategies based on how John interacts in the workplace:

- Provide opportunities to broaden their technical knowledge
- Recognize the tangible results they obtain (rather than "soft" achievements)
- Give them opportunities to figure things out alone
- Solicit their input and feedback, particularly when solving problems

Strategies based on how John takes action:

- Give them the opportunity to adjust their pace of work as necessary
- Provide them with constructive criticism when I have to correct or change their work
- Take time to listen to their point of view and acknowledge their input
- Provide them with a supportive work environment to act on their ideas

Strategies based on how John deals with the risk and decision making:

- Provide them with the independence to have control over results and outcomes
- Make myself or another expert available when the person is making a decision outside of their area of expertise or when structure is unclear
- Engage them privately when critique is needed
- Provide clear parameters or a framework of new initiatives, allowing for their personal insight

Tools: Management Strategy Guide

Identify strategies to manage others the way they would like to be managed. Obtain insights into an employee's motivating needs and preferred styles to help unlock their potential.

With this tool, the manager should read the report first and rate or score themselves - how often or well is the manager currently employing the strategies provided?

Next, the manager should have a meeting with their employee to receive feedback. Does the employee agree or disagree with the manager's self-rating. The employee should also identify the one or two strategies that they feel would make a key difference.

Finally, the manager and employee should create a reasonable action plan together and set up a time in the future to review the status of the Management Strategy Guide again.

PI INSIGHTS

Management Strategy Guide

2022 September 06



JOHN ABBEY

You have now considered how well you customize your management style for John. We recommend you complete an action plan.

Step 1: Reflect

What have you done well?

What can you do better?

Step 2: Develop action plan

What specific actions will I take in the next 90 days to enhance the way I work with John?

For example: I will take Emily (high Extraversion) to lunch once a month to establish a more personal connection.

Step 3: Determine blockers

Based on my own behavioral drives and needs, what might prevent me from carrying out my action plan?

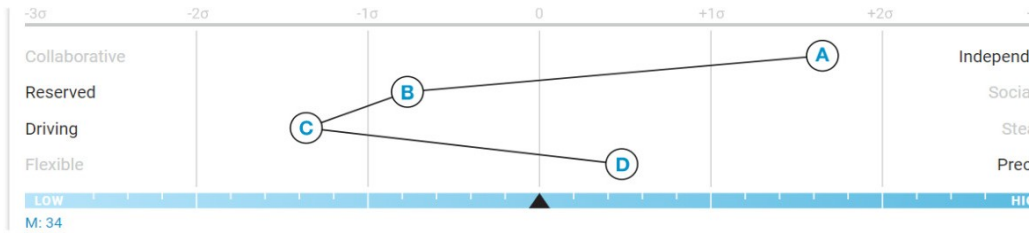
What will I do about it?

Step 4: Hold yourself accountable

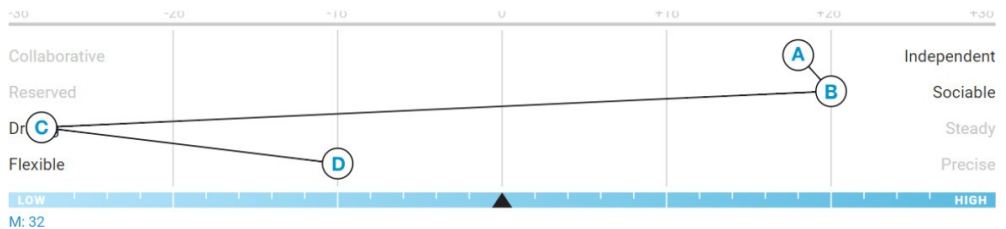
Set a date to re-evaluate your progress with John.

Breakout Activity: Relationship Activity

Employee A



Employee B



These two individuals are having trouble getting along. You have been asked to mediate a conversation with them to share your insight now that you “speak PI.”

1. How would you manage Employee A?
2. How would you manage Employee B?
3. Which factor combinations do they have in common? Which factor combinations are different?
4. What do you think are the likely sources of friction between the two employees and how would you mediate?

