



# Preparing to Deliver Insights Discovery Practitioner Guide

*Name:* \_\_\_\_\_



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Logistics



If you need us,  
call us. We are  
absolutely here  
for you!

## Welcome

This document contains guidelines for creating and delivering an impactful Beginning the Journey workshop, where you facilitate participants through their first Insights Discovery experience. It is designed to support you on your journey as an Insights Discovery Practitioner. There are 'how to' instructions, tips, options and a selection of questions to ask.

### You matter

There is one essential ingredient missing in this guide – you! How you will take what is on these pages and bring the Insights Discovery system to life – creating an inspiring and meaningful experience for the people in the room – that is uniquely yours to create! It is no small task and we know you are up for the challenge. We're here to support your success.

This guide is intended to be comprehensive and work really well with how you prepare to deliver in the early stages. We are offering our suggestions because we believe they can aid your preparation. We also want you to facilitate this introduction from your own passion and conviction. The speaker notes are there to get you started and we encourage you to find your own words to bring the learning to life.

### *Day 2 - Agenda*

*Preparing to Deliver - Beginning the Journey*

*01 Getting Started*

*02 Perception*

*03 Colour Energies - Part 1*

*04 Colour Energies - Part 2*

*05 Jungian Preferences*

*06 Introducing the Profile*

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*Preparing Your Teachbacks*

## Ready, steady ... begin!

When the day has a light-hearted, relaxed and informal feel, we find facilitating this type of personal exploratory content much easier. Take a moment to make sure you're in the right zone before you start. If you've just fought your way through traffic, taken your dog to the vet and dropped off the dry-cleaning, you may need a moment or two to let go of all that so you can be fully present.

Chances are you have a room full of people looking forward to a change from their typical day-job, possibly a little (or a lot!) uncertain about what the day will hold – so you want to be at your best to make it a fun and enjoyable experience for them. When they're engaged, the learning will stick.

## Best Practice Agenda

The agenda on the next page is a great place to start. This agenda was created by a group of our own experts, who have delivered an introduction to Insights Discovery many times. We've built in their key learns, so you feel ready and confident with the plan you have.

This agenda gives the overall flow and handy references to the resources you will be using. Once you get familiar with this design, we encourage your creativity. Play with the agenda and amend it as necessary to ensure your workshops meet the needs of each group you work with.

The exercises cover the core pieces that you will need when introducing people to Insights Discovery. You might not do it all in one workshop so pick out the exercises that are most beneficial for your group.

The total running time for this agenda is 7 hours and 30 minutes. If you started your programme at 09:00, you would be complete by 16:30, including your 15 minute morning and afternoon breaks and a one hour lunch break.



## Best Practice Agenda

| Running time | Agenda item                                       | Slide  | Workshop journal | Key purpose and focus  | Duration |
|--------------|---|--------|------------------|--|----------|
| 00:00        | Getting Started                                   | 1      |                  |  | 25 min   |
|              | Welcome and Positioning                           | 2, 3   | -                | <ul style="list-style-type: none"> <li>Set the stage – it's about connections and relationships.</li> <li>Ask participants to 'pick their person', a relationship they want to improve</li> <li>Share the importance of attitude and approach to learning (child at play)</li> </ul> | 5 min    |
|              | Who am I? Activity                                | 4      | 3                | <ul style="list-style-type: none"> <li>Get participants interacting, learning something new about each other through the Who am I? activity</li> <li>Today, we'll keep asking the question 'Who am I?'</li> </ul>  | 10 min   |
|              | Steps to Personal Effectiveness                   | 5      | 4                | <ul style="list-style-type: none"> <li>Review four-step focus for the day</li> <li>Ask for additional objectives; write on flip chart.</li> </ul>  | 5 min    |
|              | Ground rules                                      | -      | -                | <ul style="list-style-type: none"> <li>Create the ground rules for the day on next flip chart.</li> </ul>  | 5 min    |
| 00:25        | Perception  |        |                  |  | 25 min   |
|              | Introduce concept of perception                   | 6      | 6                | <ul style="list-style-type: none"> <li>Click brings a blank page, next click reveals the slide title 'Perception'; Introduce perception, through a group discussion.</li> <li>Link their comments to key points about perception</li> </ul>  | 2 min    |
|              | Old Lady/Young Lady                               | 6      | 7                | <ul style="list-style-type: none"> <li>Click reveals quote and old lady/young lady image. Ask participants about the image – can they see both ladies?</li> <li>What's the story they have about each lady? How old? From where? Kind of life?</li> </ul>                            | 3 min    |
|              | Ladder of Perception                              | 7      | 8-11             | <ul style="list-style-type: none"> <li>Introduce ladder. Share an example.</li> <li>Have participants explore their own ladder experiences.</li> <li>Debrief and emphasise key learns.</li> </ul>  | 20 min   |
| 00:50        | Colour Energies: Part 1                           |        |                  |  | 35 min   |
|              | Insights Discovery Card Activity                  | 8      | -                | <ul style="list-style-type: none"> <li>Each person starts with three of each colour; trade cards (not colour for colour) to end up with cards 'like you'.</li> <li>Have participants share one statement</li> </ul>  | 15 min   |
|              | Adjectives Word Choice                            | 9, 10  | 12-13            | <ul style="list-style-type: none"> <li>Share adjectives exercise on screen; ask they complete in WSJ.</li> <li>Ask participants to write the words most resonating for them for each colour in quadrant image on page 14 of WSJ.</li> </ul>  | 5 min    |
|              | Describing the Colour Energies (Good Day/Bad Day) | 11     | 14               | <ul style="list-style-type: none"> <li>Use slide, bring colour energies to life (refer participants to the job aid in the WSJ).</li> <li>Explain good day characteristics then possible bad day characteristics</li> <li>Reinforce concepts of opposites and perception.</li> </ul>  | 12 min   |
|              | Your Colour Energy Mix                            | 12, 13 | 14               | <ul style="list-style-type: none"> <li>Reinforce we all have all four, just in different orders and different intensities.</li> <li>Ask participants to order their blocks from highest to least (or list the colour energies in order on page 14 of their WSJ).</li> </ul>          | 3 min    |
| 01:25        | Break   |        |                  |  | 15 min   |

