

# The Self-Aware Leader

Harnessing PI to Understand Yourself  
and Inspire Others



# Agenda

- The Role of a Leader
- Where Performance Comes From: Drives, Needs, Behaviors
- Your Own Strengths and Behaviors as a Leader
  - PI Factors and Factor Combinations
- Self-Awareness & Adapting to Others
- Your Leadership Vision
- Action Plans

# What is the Job of a **Leader**?

How is a Leader different than a Manager?

What does a Leader “DO?”

When does a Leader “COACH?”

# Roles of a Leader

## Leadership

Fundamentally concerned with **vision and the future**

## Management

Fundamentally concerned with **productivity and results** from their staff.

## Doing

Concerned with **delivering results** and their own input.

## Coaching

Fundamentally concerned with **performance and learning**.

# Personal SWOT

| Strengths:                          | Weaknesses:                                     |
|-------------------------------------|-------------------------------------------------|
| How can I use each strength?        | How can I overcome each weakness?               |
| Opportunities:                      | Threats:                                        |
| How can I exploit each opportunity? | How can I defend against each threat?           |
| My Action Points:                   | My Development Plan:                            |
| What should you do?                 | Action + timing, skill development needed, etc. |

95% of people thought  
they were self-aware but  
in fact, 15% were.

[Harvard Business Review](#), "Working with People Who Aren't Self-Aware", 2018



99.9% of employees  
think self-awareness is  
important for managers.



A close-up photograph of a person's eyes, looking directly at the camera. The irises are a light brown color. Overlaid on the pupils are two small, glowing blue and orange digital icons, resembling stylized 'X' or 'Y' shapes. The background is dark and out of focus.

Self-awareness is the ability to see ourselves clearly; to understand who we are, how others see us, and how we fit into the world.

With your Predictive Index Behavioral Report, you learn:

Internal Awareness: one's own internal drives, needs and behaviors

External Awareness: how your styles impact others

# Reflecting on Your Results

In your groups:

1. Pick out two to three strengths from your Behavioral Report that you are proud of, as a leader.
2. Pick out one thing from your Behavioral Report that is true, but you wish wasn't, as a leader.
3. Discuss.

# Understanding Drives and Behaviors

# Why Do People Behave as They Do?

If you measure this...

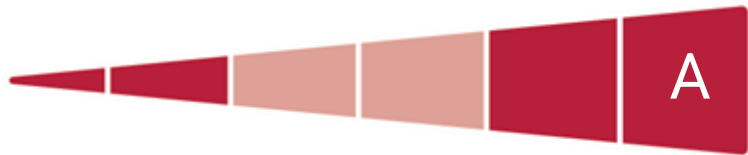
...you can predict this.

People have  
**DRIVES.**

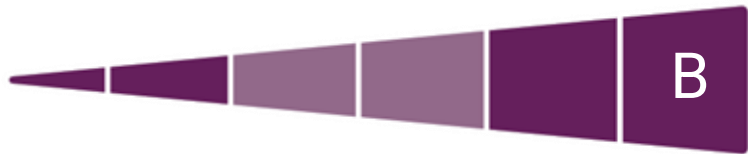
Drives create  
**NEEDS.**

Response to needs  
**BEHAVIORS.**

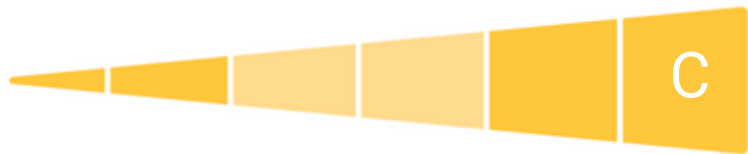
# What Drives Does PI Measure?



**Dominance:** The drive to exert one's influence on people or events



**Extraversion:** The drive for social interaction with other people (to do work)

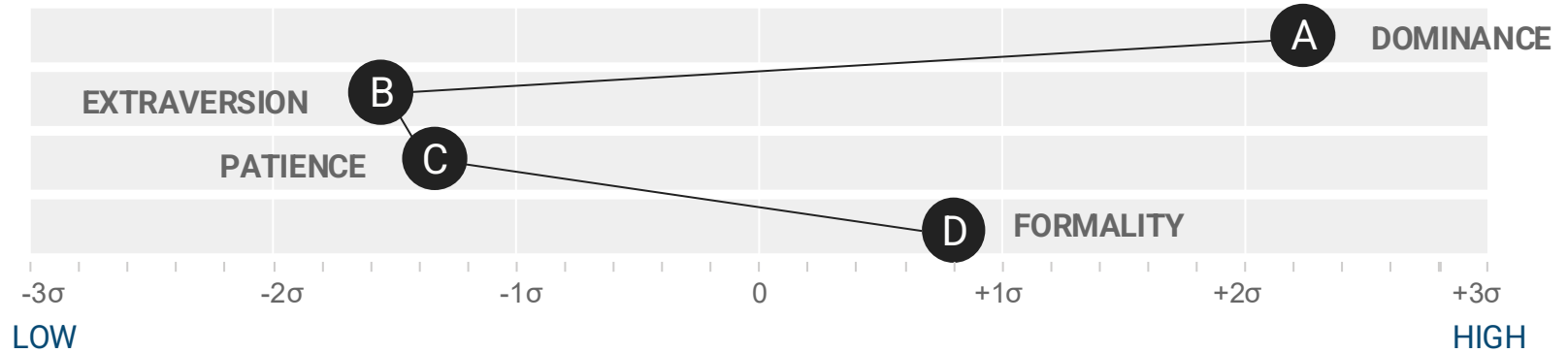


**Patience:** The drive for consistency and stability



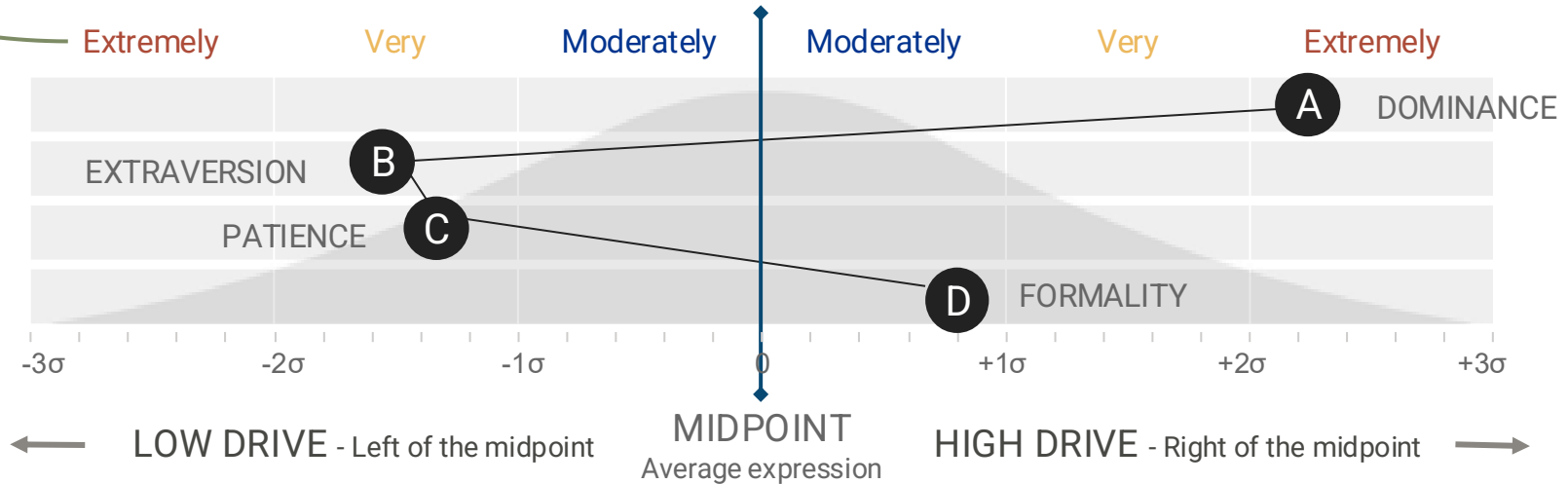
**Formality:** The drive to conform to rules and structure

# Pattern of Behaviors



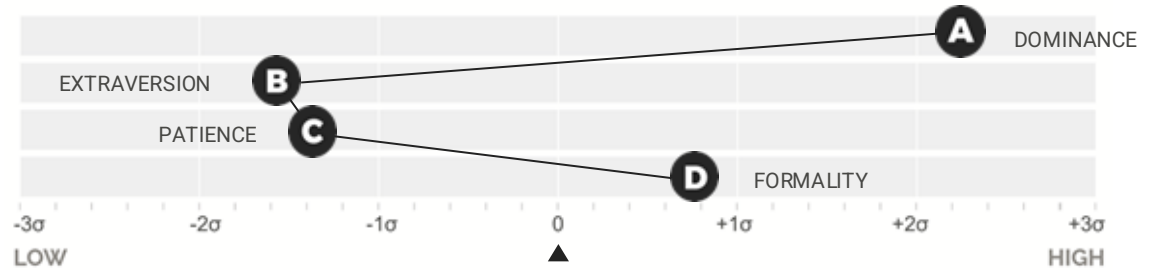
# The Behavioral Pattern

Consistency | Intensity | Strength | Predictability

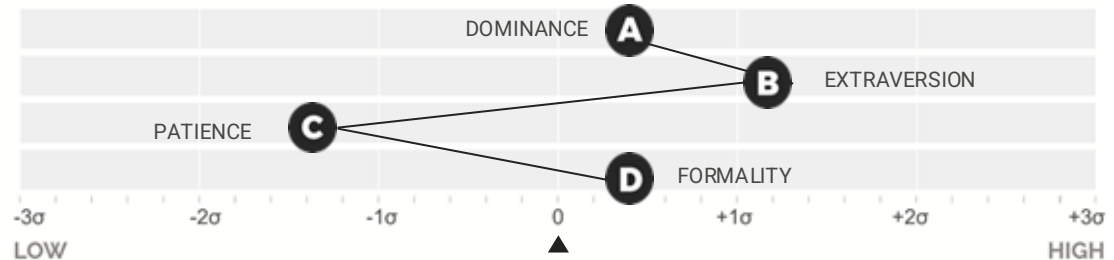


# The Whole Pattern

Self:  
**The REAL ME**  
(My natural behaviors)

