

The facilitator's guide to embedding Insights in 90 days

Congratulations on your new role!

When you move to a new organisation, your Insights license moves with you.

Think of it like opening your suitcase after a trip: all the tools, colour energies and connection-building are ready to help you make an impact.

So go ahead! Introduce your team to Insights. Let's make your new start even brighter.

About this guide

We built this guide to help movers and shakers like you get the most out of your Insights Discovery license at your new organisation.

Over 90 days, this guide will help you embed Insights Discovery, build lasting impact and show the value of your expertise.

You can expect to:

- ✓ Have at least one visible success story from a pilot
- ✓ Be using Insights language in everyday interactions
- ✓ Have leadership support for ongoing rollout

**Stage 1: Build awareness
and secure buy-in**



**Stage 2: Pilot and
demonstrate value**



Stage 3: Scale and embed



**Included in your annual
Insights licensing fee**



At Insights, our purpose is to **make a positive difference** in the world.

Today, that means **empowering you** to embrace this new chapter with confidence and spark the transformation your new organisation is waiting for.

Stage 1: Build awareness and secure buy-in

0–30 Days

1 Assess the environment

In the first 90 days, much of your time is spent understanding your new organisation’s culture and dynamics, and the existing tools your team uses to develop people.

This is a good opportunity to identify if there’s “assessment fatigue” or openness to new frameworks. Even if fatigue is low, you can explore ways Insights can enhance existing tools.

You may find it helpful to position Insights as a good alternative or supplement to these common assessment models...

Instead of...	Why Insights is a good alternative
Myers Briggs Type Indicators (MBTI)	<ul style="list-style-type: none">✔ Simpler & stickier framework.✔ Insights 4 colours are easier for teams to adopt in daily language than MBTI’s 16 acronyms.✔ Profiles feel more dynamic (not fixed boxes).✔ More practical for quick team interventions.
Everything DiSC	<ul style="list-style-type: none">✔ More memorable & engaging language (colours vs letters).✔ People recall Insights “colour energies” more easily than DiSC’s letters.✔ Feels more personal and holistic (preferences + behaviour), not just behaviour.✔ Stronger focus on Jungian psychology foundation.
Hogan Assessments	<ul style="list-style-type: none">✔ More user-friendly, less “clinical”.✔ Hogan is powerful but heavy and often feels like an “assessment for HR/psychologists”.✔ Insights is highly accessible, engaging and energising for broad audiences.✔ Better for culture change and team workshops.
CliftonStrengths	<ul style="list-style-type: none">✔ More balanced view of people.✔ CliftonStrengths ignores weaknesses/conflict.✔ Insights helps teams understand both strengths and potential blind spots, making it more actionable for team dynamics and conflict resolution.
Franklin Covey	<ul style="list-style-type: none">✔ More personalisation & self-awareness.✔ Covey frameworks are powerful but generic: “Universal habits.” Insights Discovery adds a tailored, evidence-based personal profile that makes behaviour change more relevant and actionable for each individual and team.✔ Together they can complement, but Insights gives the “why I behave this way” layer Covey lacks.

2 Position Insights Discovery

As learning and development gains greater visibility in the boardroom, the focus is shifting towards measurable business impact. Depending on the colour energies of the person you’re speaking to, they may find different business impacts compelling...

Cool Blue

- ✔ For every dollar spent, \$20.63 is returned*
- ✔ Increased discretionary effort from employees
- ✔ Decreased absences

Fiery Red

- ✔ Streamlined time to proficiency savings*
- ✔ Better strategic alignment
- ✔ Faster and better decision-making

Earth Green

- ✔ Less conflict and change resistance
- ✔ Stronger relationship building
- ✔ A sense of understanding and belonging

Sunshine Yellow

- ✔ Stronger collaboration
- ✔ Improved communication
- ✔ Breakthrough innovation savings*

*These outcomes were proven in the 2023 ROI Impact Report, an L5-level impact study that explored the tangible ROI of Insights Discovery at Indeed.

Tip: Prepare a short case study deck (even anonymised from your prior company) showing measurable results.

How Insights can help you directly:

Check the database of case studies on the Insights website for examples from your industry.
www.insights.com/case-studies

3 Secure executive sponsorship

Frame Insights as a strategic tool for team effectiveness, leadership development and change, not just “personality colours”.

Tie it to organisational priorities (e.g. hybrid working, change management, employee engagement, and etc). If you have a case study or two to support that priority, that’s a strong combination.

Don’t forget to share the profile...

The most powerful selling tool Insights has is the Insights Discovery profile. A complimentary profile given to the right person is often all that’s needed to create champions willing to work with you to realise your vision.