## Insights Discovery Accreditation – Facilitation

| Running time | Agenda item   | Slide | Workshop journal                         | Key purpose and focus   | Duration |
|--------------|---|-------|--|---|----------|
| 01:40        | Colour Energies: Part 2   |       |  |   | 40 min   |
|              | Colour Energy Activity  | 14    | -  | <ul style="list-style-type: none"> <li>Participants go to flipchart of their perceived dominant energy and complete the task you assign the group.</li> <li>Have groups present back</li> <li>During debrief; highlight how colour energies are showing up</li> </ul>   | 20 min   |
|              | Using each colour energy  | 15-18 | FR – 17<br>SY – 19<br>EG – 21<br>CB – 23 | <ul style="list-style-type: none"> <li>Using the slides and the workshop journal pages, reflective exercise.</li> <li>Have participants write down how they have used each of the four colour energies.</li> </ul>  | 10 min   |
|              | Strengths and Frustrations                                      | 19    | -  | <ul style="list-style-type: none"> <li>Flip charts by colour in each corner.</li> <li>Round 1: Go to their perceived highest colour energy and articulate strengths. Consider benefit to the organisation.</li> <li>Round 2: Go to perceived lowest colour energy; identify the frustrations of using/working with. Also describe benefit.</li> <li>Debrief to ensure contributions of each of the four colour energies to the workplace are acknowledged.</li> </ul>   | 10 min   |
| 02:20        | Jungian Preferences   |       |  |   | 45 min   |
|              | Concept of Preference   | 20    | 25                                       | <ul style="list-style-type: none"> <li>Fold their arms and then fold them the other way (or write with dominant hand, then non-dominant hand)</li> </ul>  | 2 min    |
|              | Stepping Activity: Your 'Attitude' and Decision Making Function | 21-23 | 26-27                                    | <ul style="list-style-type: none"> <li>Have group line up facing the screen; read I/E statements.</li> <li>In debrief, highlight key points (we all can do both, just have a natural preference, perception is relative to where we are)</li> <li>Have group maintain their relative position, and turn and coming to the other axis (face wall to right of the screen).</li> <li>Repeat stepping exercise with decision making statements.</li> <li>Have participants identify the quadrant they ended up in.</li> <li>Summarise 'Attitude' preference with slide and page 26 of WSJ; then decision making Function with slide and page 27.</li> </ul> | 20 min   |
|              | Jungian Preferences and the Colour Energies                     | 24    | 29                                       | <ul style="list-style-type: none"> <li>Using slide animation, explain how the colour energies are formed through the combination of attitude and decision making function.</li> <li>Have participants plot their quadrant of page 29 of WSJ.</li> </ul>   | 3 min    |

## Insights Discovery Accreditation – Facilitation

| Running time | Agenda item   | Slide  | Workshop journal | Key purpose and focus   | Duration |
|--------------|---|--------|------------------|---|----------|
|              | Perceiving Function                                   | 25-29  | 30-31            | <ul style="list-style-type: none"> <li>• 'Write down what is there for you' and share image. Ask for examples. Use slide to explain Sensation vs Intuition.</li> <li>• Share S/N colour by colour energy slide, stopping after each quadrant to have participants reflect in their WSJ how they use S/N in each colour energy.</li> <li>• Give participants final opportunity before profile handed out to change their colour energy order they identified</li> </ul>  | 20 min   |
| 03:05        | Introducing the Insights Discovery Personal Profile   |        |                  |   | 25 min   |
|              | Overview and Face Validity                            | 30, 31 | 40-41            | <ul style="list-style-type: none"> <li>• Ask participants to read overview section and complete a face validity analysis</li> </ul>   | 15       |
|              | Graphs and Wheel                                      | 32, 33 | 44-45            | <ul style="list-style-type: none"> <li>• These graphs are from their responses to the evaluator</li> <li>• Use slide prompts to describe meaning of the conscious graph, the less conscious and the preference flow.</li> <li>• Colours above mid-line are inclined use; colours below the line are more reluctant use.</li> <li>• This is a measure of preference, not capability.</li> <li>• Wheel position (WP) determined by two factors; share basic quadrant lines and the three rings; discuss WP number.</li> <li>• No WP better than any other; all capable of effective colour use</li> </ul> | 10       |
|              | Lunch   |        |                  |   | 60 min   |
| 04:30        | Working with your Insights Discovery Personal Profile | 34     |                  |   | 55 min   |
|              | Strengths and Possible Weaknesses                     | -      | 42               | <ul style="list-style-type: none"> <li>• Have participants review the strengths and possible weaknesses pages of their Insights Discovery Profile</li> <li>• Ask participants to capture the top 2-3 statements from each in their WSJ, p 42</li> </ul>   | 5 min    |
|              | Effective Communication                               | -      | 43               | <ul style="list-style-type: none"> <li>• Ask participants to review communication dos and don'ts pages in their profile, and complete page 43 of the WSJ.</li> </ul>  | 5 min    |
|              | On the mat sharing                                    | 35-36  | -                | <ul style="list-style-type: none"> <li>• Ask participants to stand outside of their quadrant, close to their 'wheel spoke' if possible. Bring their blocks/profile/WSJ.</li> <li>• By topic, take turns sharing statements.</li> <li>• Ask group to identify colour energies in the statements.</li> <li>• Identify team wheel by asking participants to set their blocks or a sticky note with their name on it on their wheel position.</li> </ul>  | 30 min   |