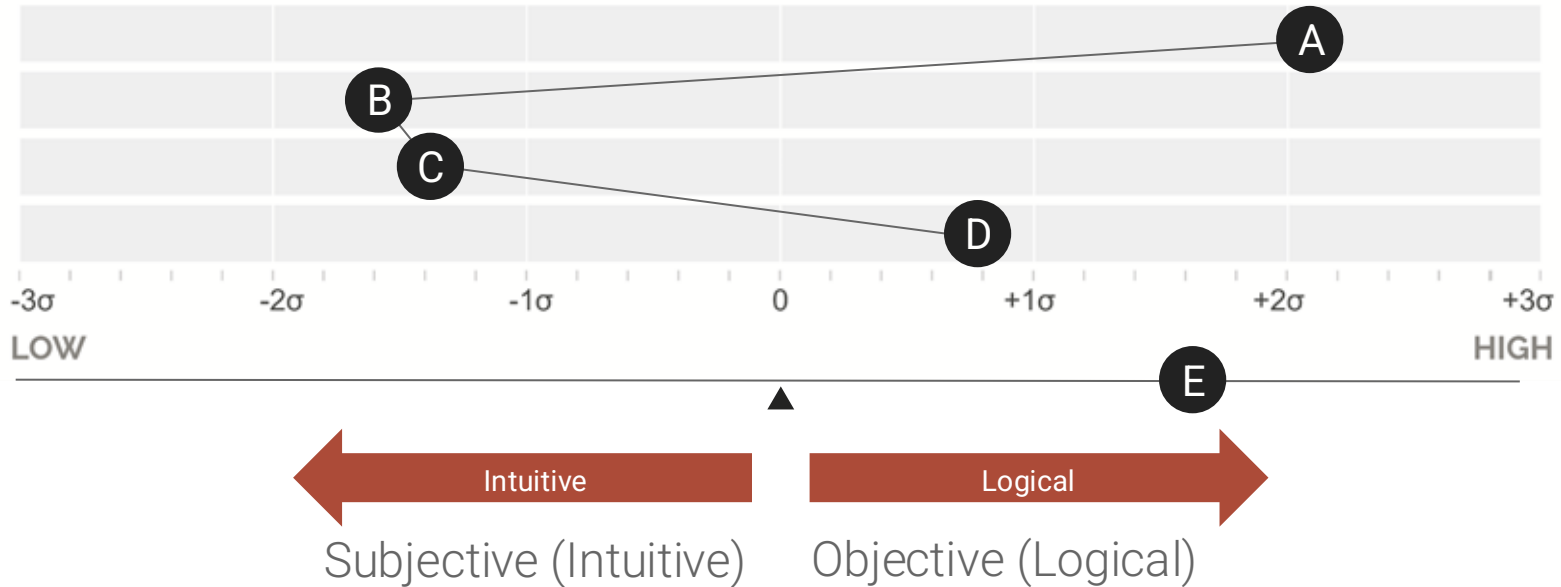


Self-Concept:  
**I am trying to be...**  
(Adapting behavior)

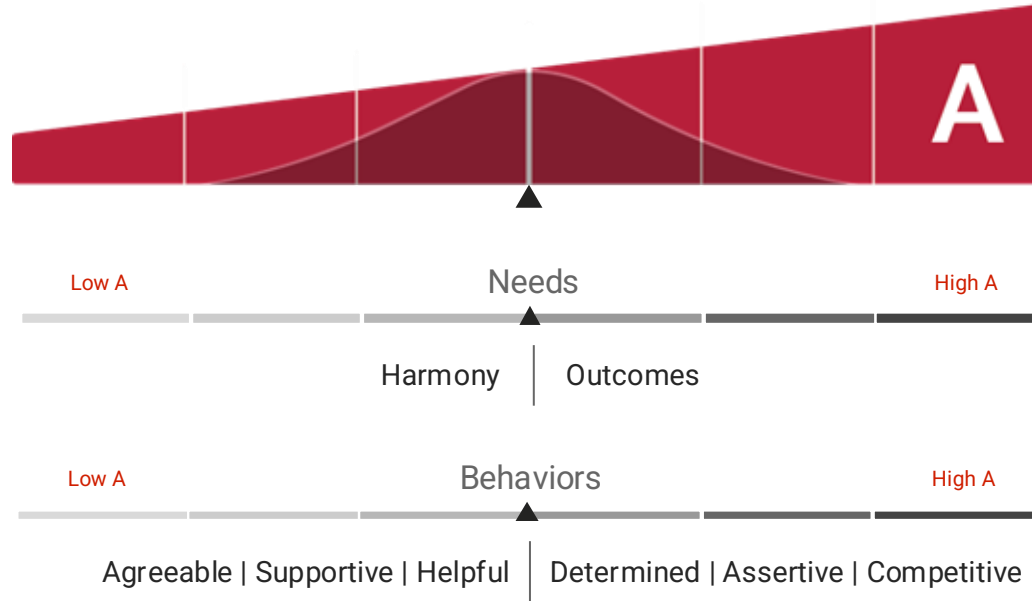


# Factor E

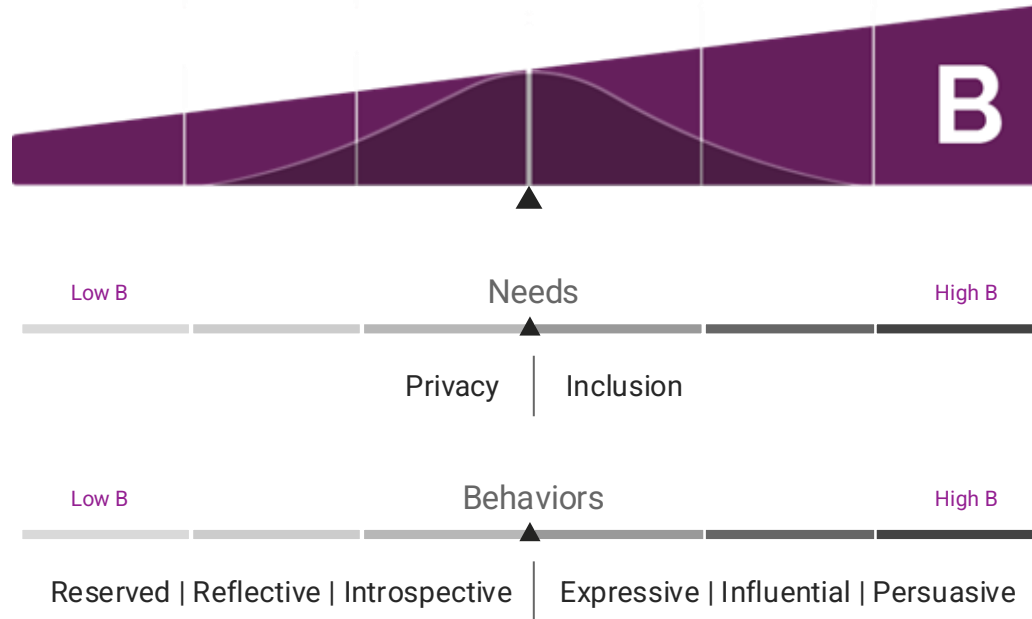
What kind of thinking is used when making decisions, judgments, or plans?