How Insights can help you directly:

Reach out to us today to get a complimentary profile for your identified champion.

Stage 2: Pilot and demonstrate value

31–60 Days

4 Run a small pilot

- **Select a team.** Most pilots focus on executive leadership teams or boards, but any high-profile department is ideal.
- **Deliver an Insights Discovery workshop** + team wheel (new research suggests the team wheel is a massive driver of engagement)
- **Collect immediate feedback** and track outcomes (e.g. improved meeting dynamics, better cross-functional communication).

How Insights can help you directly:

Ask about Insights Impact Surveys and how they could help you showcase data that will impress your new executive team.



5 Promote early success stories

- **Translate anecdotal wins** into business-relevant outcomes. For example:

Smoother decision-making ➤ reduced time in meetings

Higher engagement ➤ increased discretionary effort

Less conflict ➤ better attendance and retention

Stage 3: Scale and embed

61–90 Days

Insights works because it's memorable. The impact is sustained over time, and the learning is practical and transformative.



This is where the real opportunity lies:

To spark lasting change, sustain the momentum of the workshop with long-term strategies to embed the learning.

6 Broaden adoption

- Offer additional workshops for managers and cross-functional teams.
- Start building a **network of internal champions** who use the Insights Discovery language of colour energies daily.

7 Integrate into HR processes

- Suggest using Insights in **onboarding**. It helps new hires understand their style and team dynamics.
- Showcase the robust learning journeys that are possible with Insights library of business-friendly L&D programmes. Everything from the onboarding mentioned in the bullet above to in-depth leadership programmes that transform how people lead and organisations achieve.
- Recommend change-focused programmes like **Thriving Through Change** as value-added initiatives that can meaningfully address productivity blockers like tension, conflict and change resistance.

8 Create a sustainability plan

- Develop an **internal communication campaign** (e.g. posters, intranet resources, quick guides on "working with different colour energies").
- Schedule **refresher sessions** and advanced modules (e.g. Discovering Sales Effectiveness, Self-Aware Leader).
- Position yourself as the **go-to facilitator** for team effectiveness using Insights.
- Support your learners and champions with visual cues like the **Insights Discovery colour blocks**.

How Insights can help you directly:

Insights has a library of new content that illustrates different learning journeys and organisational outcomes related to:

- ✓ **Personal effectiveness**
- ✓ **Culture change**
- ✓ **Team effectiveness**
- ✓ **Leadership development**

Wherever your career takes you, your Insights license is by your side

Once you join the Insights community, you're always part of it:
We've got your back and will make sure you have the same
opportunity to create impact and transformation wherever you go.



Did you know? When you move to a new organisation, your Insights license moves with you

Remind yourself of the benefits of your Insights license, and how you can apply them to create impact in your new role...

Enjoy the same trusted benefits

A snapshot of what's still included in your license

- Maintain your accreditation as a Client Practitioner and continue to access practitioner materials to deliver Insights products in your new organisation
- Enjoy developing your expertise through the Insights Connections platform. Access an extensive library of Insights learning content to support learners' development and reinforce your value to the organisation
- Engage with like-minded peers through the Insights Connections Community. Share ideas, interact with content and share best practices on the global forum
- Download virtual delivery kits to enhance the experience for your learners (six kits currently available)
- Refresh your Insights Discovery Personal Profile every year at no additional cost and explore up-to-date core Insights theory and new development pathways
- Access expert advice from our practitioner delivery team who can answer your questions about Insights Discovery and its application, right when you need it
- Stay on top of all things colour energies with the eNewsletter and learn new ways to leverage Insights in your new role
- Enjoy access to new Insights products like the Insights Discovery for Microsoft Teams app, new leadership profiles and updated programmes

Connections

A village of support for this new step in your journey

With powerful search and multilingual functionality, easily access facilitation content, no matter where you are in the world.

Client Partners receive unlimited access to:

✔ **Workshop resources to support your facilitation**

e.g. facilitator slides and coach notes. Factsheets, samples of workshop journals and recorded presentations on best practices.

✔ **Learning materials to enhance your workshops and keep the learning alive in your new organisation**

e.g. learning guides, activity sheets and participant kits.

✔ **Continuously updated marketing materials to support your learner community**

e.g. eBooks, case studies, popular social media posts, logos and brand support.

✔ **Regular Live Learning Workshops to engage with experts and other practitioners**

Immerse yourself in new applications of Insights Discovery and build your toolbox of best practices.

Friends in your corner

Every great partnership starts with a company that's got your back.

Get in touch to discuss:

- How to transfer your license
- New products and learning pathways
- Receiving complimentary profiles

Register your interest today

We regularly work with Client Practitioners like you who are managing a similar transition. We'd be happy to share those insights.