## Insights Discovery Accreditation – Facilitation

| Running time | Agenda item                          | Slide     | Workshop journal | Key purpose and focus  | Duration      |
|--------------|--------------------------------------|-----------|------------------|--|---------------|
|              | Team Wheel Discussion                | 36        | 46               | <ul style="list-style-type: none"> <li>Discuss the energies and dynamics of this group.</li> <li>If not a team, discuss the idea that we are more than just our dominant colour energy; discuss dynamics of the day.</li> <li>If intact team, explore the dominant and inclined energy counts and discuss how well (or not) the team uses each colour energy</li> </ul>  | 15 min        |
| <b>05:25</b> | <b>Recognising Type</b>              |           |                  |  | <b>35 min</b> |
|              | Recognising clues                    | 37-39     | 34-39            | <ul style="list-style-type: none"> <li>Using the slides, discuss the idea of considering clusters of clues to recognise others' use of the colour energies.</li> </ul>   | 5 min         |
|              | Improving your relationship exercise | 40-43     | 38-39<br>32-33   | <ul style="list-style-type: none"> <li>Ask participants to think of the person they picked at the start, and their use of the colour energies. (WSJ pages 38-39).</li> <li>Walk through how to identify a person's eight type from highest and lowest colour energies (p 32 of WSJ).</li> <li>Looking at the WSJ chart on page 33, ask group to consider what they might do differently to better interact with the person.</li> <li>Discuss the benefits of plotting their own 'team wheel', and considering the dynamics.</li> </ul> | 15 min        |
|              | Colourful personalities              | 44        | -                | <ul style="list-style-type: none"> <li>Identify two to four 'famous' personalities</li> <li>Ask the group to explore that person's use of each of the colour energies and agree a possible order of their colour energies.</li> <li>Ask the group to identify their eight type.</li> </ul>   | 15 min        |
| <b>06:00</b> | <b>Break</b>                         |           |                  |  | <b>15 min</b> |
| <b>06:15</b> | <b>Adapting and Connecting</b>       |           |                  |  | <b>40 min</b> |
|              | Introduce Concept                    | -         | -                | <ul style="list-style-type: none"> <li>Adapt to connect; desire to improve connection; mindset</li> </ul>  | 5 min         |
|              | Adapting and Connecting exercise     | 45-50     | -                | <ul style="list-style-type: none"> <li>Run the knee-to-knee exercise, using influencing scenarios relevant to the group. Summarise with top tips by colour energy slide.</li> <li>OR have participants identify what they will do to better adapt and connect with the person they identified. Then have participants pair up and refine strategy through discussion.</li> </ul>   | 30 min        |
|              | Developing the skill                 | 51        | -                | <ul style="list-style-type: none"> <li>Have a discussion with your participants about the need to develop the skill and habit to successfully adapt and connect better with others.</li> <li>Reinforce all that we've learned today; know yourself, recognise the style of others, consider their need and actually making slight (or big) changes to your approach to better connect</li> </ul>   | 5 min         |
| <b>06:55</b> | <b>Action Planning and Close</b>     |           |                  |  | <b>35 min</b> |
|              | Goal-setting                         | 52        | 48-51            | <ul style="list-style-type: none"> <li>Have your participants reflect on what you have covered in the workshop and identify a goal or action they would like to achieve;</li> <li>Ask participants to first define the 'SMART' goal, and then take them through the G-WAVE process.</li> </ul>   | 10 min        |
|              | Action sharing                       | -         | -                | <ul style="list-style-type: none"> <li>Ask participants to share the action they have committed to.</li> <li>This can be particularly powerful in a team context.</li> </ul>   | 20 min        |
|              | Close                                | 53        | 52               | <ul style="list-style-type: none"> <li>Using the slide, review the four steps covered during the workshop, and check in on any objectives added by the group</li> </ul>  | 5 min         |
| <b>07:30</b> | <b>End</b>                           | <b>54</b> | <b>-</b>         |  |               |



# 01

# Getting Started

## Learning outcomes

1. Set expectations and context for the workshop
2. Get to know fellow participants
3. Create agreed rules of engagement

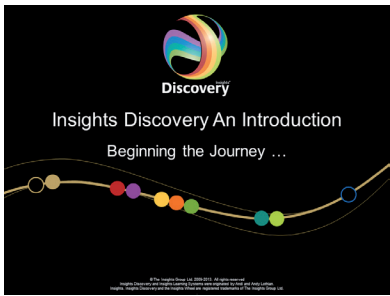
# Getting Started

## Welcome and positioning

### Why do this?

- To help your participants understand what the day is about and to create a little context.

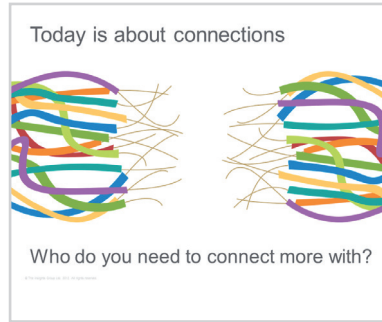
### How to do this



#### Beginning the Journey

Share with the group a little bit about you. Why are you here? Do you have a compelling (yet quick!) personal story about the impact of Insights Discovery that you want to share? Consider the kind of energy you are putting into the room and the expectations you are setting.

### Today is about connections



Insights Discovery and personal effectiveness are about connections – specifically improving them! Have you ever wanted to connect with someone, or needed to, and noticed that their different personal style can at times prevent you from establishing a good connection with them?



### With a little effort, we can make better connections more often.

Think about the key messages you want to share at the outset. Try using metaphors to position the key aims of the workshop. Some metaphors we suggest are:

Phones (what happens when there's a bad connection?).

Tower Bridge/Connecting bridges (If relationships are like a connecting bridge, how do we ensure we 'meet in the middle' and actually connect?).

What other metaphors might you use?