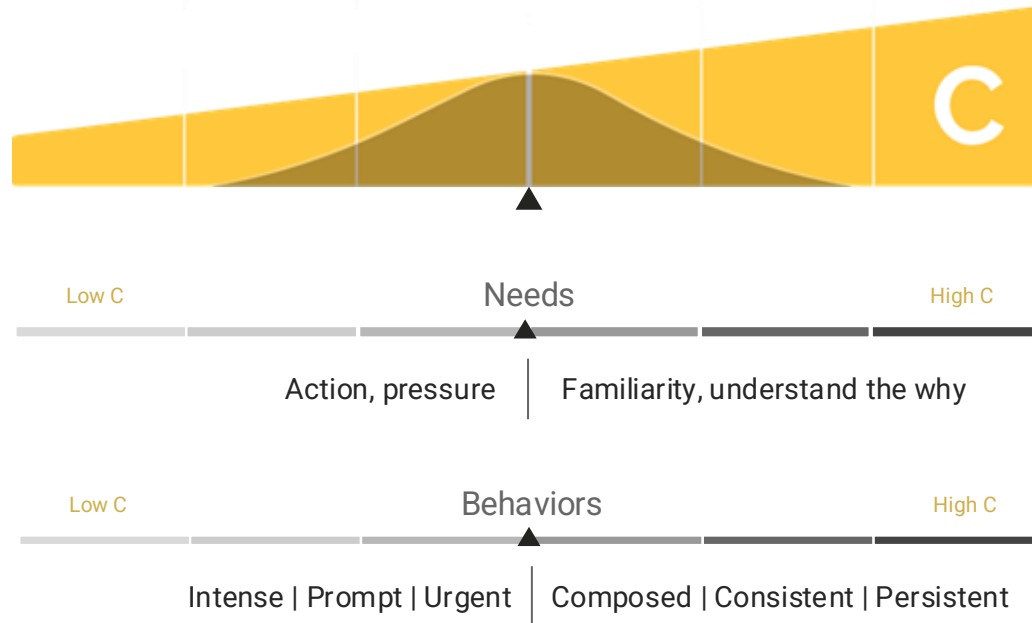
# Dominance



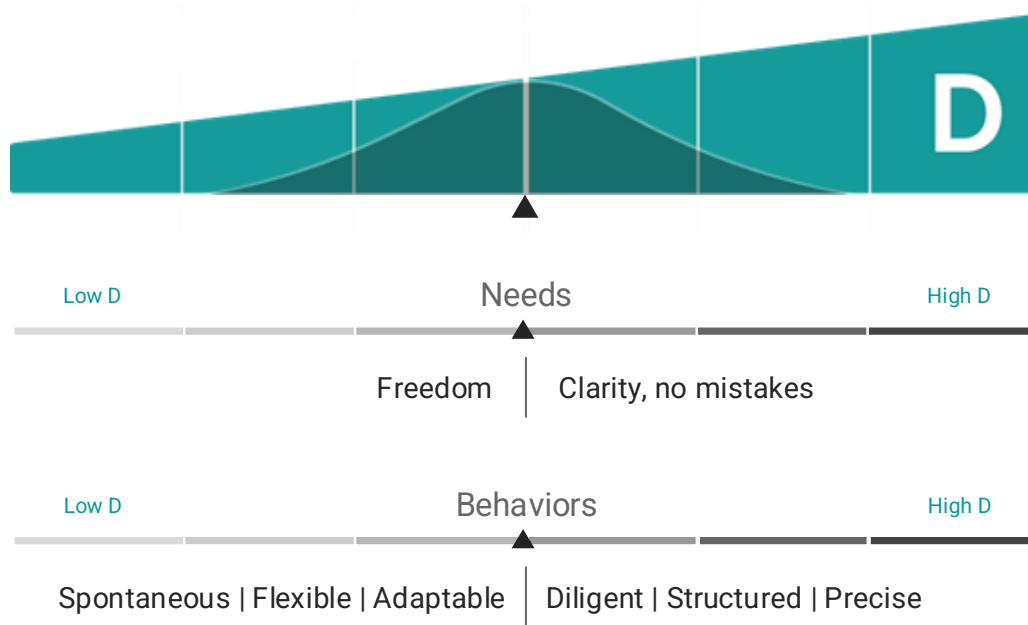
# Extraversion



# Patience



# Formality



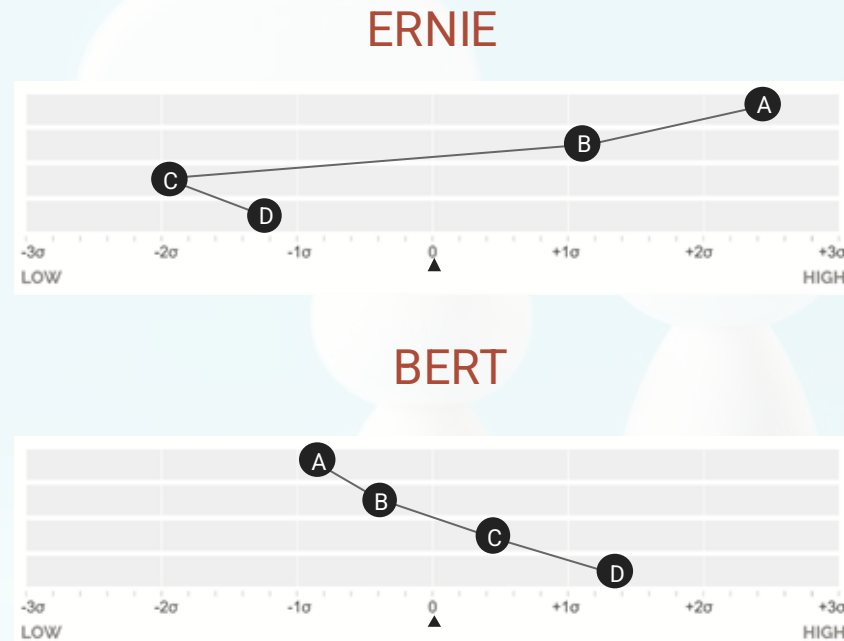
# Bert and Ernie

What are Ernie's strongest behaviors?

What will Ernie likely be good at/enjoy doing?

What are Bert's strongest behaviors?

What will Bert likely be good at/enjoy doing?

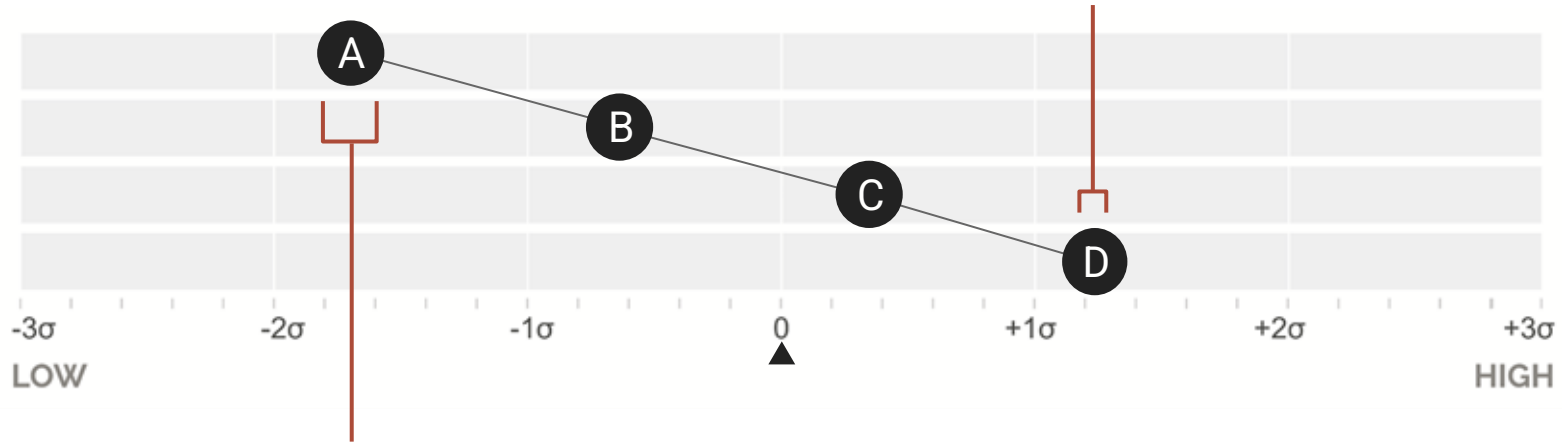


**Behaviors:** The result of a Drive  
(what you see)

**Motivating Needs:** How-to guide  
with others

# Identifying Motivating Needs

Identify the furthest RIGHT factor. That is the **strongest** Motivating Need. Coach to, communicate to, and keep top of mind.



Identify the furthest LEFT factor. This is likely the **next strongest** Motivating Need. This should color, flavor, impact how you approach the strongest Motivating Need.

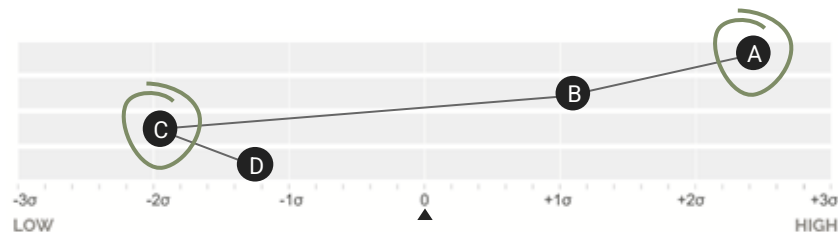
# Motivating **NEEDS**

|           | Motivated By:                                                                                                                                  | How to Connect:                                                                                                                                                                | Challenges:                                                                                                                      |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| High A    | Independence, <b>CONTROL</b> , competition, <b>OUTCOMES</b> , individual recognition.                                                          | Bottom line, direct to the point. Outcomes, outcomes, outcomes.                                                                                                                | They will argue with you. Everything is a chance to win.                                                                         |
| Low A     | Encouragement, reassurance, <b>HARMONY</b> , 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 or responding to a harsh approach.                |
| High B    | Positive, personal, public praise. <b>INCLUSION</b> , <b>SIGNS OF STATUS</b> , <b>ACCOMPLISHMENT</b> .                                         | Inclusion: share info, ask their opinion. Never criticize in public, build a relationship, recognition for how they do things with people.                                     | Will get out of a image.                                                                                                         |
| Low B     | Recognition for technical accomplishments/expertise; time to think. <b>FREEDOM FROM POLITICS</b> .                                             | Allow time to think, clear, factual communication, freedom from too much small talk, straightforward, analytical approach.                                                     | May not discuss feeling, "people..."                                                                                             |
| High C    | Paying attention to them, <b>SECURITY</b> , <b>STABILITY</b> , family-like work team, recognition for <b>LOYALTY</b> .                         | 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     | <b>VARIETY</b> , <b>CHANGE OF PACE</b> , 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    | <b>OPPORTUNITY TO GET THINGS RIGHT</b> , structure, plan, <b>SPECIFIC JOB KNOWLEDGE</b> , freedom from risk, <b>RECOGNITION FOR ACCURACY</b> . | 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     | <b>FREEDOM FROM STRUCTURE</b> , delegate details, give room to decide how. <b>BIG PICTURE FOCUS</b> .                                          | 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   | Being correct, ensuring the right decision, driven by data.                                                                                    | Logic, data, analysis, facts, evidence of why something will succeed.                                                                                                          | Will slow down or stop when they don't have enough time, data, info to decide.                                                   |
| Intuitive | 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.                                                              |