Relationship Guide

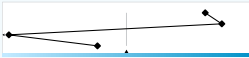
The PI Relationship Guide compares two individuals, their strengths, cautions with areas of potential conflict, and tips on how to improve communication and increase

Relationship Guide

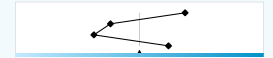
Compare two people to discover how they work together.



David O'Brien
Persuader



Gail Paul
Analyzer



Relationship Strengths

David and Gail are efficient, purposeful, and somewhat assertive when communicating with each other.

David is eager to start conversations and will typically be the communication initiator with Gail.

David and Gail take a transactive approach to communication, quickly getting to the point, and moving on to the next topic. David can discuss broad ideas, but Gail is good at translating David's suggestions into specifics.

Relationship Cautions

David and Gail may work hard to persuade each other, but may not listen closely to each other when there is disagreement.

Gail may be overwhelmed by David's eagerness to have a conversation, and Gail may politely seek to shorten or avoid interactions with David.

David and Gail may have difficulty moving a conversation forward constructively when they do not agree with each other or when they are both indecisive.

Gail may feel like David communicates without getting to the point, whereas David may feel like Gail is too focused on the details.

Relationship Tips

David and Gail should consciously acknowledge that each person has perspectives and information that could be beneficial to the other.

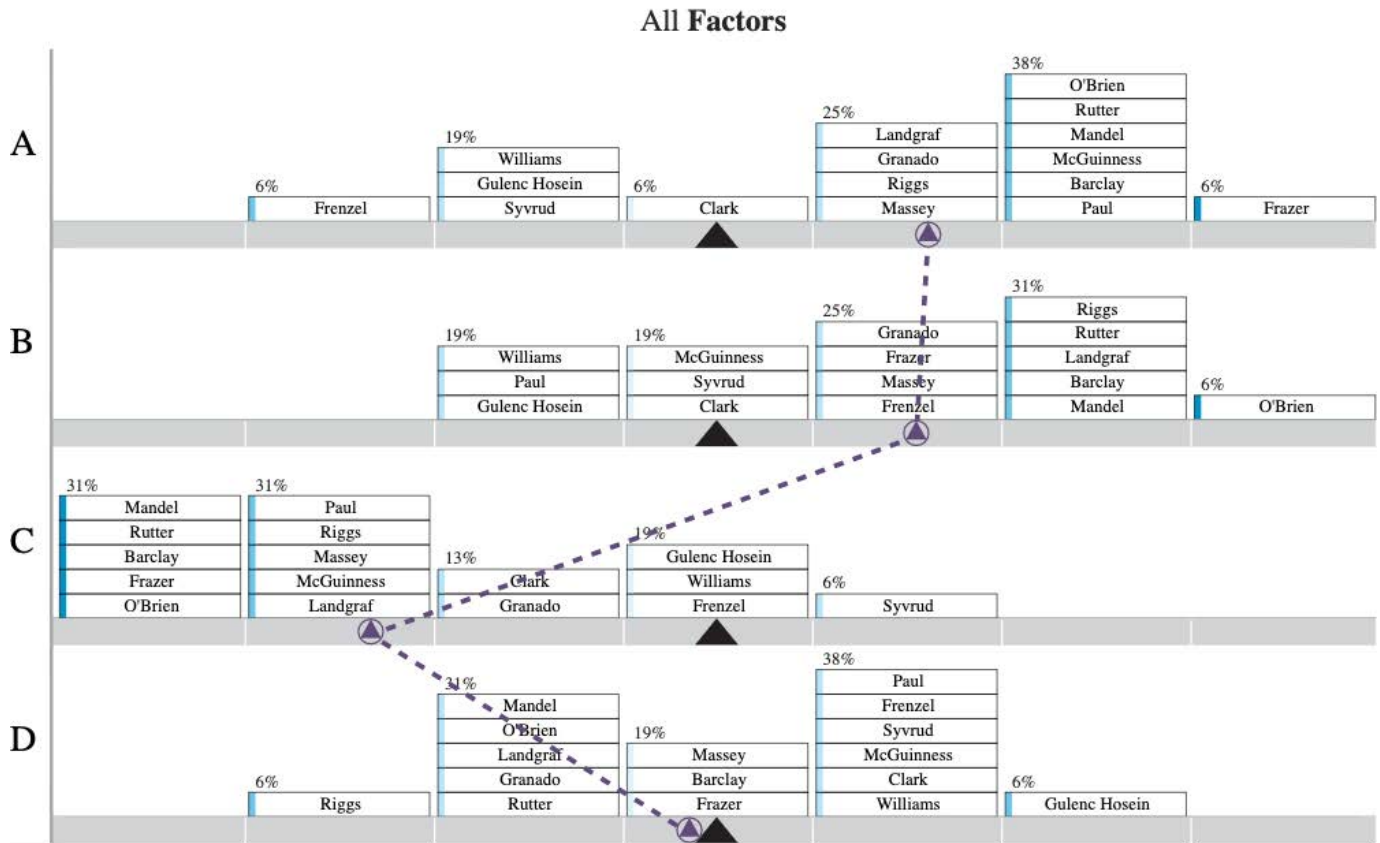
David should set up a time to speak with Gail rather than dropping by and asking Gail questions spur of the moment, but Gail should also make the effort to ask David for feedback or opinions.