### Notes

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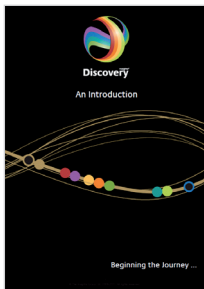
**‘Pick Your Person’**

An idea we know works really well is to have your participants turn to the first page, write their name in the book and then ‘pick their person’. Ask the participants to write down the name of someone in their life who they would like to improve their relationship with. Suggest they keep that individual in mind as they go throughout the day.

Then remind your participants the importance of their attitude as they approach their learning today. Using the ‘Child at play’ slide, discuss how young children approach learning new skills, and ask how that might help us today.

**Resources**

If you haven’t handed out the workshop journals, do this here and orient people to these. Encourage them to capture notes throughout and make the journal their own.



**WORKSHOP JOURNAL**



**Notes**

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## “Who Am I?” Activity

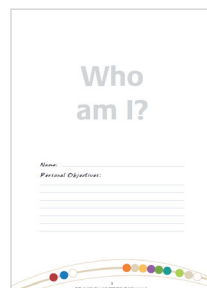
### Why do this?

- It makes the first exercise of the workshop engaging, thought-provoking and aligned to the first step on the journey of self-understanding, i.e. how do I view myself?
- It encourages participants to think more broadly about who they are and how they define themselves.

### How to run it

#### Who am I?

Show the slide with the question, “Who am I?” Ask participants to complete the sentence, “I am ...” noting down between 10-20 responses in their journal, on the first page around the ‘Who Am I?’ question. On completion, invite them to circulate and introduce themselves to as many of the group as time allows, using a different answer with each person they speak to. This is a high energy activity, and creates a buzz in the room right away.



WORKSHOP  
JOURNAL



Once the time you provided has elapsed, ask the group some questions:

How easy or difficult did you find it to do this?

Did you write more about your roles or your personal qualities?

What did you notice about how other people chose to define themselves?

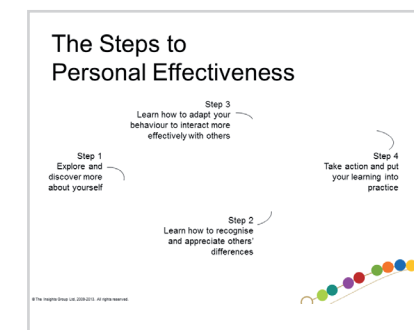
Were you more comfortable introducing yourself to others with certain words and phrases but less with others?

Wrap up the exercise by sharing, “this exercise is a little like what we will be doing for the rest of today, we’ll keep asking the question ‘who am I?’”

### The Steps to Personal Effectiveness

As you complete the ‘Who Am I?’ activity, move to this slide to share the four steps to personal effectiveness, and that we will be taking each of these steps in this process. These are essentially the objectives for the day.

Ask participants if they have any additional objectives for the session. Capture these on a flip chart and post on the wall. You can refer back to these in your close.



## Set Ground Rules



### Why do this?

- Creating a shared set of 'rules' for how the group will operate during the workshop provides clarity to the participants and gives you permission, as the facilitator, to gently reinforce these if needed.
- Your ground rules can encourage cooperation and mutual respect, and might relieve some anxiety individuals may be feeling about sharing openly.

### How to run it

We would encourage you to have a few ground rules already written on the flip chart (though you can start with a blank sheet if you like and write them real time in the room).

Some suggestions of 'rules' we like:

#### Participation

- Ask questions
- Share experiences

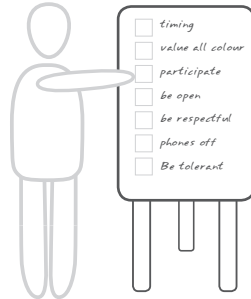
#### Respectful listening

#### Confidentiality

#### Cell phones/Blackberries

#### Have some fun!

As suggestions come up, facilitate the group to agreement and conclusion. Capture the 3-5 ground rules on the flip chart. Aim to keep this light-hearted but with the clear intent of respecting what has been agreed.



Are you happy with these ground rules?

Are there any that you would like to challenge?

Are there any other ground rules you would like to add?

### Notes

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# 02

# Perception

## Learning outcomes

1. Appreciate that our perceptions can be different from those of others
2. Understand how perceptions are formed
3. Awareness of how judgements about different views can be the source of misunderstanding and challenges in relationships
4. Awareness of how our perceptions can be changed

## Introduction to Perception

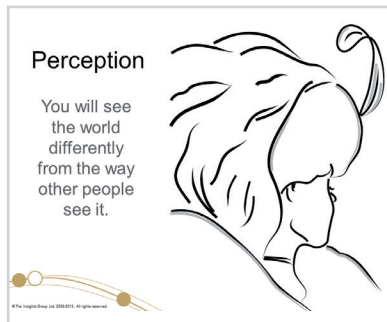
### Why do this?

- Your participants need to understand the nature of perception and its importance in the quality of our relationships with others.
- A key learn your participants need to take away is how people can experience the same event as someone else and respond very differently.

### How to run it

#### Perception

Using an object in the room, like a half full glass of water, ask participants: “is this half full or half empty?” Some will answer half full, some half empty, some may even say ‘always full’, and technically the glass is always full, as it is filled with air and water. And, this is the nature of perception: we can experience the same situation and react very differently. Show the young lady/old lady slide, and ask participants to turn to the image of the old lady/young lady on page 7 in their workshop journal.



WORKSHOP JOURNAL



Can everyone see two different ladies in the image? How difficult is it for you to see the other image? What does it take to shift your perception?

How old is the lady in the image? What's her story? What's her life like? What about the young lady? What is her life like?

Move your questioning to build on the key learns that impact the participants' experiences in life:

When have you experienced a situation where you saw things one way and someone else saw them very differently? What was the impact of this? How did you resolve your differences?

How can you overcome any biases in your perception?

As the group share their responses, highlight some of the key learning that comes from this type of exercise.