|        | Motivated By:                                                                         | How to Connect:                                                                                       | Challenges:                                                                                                       |
|--------|---------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| High A | Independence, <b>CONTROL</b> , competition, <b>OUTCOMES</b> , individual recognition. | Bottom line, direct to the point. Outcomes, outcomes, outcomes.                                       | They will argue with you. Everything is a chance to win.                                                          |
| Low A  | Encouragement, reassurance, <b>HARMONY</b> , 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 or responding to a harsh approach. |

# Insights: for Motivating, Coaching, Communicating

## ERNIE



|        | 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, <b>CONTROL</b> , competition, <b>OUTCOMES</b> , individual recognition. | Bottom line, direct to the point. Outcomes, outcomes, outcomes.                                                                              | They will argue with you. (Everything is a chance to win.)                                               |
| Low C  | Likes pressure, action oriented, high sense of urgency, change-oriented, fine with managing interruptions, multi-tasker. | Action/Not Enough To Do | <b>VARIETY, CHANGE OF PACE</b> , 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. |

# Motivating Needs

Look at your own top self graph and identify your strongest Motivating Need.

Describe to your partner: “If you were really going to be effective with me, two do’s/don’ts according to my motivating needs would be...”

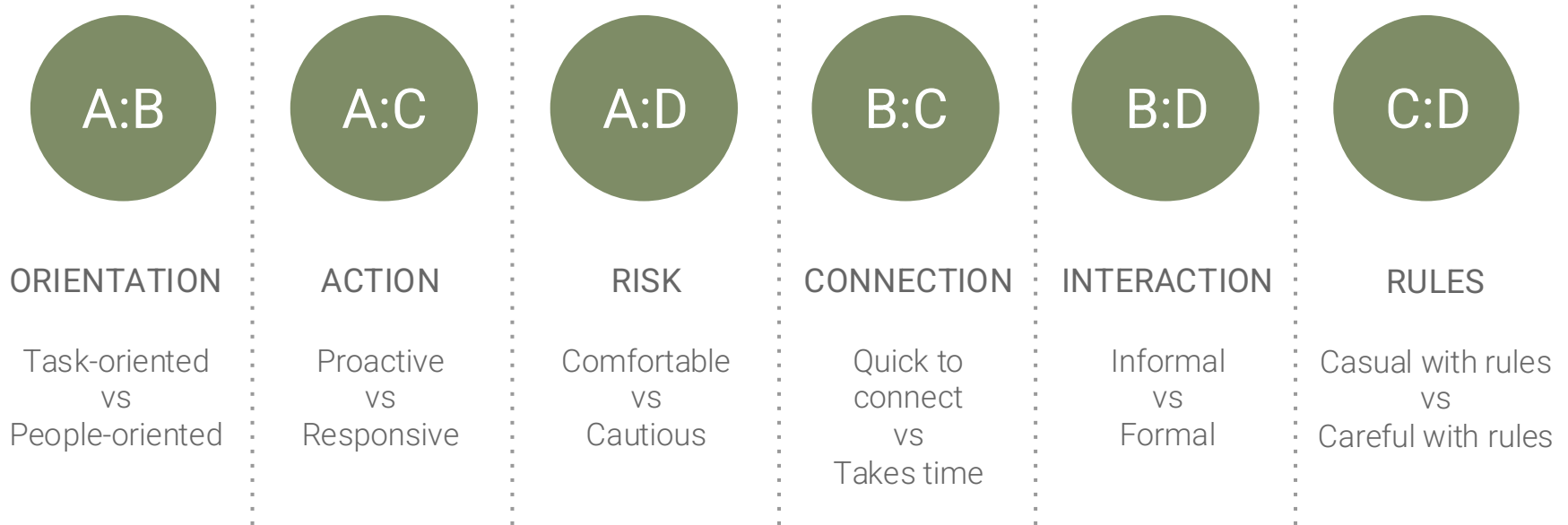


# Motivating Needs with Your Direct Reports

Not sure how to motivate? **Just ask!**

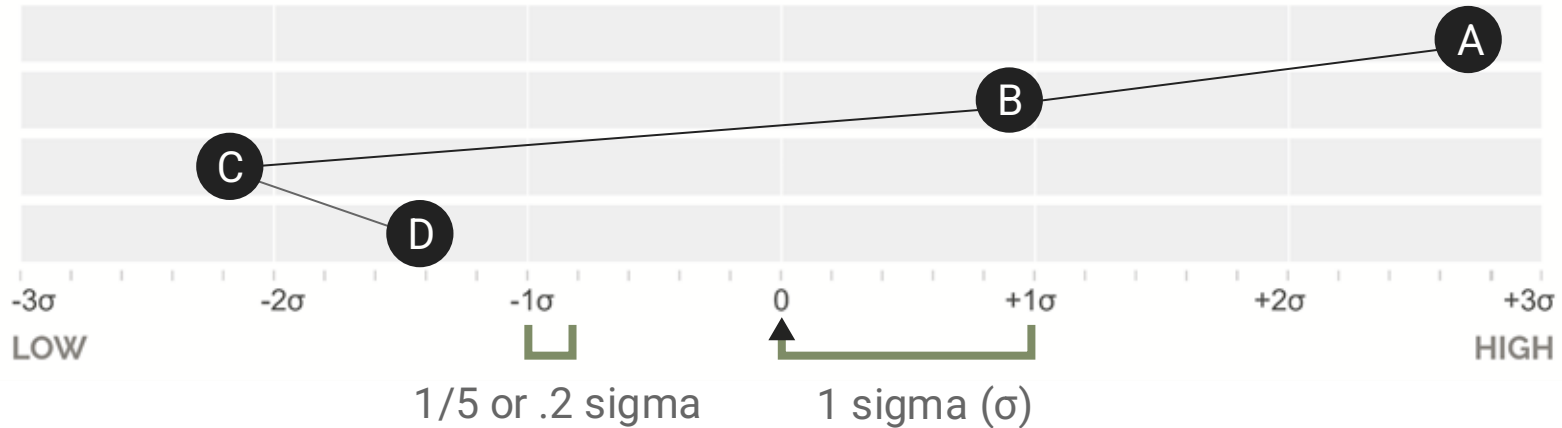
# Factor Combinations

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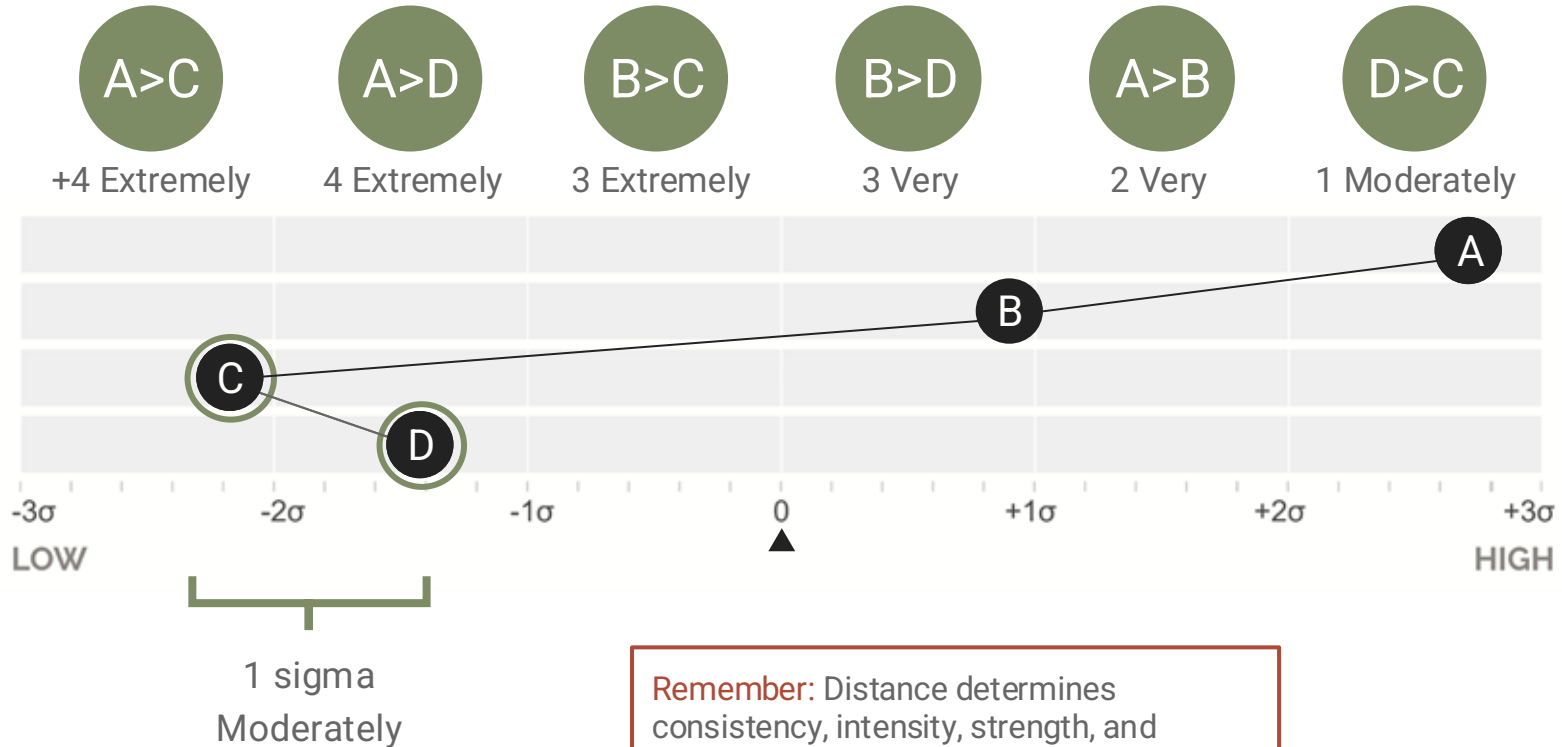
# Measuring Factor Combos

Determines consistency, intensity, strength, and predictability of the Factor Combination. The more distance between factors, the stronger the behavior.



What are the six different factor combinations in this pattern?

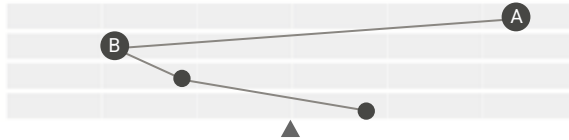
# Measuring Factor Combos



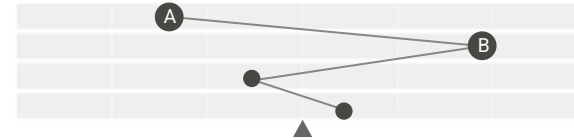
**Remember:** Distance determines consistency, intensity, strength, and predictability of the Factor Combination. The more distance between factors, the stronger the behavior.

# Understanding Factor Combinations

# A:B | Orientation



A>B Task-Oriented