David and Gail should be sure not to talk past each other, and they should try to self-regulate to make sure the other person understands what they are trying to say.

Gail should make sure that David is clear on specific action items and next steps when they end conversations.

Analytics

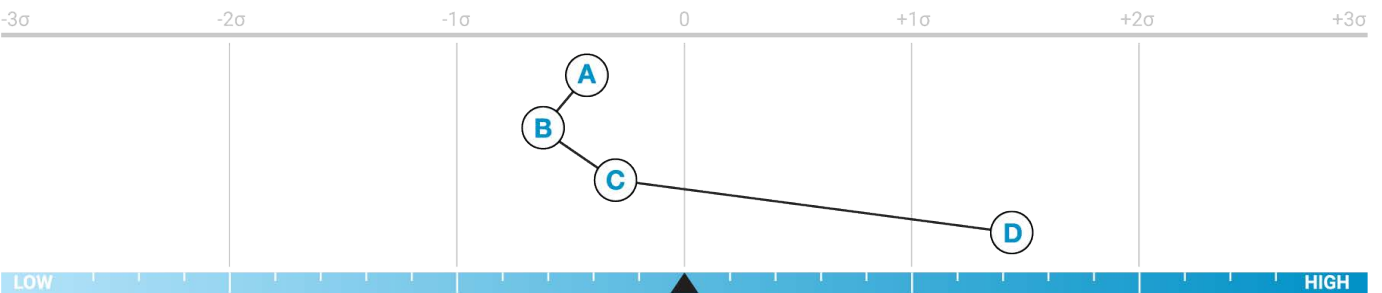
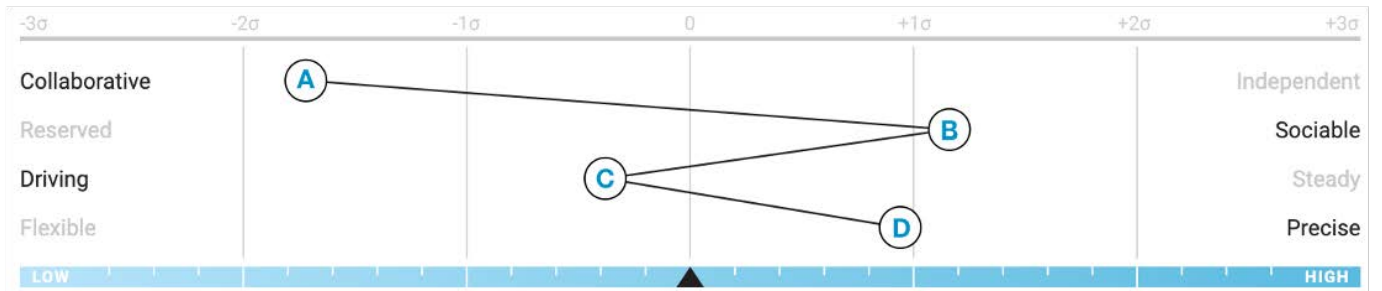
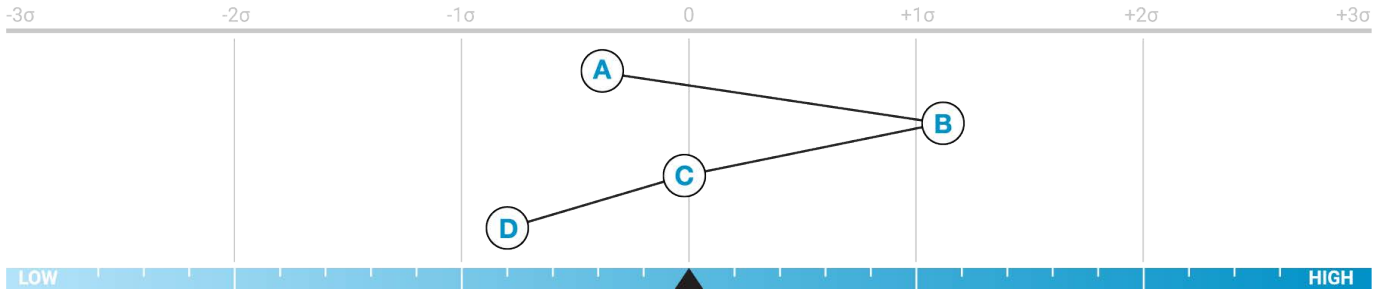
The PI Analytics reports allow organizations to view a team's average PI profile graph, in order to see the tendency for the majority of behavior on a given team. Analytics displays if there is a balance of behaviors, or more of a majority for a certain behavior, allowing teams and leaders to self-reflect on the strengths and gaps as a collective.