### Key learning

It is through perception that we understand and make sense of the world around us.

Once the mind sees things one way, it can be difficult to see them another way.

If the data we perceive is incomplete, we 'fill in the gaps' in our mind to enable us to make sense of what we see.

The mind may also distort what we see in order to fit in with our current understanding.

Different ways of seeing things are not right or wrong – they are just different perceptions.

Perceptions impact how we respond to our colleagues, our friends, and our family.



### Ladder of Perception

#### Why do this?

- So your participants can appreciate one model of how perceptions are formed and how this impacts our behaviour.

#### How to run it

Introduce the Ladder of Perception (this is derived from Chris Argyris' Ladder of Inference) and use a personal example to demonstrate the process of going up each rung of the ladder.

Write your personal example here:

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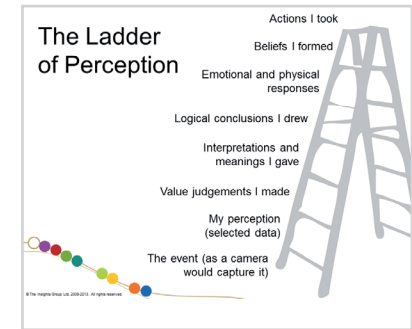
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Working in pairs, ask the participants to discuss a personal example and write down their steps in their workshop journal on pages 10 and 11.

The image shows two pages from a workshop journal. The left page (page 10) features a large, faint ladder graphic in the background. The right page (page 11) also features a large, faint ladder graphic. Both pages have writing prompts and lined spaces for notes.

*Think of an experience you have had recently and write down what occurred for you relating to each rung of your ladder.*

*The experience*

*My perception of it*

*Value judgements I made*

*Interpretations and meanings I gave*

*Logical conclusions I drew*

*Emotional and physical responses I had*

*Beliefs I formed*

*Actions I took*

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Which steps did you find easiest to answer and which were most difficult?

Which do you tend to jump to and which do you miss out?

(These two questions can help participants identify which aspects of their psychological processes they are most conscious of and which they are less conscious of.)

Which steps are typically positive/supportive in your processing and which are negative/destructive?

Which step(s) if perceived differently would have the most impact on your response?



**TIP:** If the participants already have knowledge of the Jungian functions, show the links between some of the steps on the ladder and the Jungian functions:

My perception of the data – SENSATION; Value judgements I made – FEELING; Interpretations and meanings I gave – INTUITION; Logical conclusions I drew – THINKING.

Just be sure all participants are aware of these concepts before going down this path; if they're not, you can come back to this learning point once you have introduced preferences.



Practitioner tips on Perception

| Do   | Don't  |
|--|--|
| Focus on the concept of individual perceptions of the world. We each see the world in our own way.     | Allow participants to criticise one view over another – encourage acceptance of all views.                         |
| Talk about how we CAN change our perceptions.  | Show more than two or three images. You can lose the key learns and become fixated on solving the picture puzzles. |
| The more open we are to others' perceptions, the more likely we are to make a better connection.       |  |
| Link the experience and the power of perception to the workplace (through your stories, and examples). |  |
|                       |                                  |

Why not ...

Share 'The Cookie Thief' poem by Valerie Cox if you're looking for something different. You could also weave this into the ladder discussion.

**The Cookie Thief**

A woman was waiting at an airport one night  
 with several long hours before her flight  
 she hunted around for a book in the airport shop  
 bought a bag of cookies, and found a place to drop  
 She was engrossed in her book, but happened to see  
 that the man beside her, as bold as can be  
 grabbed a cookie or two from the bag in between  
 which she tried to ignore to avoid a scene  
 She munched cookies and watched the clock  
 as this gutsy cookie thief diminished her stock  
 she was getting more irritated as the minutes ticked by  
 thinking if I wasn't so nice, I'd blacken his eye  
 With each cookie she took, he took one too  
 and when only one was left she wondered what he'd do  
 But with a smile on his face, and a nervous laugh  
 he took the last cookie and broke it in half  
 He offered her half as he ate the other  
 She snatched it from him and thought 'Oh brother'  
 This guy has some nerve, and is also rude  
 he didn't even show any gratitude  
 She'd never known when she had been so galled  
 and sighed with relief when her flight was called  
 She gathered her belongings and headed to the gate  
 Refusing to look back at the thieving ingrate  
 She boarded the plane and sank in her seat  
 then saw her book, which was almost complete  
 As she reached in her bag she gasped with surprise  
 There was her bag of cookies in front of her eyes!  
 If mine are here she moaned with despair  
 Then the others were his, and he'd tried to share  
 Too late to apologise, she realised with grief  
 That she was the rude one, the ingrate, the thief.

# 03

# Colour Energies – Part 1

## Learning outcomes

1. Your dominant colour energies are a filter for how you perceive the world, the people in it and your relationship to them.
2. Have an understanding of the four colour energies (needs, drivers and motivations of each energy) and how these energies can impact others both positively and negatively.
3. Appreciation for the dynamic nature of the opposite energies.
4. Awareness of respectful use of the common language (e.g. valuing/honouring/inclusion vs. labelling/stereotyping/isolating).

## Insights Discovery Card Activity

### Why do it?

- It gets people up, interacting and thinking about how they would describe themselves
- This is an easy way in to begin defining the qualities relating to each colour energy



### How to run it

Set out four piles of cards (one pile for each colour) and ask participants to select three of each (there are enough cards in the box for a group size of up to 18). Ask them to read the statements, keep the cards that describe them well and embark on a card swapping exercise with others. As they walk round the room exchanging cards with each other, the giver says why they think this card describes the receiver and the receiver chooses whether or not to accept the card, giving an explanation. If there are cards that no-one in the room wants to accept, they are returned to the facilitator. The returned cards may be representative of the least used colour energies or qualities that are missing in this group – or misperceptions! Hold on to these cards and use them to reinforce learning later in the session.