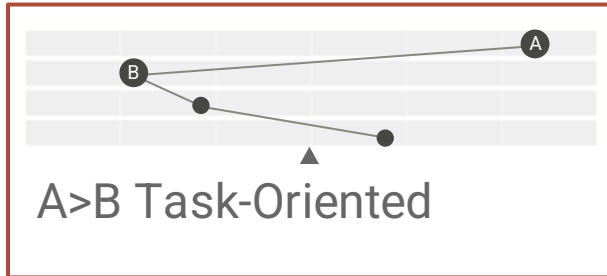


B>A People-Oriented

- Critical, creative thinker
- Technical orientation
- Inquiring mind
- Problem solver
- Limited delegation of authority

- Empathetic
- Persuasive
- Sociable
- Service-oriented
- Delegates authority
- Comfortable on a team
- Unselfish

# A:B | Orientation

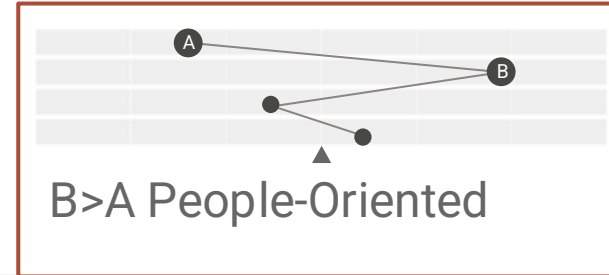


## STRENGTHS

- Clear direction; decisive
- Holds others accountable
- Critical thinking & problem-solving
- Strategic thinking
- Comfortable having difficult conversations

## CAUTIONS

- Tells more than persuades; can be blunt
- Finds it difficult to delegate authority
- Less coaching, teaching, sharing information



## STRENGTHS

- Delegates authority
- Naturally coaches, teaches, shares information
- Builds strong buy-in, consensus, loyalty
- Success of directs is more important than their own success

## CAUTIONS

- May trust too much and not hold people accountable soon enough
- Confident they can “fix” anyone
- May ignore or not address problem performers
- May struggle with conflict

# Reflection

1. In your workbook, note the **strengths** that resonate for your factor combination.
2. Note the **cautions** that resonate.

## Questions:

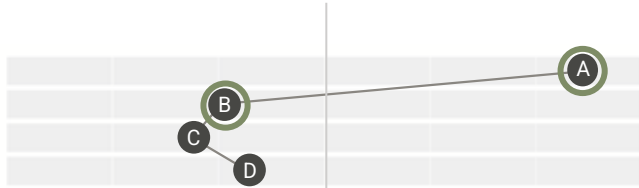
How has this strength been a leadership asset for you?

What's one caution you want to work on and why?

Discuss what you wrote down with your partner.

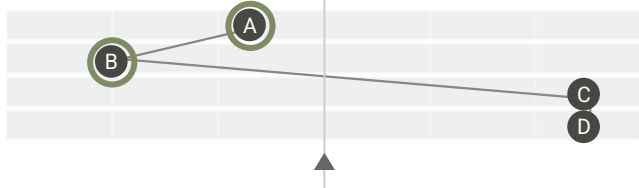


# Factor Combo Variations



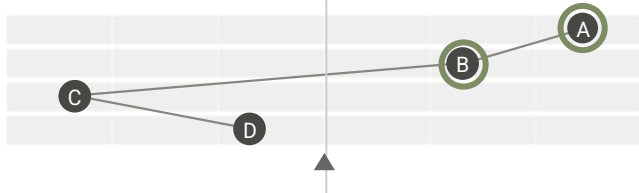
Across the midpoint

Toolkit  
Pages  
10-11

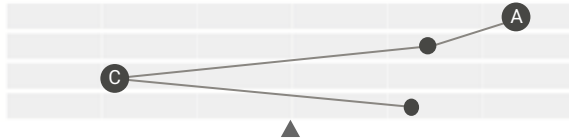


Both low

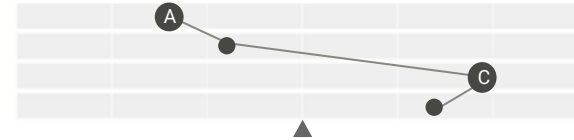
Toolkit  
Pages  
12-17



Both high



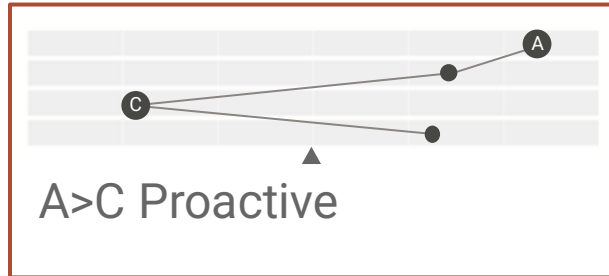
A>C Proactive



C>A Responsive

- Takes initiative
- Competitive, fast-paced
- Driven to get things done
- Positive response to pressure
- Achievement-oriented
- Impatient with routine

- Consistent with repetitive work
- Cooperative with others
- Tolerant
- Patient, steady
- Dependable, easy-going

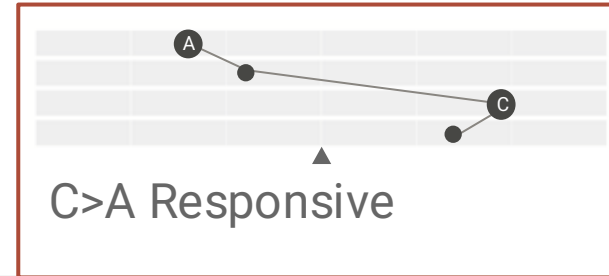


## STRENGTHS

- Pushes people, teams, orgs to take action, make decisions, get outcomes - with urgency
- Handles variety, pressure, rapidly changing priorities productively
- Does not wait for permission

## CAUTIONS

- Listens sparingly, at best
- Lots of starting, less focus on finishing
- Will overcommit
- Can overwhelm and wear some people out

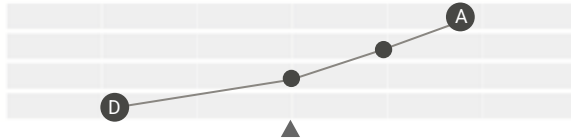


## STRENGTHS

- Excellent listening, people feel heard and valued
- Thoughtful + methodical + consistent = predictable/easy to trust
- Approachable and accessible
- Stick with it, don't give up easy