Activity: Speed Reading

Instructions:

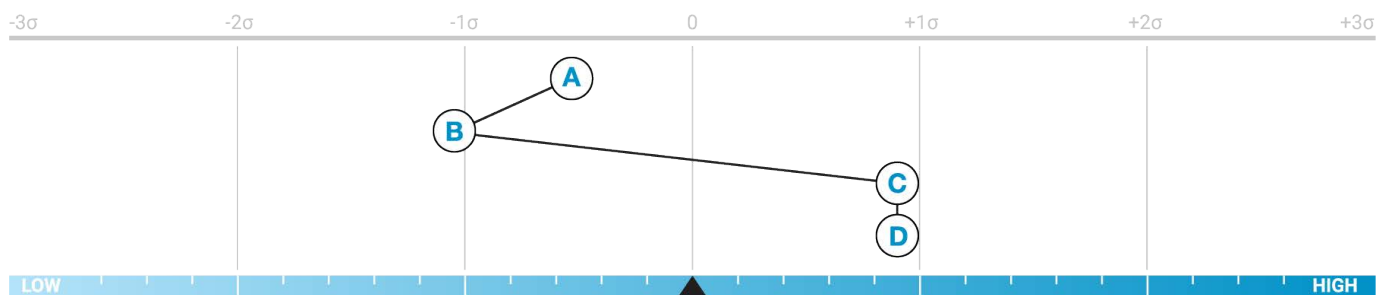
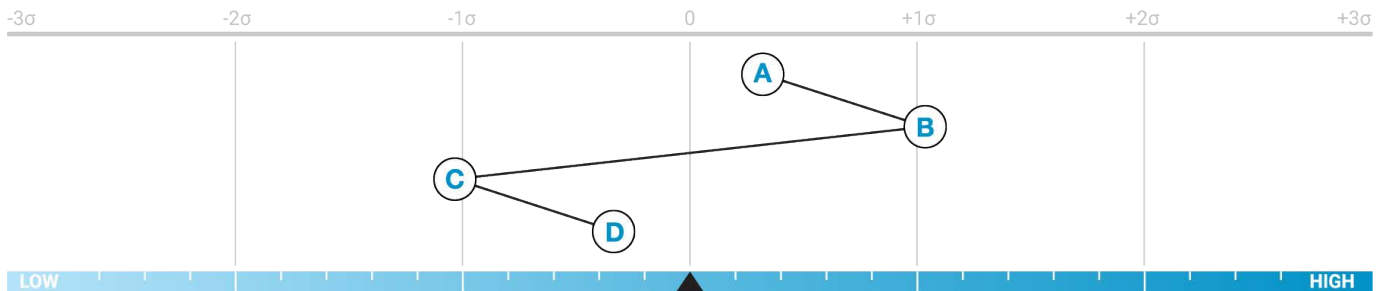
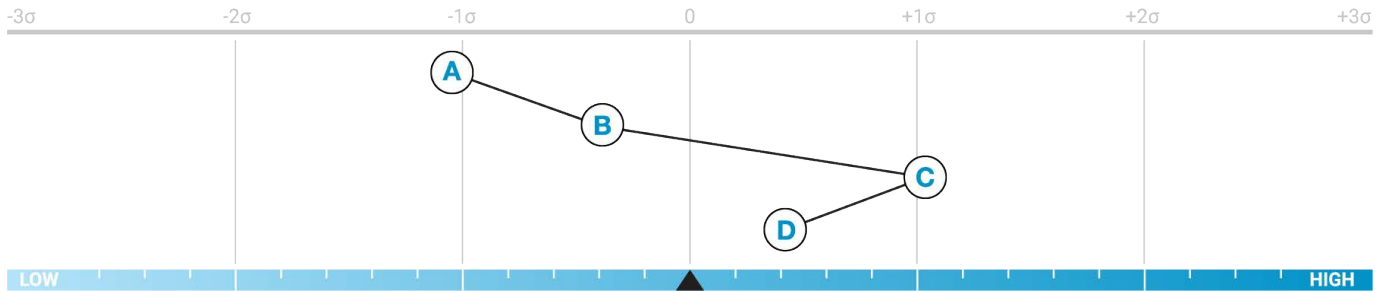
1. For each of the six patterns below, write down the top 3 Factor Combinations in rank order (strongest to least).
2. Write down the strongest Motivating Need for each pattern.
3. You will be timed! Work individually, your instructor will alert you when time is up.



Activity: Speed Reading, Continued

Instructions:

1. For each of the six patterns below, write down the top 3 Factor Combinations in rank order (strongest to least).
2. Write down the strongest Motivating Need for each pattern.
3. You will be timed! Work individually, your instructor will alert you when time is up.



Process for reading patterns:

1. Review the Six Factor Combinations in rank order - strongest to least strong. Describe the Factor combinations without using PI jargon, but with stories and examples of the behaviors.
2. Describe the Strongest Motivating Need (or highest/furthest right factor) and how that need is a strength.
3. Describe the E factor, in terms of decision-making.
4. Highlight if there are significant Self-Concept changes by describing how a person is trying to more of a given behavior (for example, "more urgent" instead of "less patient").



READBACK TIPS

FACTOR COMBOS

Go through all six, in ranked order.

"You are generally/very/extremely..."

"What I mean by that is... (strength/behavior)"

"What's great about that is..." OR "An example of that is..."

DECISION-MAKING (E FACTOR)

"You are generally/very/extremely Intuitive or Logical in your decision-making"

"What's great about that is. "

"Potential downsides to be aware of "

SELF-CONCEPT

"You told us that you are trying to be (a little/a lot) more..."

- Harmonious/Outcome-Oriented"

- Independent/Working through others"

"DOES THAT SOUND RIGHT?"

Give them a chance to respond.

Remember, keep it focused on positive.

"TELL ME MORE ABOUT THAT"

Let them talk and share their view.

Listening is close to loving.