Close the exercise by having participants return to their seats, and identify the card they feel is most descriptive of their style. Have all participants hold up the cards; you might want to point out the variety (or not) of colours represented. If time permits, have each person read their statement on the card.

- 15
- How many cards of each colour do you have?
  - Which card stands out as most like you?
  - Was there a theme in the colour of cards that others offered you?
  - Which colour of cards were you most keen to give away?
  - Which card(s) were you most surprised to receive?
  - Which card(s) were you offered but didn't take? Why?

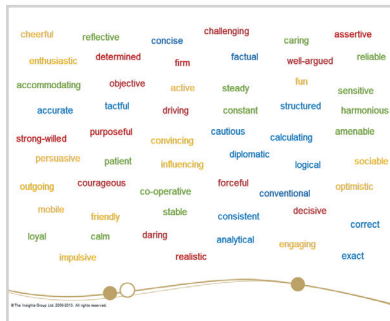
### Practitioner tips for the Card Game

| Do  | Don't  |
|---|--|
| <p>Watch for examples from within the group of the colour energies coming alive during the process and use these examples when you explain the colours.</p> <p>Pay attention to any cards that cause a reaction; link back to perception.</p> <div style="text-align: right; font-size: 2em;">👍</div> | <p>Worry too much about whether or not people's cards will align to their profile.</p> <p>Interrupt the participants too much; mostly observe, and then use your observations to emphasise the learning.</p> <div style="text-align: right; font-size: 2em;">👎</div> |

**Why not ... Do a feedback only exercise** – in a team, participants do not keep any cards themselves but instead give them away to their team mates.

**Where the participants don't know each other** – ask them to offer cards to each other based on first impressions. In the debrief, discuss how they made their initial assessments and how accurate they were.

## Adjectives word choice



## Why do this?

- To begin having participants consider the words they use to describe themselves
- To provide the first reveal of words that link to the Colour Energies

## How to run it

Referring to the words on the screen, ask participants to consider how they describe themselves; what words would they choose? Progress the slide to slide 9, and show how each of these adjectives relates to colour energies. Ask participants to look at the list of words on page 12 of the workshop journal and circle the ones that they feel most accurately describe them. They then count up how many words of each colour they have circled and note the scores at the bottom of the page.

**Option** – They may also put a cross through the words that they feel definitely do not describe them and count up the number of crosses in each colour.

On page 13, ask participants to list any additional characteristics they would use to describe themselves. Suggest they refer to what they wrote about themselves in the opening “Who am I?” activity (3-5 minutes here).

Remember you are starting to help participants find the ways they personally relate to each colour energy. The words they pick are part of their connection and how each energy is expressed by them – and it will likely be different from what their colleague is picking.



## WORKSHOP JOURNAL

## Describing the colour energies

### The Colour Energies on a Good Day



**TIP:** Introducing each colour energy is a big opportunity for you as a facilitator; if you can use respectful language, provide a balanced view of each colour energy and give equal air time to the good and bad of each colour, you'll increase the group's understanding – and help your participants find their style through your descriptions. This is pretty

important! Bring the colour energies to life, both in the words you choose, and how you might demonstrate the energy as you describe it. Remember to walk the fine balance of demonstrating, without over-simplifying or making colour energy caricatures.

In the following section we've provided you with possible speaker notes that will take you through one way we might introduce both the good day and bad day characteristics of all the colour energies. We really encourage you to practise the delivery of this, make this something you are comfortable doing, and expand your descriptive repertoire – there are more places to expand your knowledge of how to describe each colour energy, like the colours section in the Insights Discovery Theory Practitioner Guide, on Connections, speaking with fellow practitioners, or anyone at Insights.

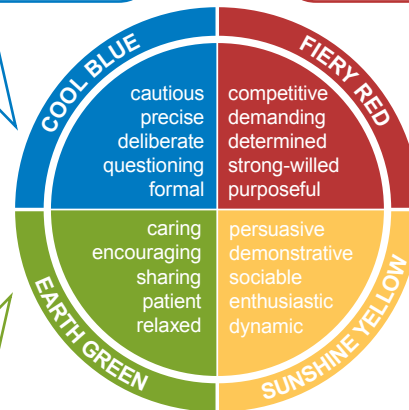


### Why do this?

- This is when you lay the foundational understanding of each colour energy.
- The opportunity here is to really emphasise the strengths and weaknesses of each colour energy.
- The whole time you are introducing colour energies, your participants are thinking about their own style, and the styles of people they know. This is key learning for the day!
- How you share the colour energies here will play a larger part in how your participants will go forward with them. If you use respectful language, they are much more likely to do the same.

**Cool Blue Energy** Cool Blue energy is a questioning, observant and analytical energy. When someone is showing a high preference for Cool Blue energy, they will likely seek to understand first, preferring to lay out all the relevant facts or assess the possibilities before making a decision. Cool Blue energy likes to be well-prepared, preferring to do some thinking in advance before having to share their ideas with others. You might often hear someone with a lot of Cool Blue energy saying, “I would like some time to think about that before I answer.” The motto on the Cool Blue block is ‘Give me the details’.

**Fiery Red Energy** Fiery Red energy is decisive, action-oriented, bold and results-focused. When people are using a lot of Fiery Red energy, they like things to move at a fast pace with a vision or a plan identified to make progress. No aimless wandering here! You might often hear someone with a lot of Fiery Red energy asking “so what?” or “what’s next?” and they may not even be asking, they might be telling. As you can see on your block, a motto for Fiery Red energy might be ‘Be bright, be brief, be gone’.



**Earth Green Energy** Earth Green energy is a calming, nurturing, supportive energy. When people are using a lot of Earth Green energy, they deeply listen to and care about the individual and their experience. Earth Green energy values each individual, and is accommodating of others. Where Sunshine Yellow energy is a one-to-many relationship expert, Earth Green energy is a one-to-one relationship expert. How values are lived and upheld is of great importance. It is a quieter energy, enjoying the depth of relationship with a select few. On the blocks you can see the motto for Earth Green is ‘Show me you care’.