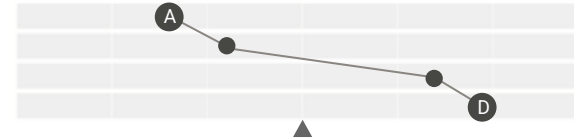
## CAUTIONS

- May not push people, teams, orgs fast enough to make decisions, take action
- May be too accommodating of others
- May get bogged down under lots of pressure, too many changing priorities



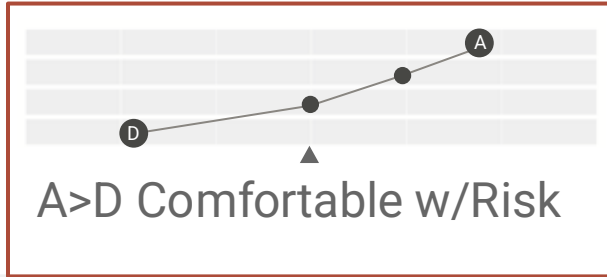
A>D Comfortable with Risk

- Independent
- Individualistic
- Self-confident
- Firm, decisive
- Venturesome
- Resistant to authority



D>A Cautious with Risk

- Cooperative, supportive
- Willing and helpful
- Need for rules and structure
- Accurate and careful
- Concerned about criticism
- Conservative

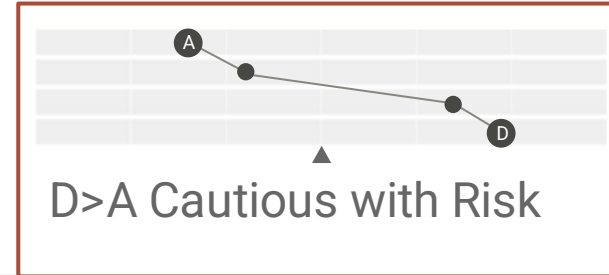


## STRENGTHS

- Decisive, even when uncertainty is present
- Focuses on the big picture – outcomes, strategy, progress, winning over perfection
- Tolerant of mistakes, views it as part of the process
- Delegates details, lets people own the details/how

## CAUTIONS

- May not provide enough clarity of expectations, depth, follow-up on details
- May be disinterested in spending time assisting direct reports on items related to details/process/structure
- May not communicate which details they do and do not want to be involved in



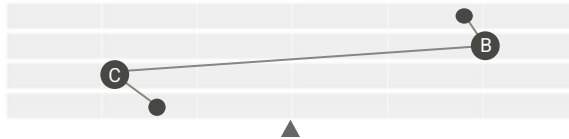
## STRENGTHS

- Provides depth of clarity, expectations, training, information to directs
- Helpful, willing, supportive - will jump in, and do what it takes to help get things right
- High standards for work quality and depth of expertise for how to achieve quality

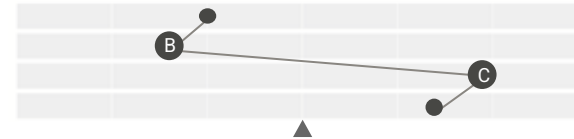
## CAUTIONS

- May not delegate accountability or tasks soon enough, often enough, consistently enough
- Personal standards of excellence may be unnecessarily high for others
- Mistakes can be seen as a problem, rather than the natural part of learning and developing process

# B:C | Connection



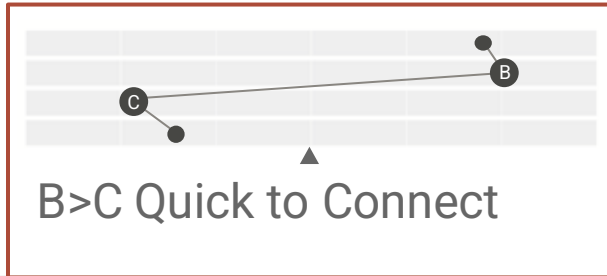
B>C Quick to Connect



C>B Takes Time to Connect

- Fluent, fast-talking
- Lively, enthusiastic
- Optimistic style of expression
- Persuasive, stimulating
- Motivates others
- Positive communication

- Reserved, quiet
- Serious with unfamiliar people
- Comfortable with the familiar
- Introspective
- Takes time to think
- Organizes thinking before expressing self

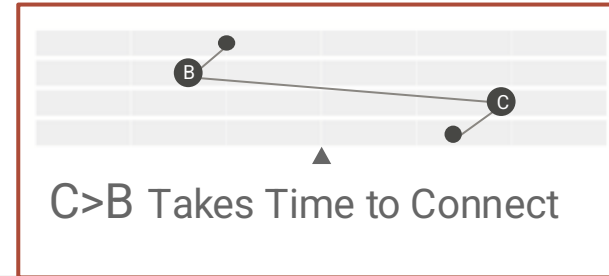


## STRENGTHS

- Builds rapport and relationship
- Shares information, you usually know what they are thinking
- Building positive relationships is important to them

## CAUTIONS

- Talk more than they listen
- Can be seen as self-interested and superficial
- Can be overly focused on impressing others



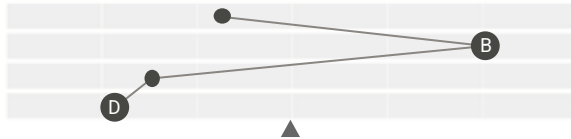
## STRENGTHS

- Good listeners
- Thoughtful, analytical, deliberate and consistent in their approach – people know what they can expect
- Healthy, natural skepticism

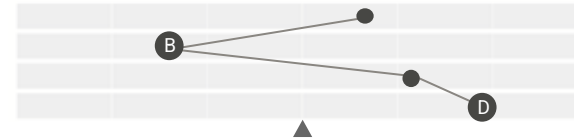
## CAUTIONS

- Can be hard for others to read – people may mistakenly attach negative connotations to their quiet, reflective nature
- May not share as much information, feedback, etc. as people need

# B:D | Formality



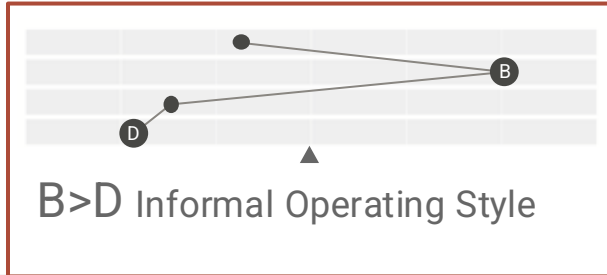
B>D Informal Operating Style



D>B Formal Operating Style

- Extraverted, outgoing
- Uninhibited expression of friendliness
- Poised
- Informal in social situations
- Enthusiastic, persuasive talker
- Engaging conversationalist

- Serious (about the work)
- Disciplined, sincere
- Reserved, formal, quiet
- Factual conversationalist
- Sensitive to criticism
- Cautious with new people

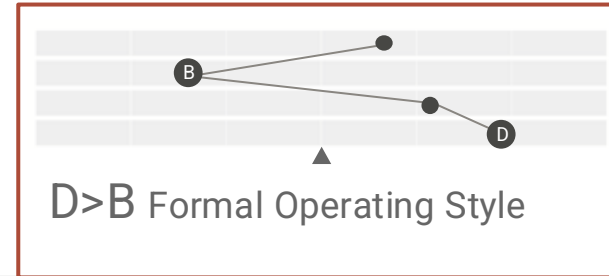


## STRENGTHS

- Motivating, inspiring, visionary – gets people excited about what's possible
- Adept at adjusting approach to meet needs of a wide variety of people
- People win over rules – comfortable with the ambiguity/gray surrounding people-related issues

## CAUTIONS

- Shares half-baked ideas as they occur
- May not provide the structure/ thoroughness that some need
- Plan B, C, D is sometimes just “I’ll cross that bridge when I get there.”



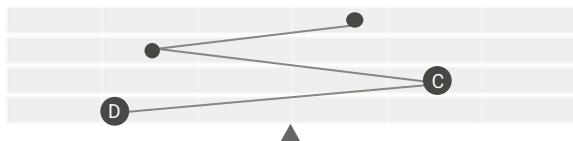
## STRENGTHS

- Structured and process-driven – creates or defines the right way to do things
- Provides lots of clarity to employees
- Candid, straightforward communicator

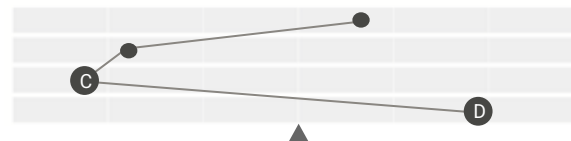
## CAUTIONS

- Naturally find delegation very difficult
- Hesitate to share information until things are fully complete/finished
- Exacting standards that few others meet

# C:D | Rules



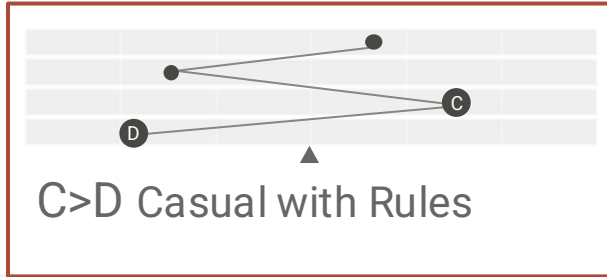
C>D Casual with Rules



D>C Careful with Rules

- Persistent, stable
- Casual
- Limited concern about rules or details
- Comfortable with ambiguity
- Easy-going, relaxed

- Conscientious
- Thorough, precise
- Concerned with rules and accuracy
- Strong follow-up
- Strict about punctuality and correctness
- Comfortable with clarity



## STRENGTHS

- Creative, innovative, unconventional thinker
- Comfortable with ambiguity
- Calm in a crisis, views mistakes as part of the natural learning and improvement process

## CAUTIONS

- May not follow up or follow through on certain details, tasks, etc. once assigned (assumes completion)
- May underestimate and under provide structure that others may need



## STRENGTHS

- Strong follow up, follow through
- Provides clarity of expectations
- Have built contingency plans

## CAUTIONS

- Prone to micromanaging
- Often is not delegating nearly enough
- Exacting standards that few others meet

# Overall Reflection

## Reflect on your **strengths** across all Factor Combinations:

Write your two to three biggest leadership strengths and one commitment you will make to further leverage these strengths.