DO

"I'd like to give you some feedback on your PI Behavioral Assessment result"

Maintain good eye contact

Show positive body language

Tell the story of those great behaviors

DON'T

Use A, B, C, D, M, E

Say "sigmas" or "norms"

Speak factor combo language

Use other PI Jargon

Point to the PI / rely on the graph itself

Use responsibly. People are complex. Patterns are great and support materials are helpful, but they're no substitute for the deep insights a well-trained PI Practitioner can provide. Contact MindWire for more information.

Breakout Session: Readbacks

Instructions:

You will be paired up. Please share your Behavioral Report with your partner.

1. Fill out the Readback Prep Form provided
 - a. Identify the Factor Combinations in rank order, write down the description from pages 10 and 11 in your People Data Toolkit
 - b. Identify the highest and lowest factor and the Motivating Need from page 6 in your People Data Toolkit
 - c. Identify 1-3 changes in the self concept and right down how the person is adjusting (trying to be MORE of a certain behavior)
 - d. Write down if their E factor is subjective (intuitive) or objective (logical) and what that might mean for this person
2. Choose who will go first and conduct your readback conversation
 - a. Introduce yourself and explain briefly what the Behavioral Assessment report contains (hint: Hard-wired strengths!)
 - b. Conversationally read through the notes you made on the readback prep form
 - c. Where applicable, tie in your observations to what you know about the individual and their role or experience
 - d. Ask the individual for feedback and pause for their questions
3. When you've finished, switch roles and have your second readback conversation.

Do:

- Practice! (It's the best way to get good at giving feedback and remembering combos)
- Be conversational, give examples
- Give the individual a chance to respond

Do Not:

- Talk about A, B, C, D, sigmas, norms, or other PI jargon



READBACK PREP FORM

"I'd like to conduct a readback of your PI results. The Predictive Index measures behavioral drives and tendencies. There are three patterns in the PI: the Self (one's natural behavioral style), Self-Concept (how an individual perceives the need to adapt), and Synthesis (how an individual is actually seen, observable behavior)."

Name _____

Title _____

Date _____

SELF

Natural behavioral style & strengths. Stays consistent through life.

Factor Combinations on the Self Graph

Begin with the widest spread. Spread determines intensity of language. *"Your results suggest that you are..."*

Combination	Spread	Description
__ / __		
__ / __		
__ / __		
__ / __		
__ / __		
__ / __		
Primary Factors (A, B, C, D)	(Highest & Lowest)	Behavioral Drive and Motivating Need

SELF-CONCEPT

How one perceives a need to adapt.

(Accurate for 60-90 days)

SYNTHESIS

How one is actually seen in terms of observable behavior

Changes from Self	E (Judgment)

Use responsibly. People are complex. Patterns are great and support materials are helpful, but they're no substitute for the deep insights a well-trained PI Practitioner can provide. Contact MindWire for more information.



READBACK PREP FORM

"I'd like to conduct a readback of your PI results. The Predictive Index measures behavioral drives and tendencies. There are three patterns in the PI: the Self (one's natural behavioral style), Self-Concept (how an individual perceives the need to adapt), and Synthesis (how an individual is actually seen, observable behavior)."

Name _____

Title _____

Date _____

SELF

Natural behavioral style & strengths. Stays consistent through life.

Factor Combinations on the Self Graph

Begin with the widest spread. Spread determines intensity of language. *"Your results suggest that you are..."*

Combination	Spread	Description
__ / __		
__ / __		
__ / __		
__ / __		
__ / __		
__ / __		
Primary Factors (A, B, C, D)	(Highest & Lowest)	Behavioral Drive and Motivating Need

SELF-CONCEPT

How one perceives a need to adapt.

(Accurate for 60-90 days)

SYNTHESIS

How one is actually seen in terms of observable behavior

Changes from Self	E (Judgment)

Use responsibly. People are complex. Patterns are great and support materials are helpful, but they're no substitute for the deep insights a well-trained PI Practitioner can provide. Contact MindWire for more information.