**Sunshine Yellow Energy** Sunshine Yellow energy is an outgoing, sociable, dynamic energy. When people are using a lot of Sunshine Yellow energy, they appear friendly, persuasive, and animated. They are concerned with the group dynamic and like to ensure everyone is included. You will often hear someone with a lot of Sunshine Yellow energy because typically, they like to be speaking! Talkative, demonstrative and enthusiastic, Sunshine Yellow energy likes to be in the thick of things. On your block, you can see the motto for Sunshine Yellow energy is ‘Involve Me’.

### The Colour Energies on a Bad Day

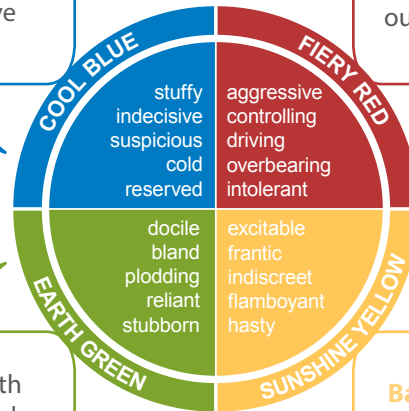
Much like two sides to a coin, there is another side to each of the colour energies. The gifts of each, when overused, can become a weakness. Let's look at the 'bad day' characteristics of the colour energies, or how these colours may show up in a less refined way.

Be sure to emphasise as you describe each colour energy's bad day, that it may be that the individual showing up with bad day Cool Blue/Fiery Red/Sunshine Yellow/Earth Green energy is actually having a bad day, OR it may be that the person perceiving that individual, experiences it as bad day. This can be particularly likely when the energy an individual is expressing is the least preferred energy of the person perceiving.



**Bad Day Cool Blue Energy** (Click the slide for ‘bad day’ Cool Blue descriptors.) Normally observant, calm, collected and questioning, on a bad day Cool Blue energy may be perceived as nit-picking or indecisive, even suspicious. They may come across as stuffy or cold. Why might this be happening? Cool Blue energy wants to have the right information on hand and the time to consider the best solution or answer. If they perceive they are being rushed to make a decision or forced to make a choice without the information they need, this can be uncomfortable. It is likely to cause a natural resistance seen as either a withdrawing or a level of questioning that could be perceived as nit-picking or focused on inconsequential detail. Who is most likely to see the negative aspects of Cool Blue energy? (Sunshine Yellow.)

**Bad Day Fiery Red Energy** (Click the slide to see the ‘bad day’ Fiery Red words show up.) The bold, decisive, action oriented energy, when turned up too loud, may appear to others as overly demanding, impatient, intolerant or even arrogant. Fiery Red energy is about getting results, getting things done. If things appear to be spiralling out of control, Fiery Red energy may respond by dialling up the use of their own Fiery Red energy to make whatever needs to happen, happen better and faster. What colour energy do you think is most inclined to see the more negative aspects of Fiery Red energy? (Answer Earth Green.) This is because Fiery Red and Earth Green energy are opposites. That which we don’t understand in ourselves, we tend not to understand in another.



**Bad Day Earth Green Energy** (Click the slide for ‘bad day’ Earth Green descriptors.) The normally caring, supportive, patient style of the Earth Green energy, on a bad day, can come across as plodding, bland, stubborn, or reliant. What is often happening is something of great importance is being devalued, and, unlike Sunshine Yellow energy that gets a little vocal, Earth Green energy may become quietly resistant. People with a strong preference for Earth Green energy prefer a democratic approach, and so are likely to avoid confrontation. In order to keep the peace, the Earth Green energy can appear docile, though they likely have very strong opinions about the way things should go. Which energy might view this behaviour as ‘bad day’ most often? (Fiery Red.)

**Bad Day Sunshine Yellow Energy** (Click the slide for ‘bad day’ Sunshine Yellow descriptors.) Let’s look at Sunshine Yellow energy; on a good day this energy is dynamic, outgoing, friendly and sociable. On a bad day, this energy can appear frantic, scattered, indiscreet and hasty. Sunshine Yellow energy thrives on involvement and acknowledgement, and if in some way they are being excluded, or something of importance (in their view) is being excluded, they might turn up the volume on their Sunshine Yellow energy, and come across as excitable and OTT (over-the-top!). Which energy is most likely to see the less than positive traits of Sunshine Yellow energy? (Cool Blue.)

## Your colour energy mix



Once you have described both the good day and bad day characteristics of the colour energies, ask the participants to see if they can link the characteristics they wrote on page 13 with the colour energies. These can be recorded in the relevant quadrant on the graphic on page 14. Using this, plus their selected words from page 12, they should be able to rate their perceived use of the colours and record this on page 14.

### Notes

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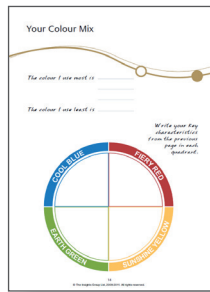
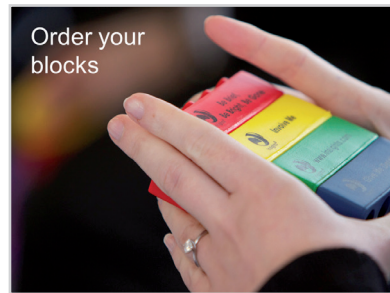
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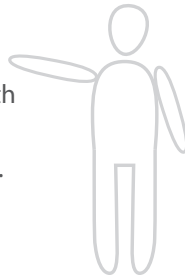
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WORKSHOP JOURNAL

**TIP:** Once they sort their colour blocks, ask participants to share with the room their current perception of their style.