## Reflect on your **cautions** across all Factor Combinations:

Write one caution that stood out as the most important to address and action you will take to address the identified caution.

# Your Sphere of Impact

People who impact  
your success:

*Direct reports*

*Peers*

*Boss*

*Colleagues*

*Executives*

*Vendors*

*Customers*

People you naturally  
“click with”



**Hope** doesn't need to be  
your **Strategy!**

If you get good at this,  
you can be successful  
with nearly anyone!

# Direct Report Action Planning

As we go through the next section, look at one of your direct reports and take note of their factor combination.

Write down one idea to start, stop, or continue for your employee, for each factor combination.

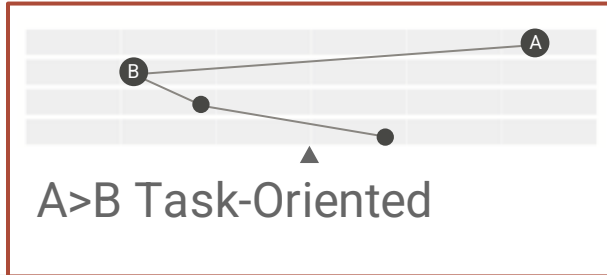
## Build Your Action Plan

|     | Employee Name: | Employee Name: | Employee Name: | Employee Name: |
|-----|----------------|----------------|----------------|----------------|
|     |                |                |                |                |
| A:B |                |                |                |                |
| A:C |                |                |                |                |
| A:D |                |                |                |                |
| B:C |                |                |                |                |
| B:D |                |                |                |                |
| D:C |                |                |                |                |

# How to Adjust

# A:B | Orientation

When  
working  
with A>B



Be direct

- Skip the fluff
- Give the unvarnished truth

How to  
adjust:

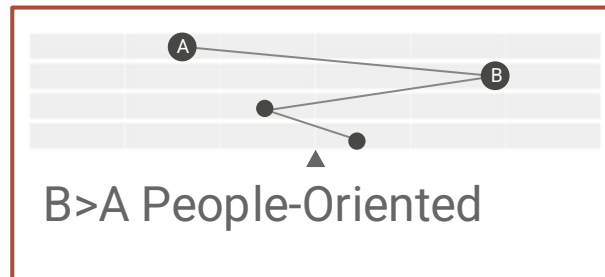
Let them figure out how

- They don't want to "think out loud" with you

Provide clarity of expectations

- Substance of outcomes & deliverables
- High levels of accountability

When  
working  
with B>A



How to  
adjust:

Make time consistently for discussion

- Share information and ask for their thoughts
- Don't cancel 1:1s
- Make some time for them to think out loud

Provide more **verbal** feedback than YOU would need (or want)

- Recognition for how they do things
- Reinforce anything you would like to see more of

# Example

## Build Your Action Plan

Employee Name: Employee Name: Employee Name: Employee Name:

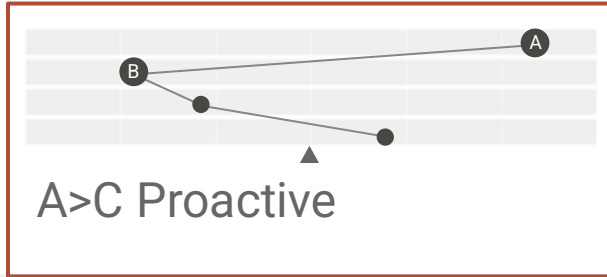
John

A>B

A:B

Be direct, skip  
fluff.

When  
working  
with A>C



How to  
adjust:

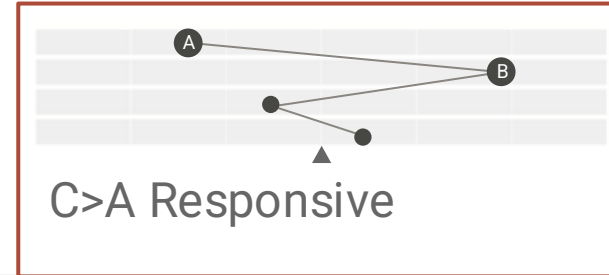
Cut to the chase

- Focus on action and where you're going first
- Spend far less/little time on context, backstory
- Give a decision now

Load them up

- Give them a workload with challenge, variety, time-pressure
- Ensure the volume and pace of work is at a level you would find cruel and unusual if done to you

When  
working  
with C>A



How to  
adjust:

Slow down to speed up

- Help them understand why
- Give them time to think/prep

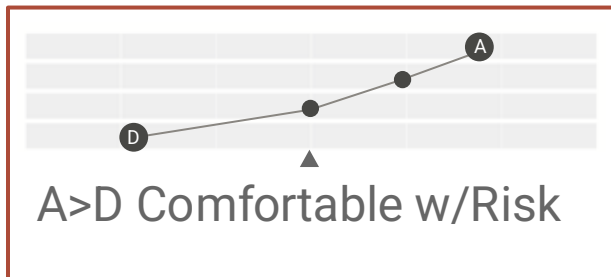
Be clear about timelines/deadlines

- Help them prioritize

Don't hog the mic

- Give them room to think, then listen
- Don't mistake their good listening for agreement

When  
working  
with A>D



How to  
adjust:

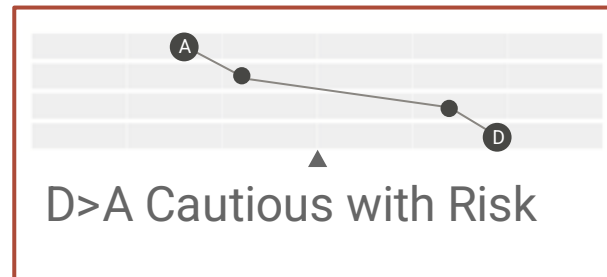
Define the non-negotiable outcomes and guardrails

- Let them decide how to get there
- Provide clarity that failure to deliver on non-negotiables will result in closer management

Delegate both decisions and tasks

- On items that are more important than you're comfortable delegating
- Sooner than you'd like
- To people who haven't fully earned your trust
- Without micromanaging once you do

When  
working  
with D>A



How to  
adjust:

Provide depth and clarity of expectations up front

- In writing, if possible
- Then ask, “what else do you need to get started?”
- This is not micro-managing

Provide more ongoing feedback than you would need

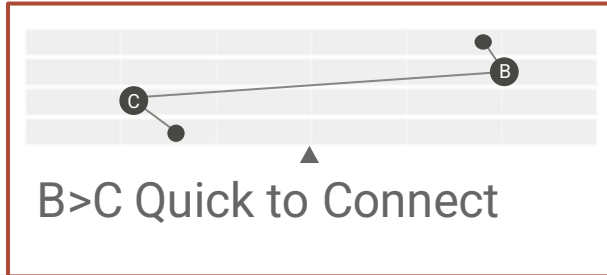
- Things that they are doing well and right, things they could/should course-correct, even if minor

Do not tell them “don’t worry” or “it’s no big deal”

- They will worry more
- Reframe what a mistake is and is not

# B:C | Connection

When  
working  
with B>C



How to  
adjust:

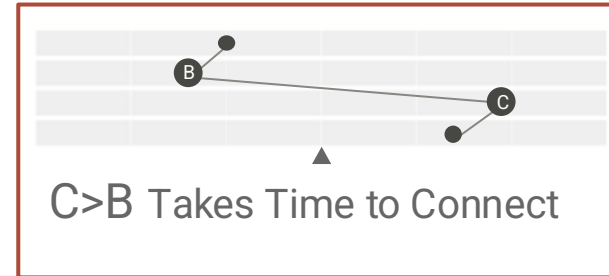
Make consistent time to allow them to talk/share (think out loud)

- Don't cancel 1:1s even if you don't have something to talk about – they do!

Consistently ask for their thoughts, input, feedback and ensure they feel “in” on things

- Share information about what's going on, sooner and more often than you would want/need

When  
working  
with C>B



How to  
adjust:

Give advance notice and/or time to respond

- Agenda items, topics of discussion
- Time to respond, when you have to spring something on them at the moment

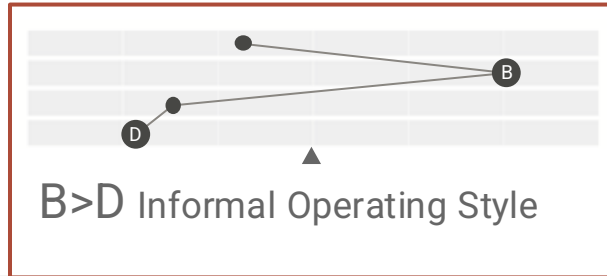
Be factual, straightforward, and substantive in your communication style

- Don't force mandatory fun (ice breakers)

Don't mistake quiet reflection for lack of passion, interest, or energy. They are simply just thinking

# B:D | Formality

When  
working  
with B>D



Make time for them to share ideas, brainstorm out loud

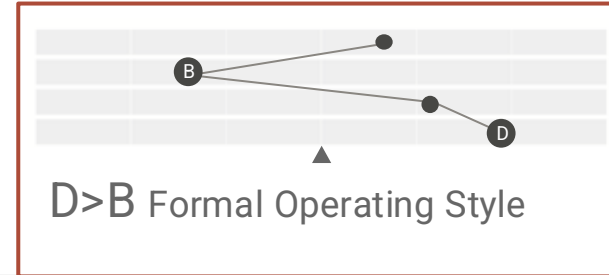
- Don't cancel 1:1s

How to  
adjust:

Don't mistake energy, excitement, expression of ideas as a "final product"

- Give room for idea generation and help them with outcomes, structure and process to get a good idea to the finish line
- Provide clarity on outcomes/deliverables, timelines, and guardrails – but give them room to figure out the "how"

When  
working  
with D>B



How to  
adjust:

Provide clarity of expectations

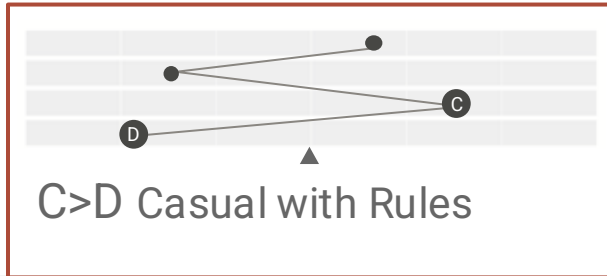
- Details around exact deliverables, firm timelines, expectations, etc.
- Be clear about what decisions you expect them to make

Be specific and very straightforward

- Facts, not fun (when it comes to work)
- Don't try to be persuasive, just be clear and direct around what's needed

# C:D | Rules

When  
working  
with C>D

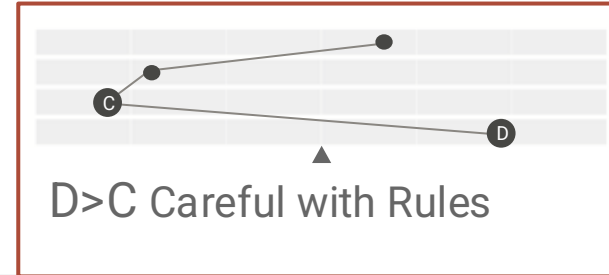


How to  
adjust:

Provide clear expectations on outcomes, guardrails

- Let them figure out how
- Make it clear that not meeting expectations or staying within guardrails will result in closer management by you

When  
working  
with  $D > C$



How to  
adjust:

Provide clarity of expectations

- Deadlines, timelines, exact deliverables and other details that would help someone know what right/success looks like

Ongoing feedback

- What they are doing well and what they need to course correct on along the way, not just at the end
- Ask “what else do you need?” in order to help them get started

# *Building a Plan*

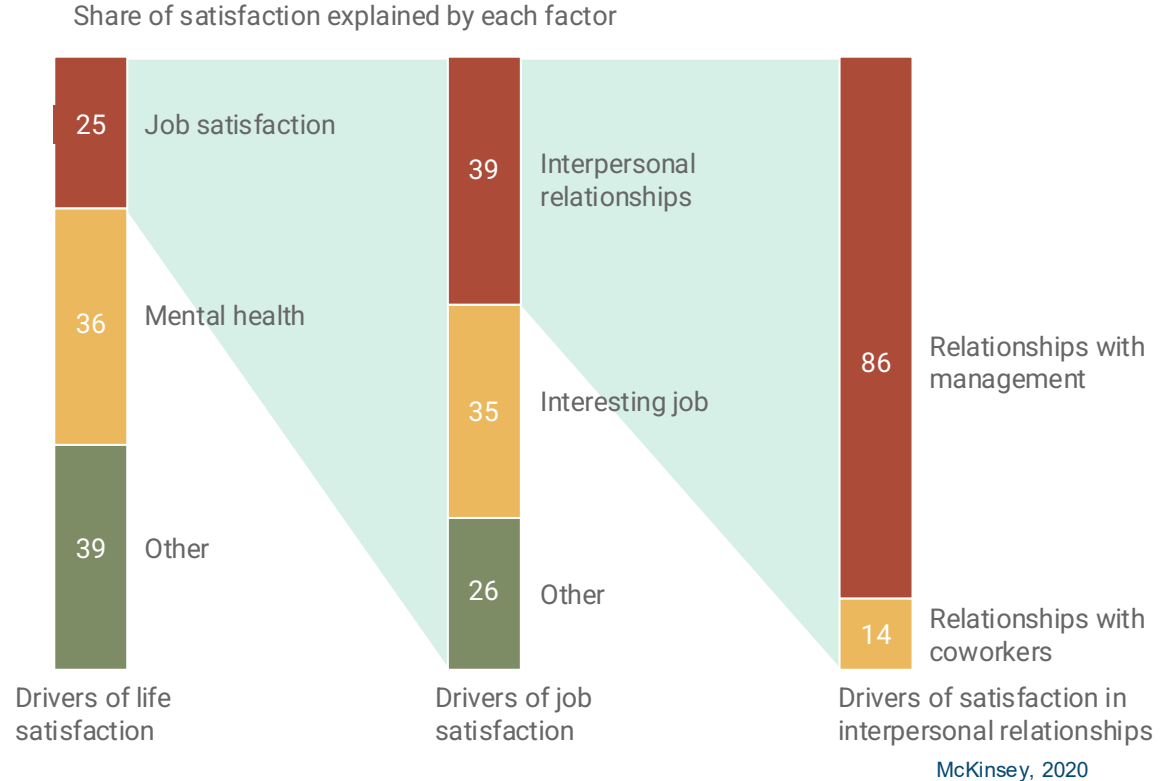
Review the notes you took on action items for your employee.

Pick one item that you can implement and decide when you will complete the action.

Share with your partner.

# Relationships with Management

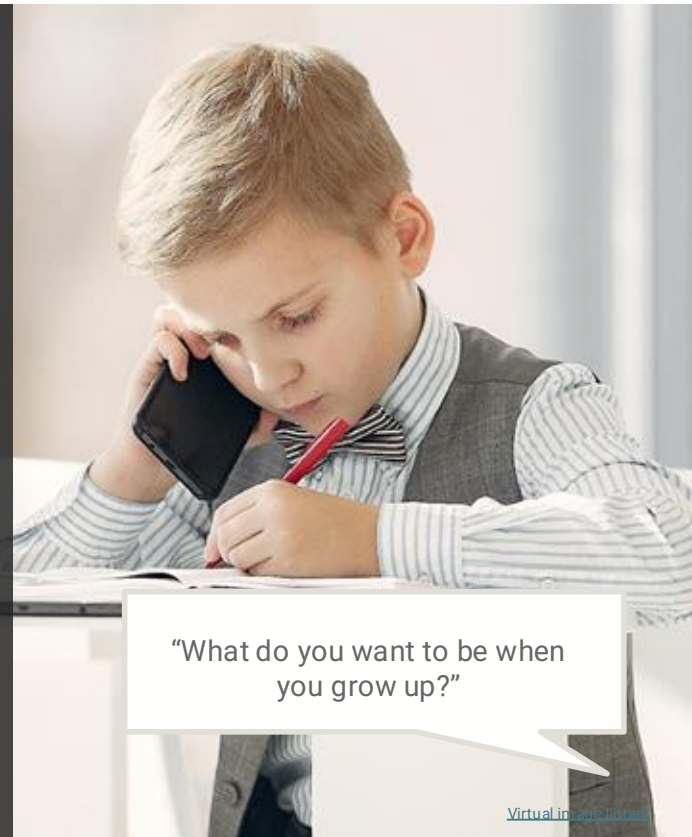
Relationships with management are a **critical factor** in employee's life satisfaction.



# Your Personal Leadership Vision

How do you want others to **describe you as a leader** “at the dinner table”?

1. Think about the leader you want to be. Browse the pictures and select one that “speaks” to you, in terms of your leadership.
2. In your workbook, write why your picture “spoke” to you in terms of your leadership.
3. Identify one commitment/action you’ll take to stay focused on your leadership vision.
4. Discuss with a partner at your table:
  - What your leadership vision is for yourself and why the photo you selected spoke to you.
  - The one thing you’re going to work on, commit to, keep in front of you, etc. and HOW you’re going to do that.



“What do you want to be when you grow up?”

[Virtual Image Library](#)

# Wrapping up

Write in your workbook and be ready to share with the group:

1. What ONE most important action/commitment will you will take? Include WHEN you will take it and how you'll know you've been successful.
2. Choose an accountability partner.
3. Share your commitment with them and describe what would keep you accountable.
4. Be prepared to share out loud.