In the flow of the workshop agenda, you are scheduled to take a 15 minute break here.

# 04

# Colour Energies – Part 2

## Learning outcomes

1. Experience how colour energy preferences show up in others.
2. Have an individualised awareness of their relationship to each of the four colour energies (how does this energy come through you?).
3. Appreciate your unique combination of your own energies.

## Colour energy activity: Team celebration

### Why do this?

- While it may seem contradictory to say that we all have all four colour energies, and then begin with an exercise that separates participants into their dominant colour groups, it is important to give participants a chance to deepen their understanding of their dominant energy in a playful way.
- We do not want to inadvertently send a message that because we all have all four colour energies, we are all the same. The power of the model comes through both the appreciation of the differences and acknowledging where we are similar.



**Colour Energy Exercise  
'A Team Celebration'**



Split into dominant colour groups.  
Take responsibility for organising a 'team celebration'. The only requirement is that you must ensure it is successful.  
You have five minutes to create a presentation of your ideas.

### Caution!

This is often a time when participants will use strong labelling language. Be on the lookout and be ready to offer a kind correction on how to speak about the colour energies. For instance, they should not talk about 'Blue people' or 'Yellow people', or say things like, 'Greens always ...', 'Reds are so ...', etc.

### How to run it

Split the participants into four groups according to their dominant colour energy. Ask each group to plan a team celebration; the only requirement is that they must ensure it is successful. Give them three minutes to come up with a presentation of their ideas on a flip chart before presenting back to the whole group.

Take time to debrief this exercise – the key learning for participants is in observing the interactions, thinking processes and presentation. It is an ideal opportunity for them to recognise how the colour energies show up in action. As the facilitator, you play a key role in helping the group notice some of the key differences between the colour energies.

**TIP:** Watch for the colours – they will come to life for you!  
Do not be afraid to play with the group and highlight some of the funny ways you saw the colour energies coming to life. Did the dominant Fiery Red group finish first and ask you when the exercise was done? Did the dominant Earth Green group all face each other and take time to hear out each person's input? Was it just a bunch of talking and laughing at the dominant Sunshine Yellow chart? And did the dominant Cool Blue group approach the task with more quiet consideration?



Within your group, what did you notice about your interaction?

What were your key concerns in planning the celebration?

How did you make decisions?

What did you notice about other groups' presentations?

Did any of the other groups consider things that your group didn't think about?

What other colour energies did you see at play in the groups other than their dominant?

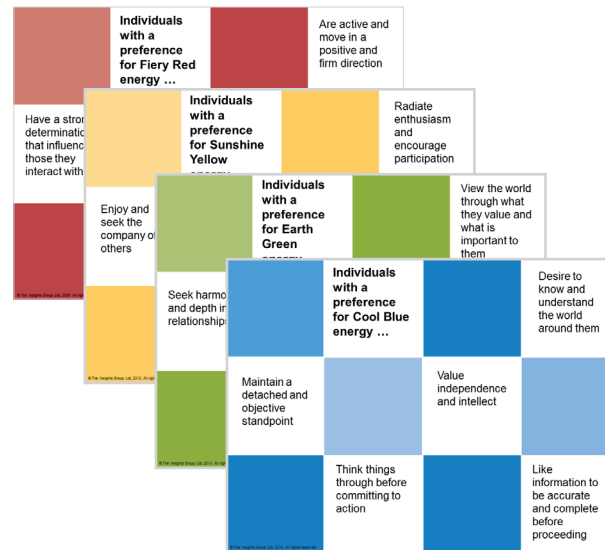
## Using each colour energy

### Why do this?

- It helps participants appreciate how they already have used each of the colour energies.
- It really makes the point that we all have access to all four colour energies.

### How to run it

- You will have participants work through pages 16-23 of the workshop journal. Starting with Fiery Red energy, ask participants to consider, and capture in their workshop journal, when they have effectively used Fiery Red energy. Remind them for some people this will be easier to do as Fiery Red energy is an energy they are more inclined to use, and for some it may be more difficult as they may be more reluctant in using it. Once you have given the group 2 or 3 minutes to think about using their Fiery Red energy, ask if anyone is willing to share what they wrote. Listen to what they share and highlight where you hear the Fiery Red energy (or ask the group where they heard it).
- Then move on to each of the colour energies in turn, using the slides as your prompts, ensuring you spend equal time on all four colour energies.



**Option** – Instead of asking for a share at each colour energy, you can have participants complete all four colours at once, and then ask the participants to work in pairs, discussing where and when they typically use each colour energy – which they find easy to use and which they find more difficult.

Ask participants to put their blocks in their preferred order and discuss with a partner (who has a different order) how their preferences show up in this order.

**TIP:** If you didn't feel you heard any Fiery Red energy (or any colour energy!) being used in the example, ask the individual how they experienced it as Fiery Red energy. (Just be careful not to put the person on the spot with their new (possibly mistaken) knowledge!)



## Strengths and frustrations

### Why do this?

- The key aim of this exercise is to develop appreciation of the value of all four colour energies and to recognise any personal biases.



### How to run it

Split the participants into four groups by dominant colour energy. Ask each group to write on a flip chart what strengths they think their dominant colour energy brings. Discuss as a whole group and note down how their organisation could benefit from engaging more of this energy. Ask them to move to the flip chart of their lowest colour energy and, in their group, write what frustrates them about using or working with this colour energy. Again they consider and write on the flip how their business could benefit from using more of this colour energy.

**Colour Energy Summary**

**Strengths**



- Go to the flip chart of what you believe is your **most preferred** colour energy.
- Capture the **value** you believe this colour energy contributes.
- How could you/the business **benefit from more** of this colour energy?

**Frustrations**

- Go to the flip chart of what you believe is your **least preferred** colour energy.
- Capture what **frustrates** you about using or working with this colour energy.
- How could you/the business benefit from more of this colour energy?

To conclude the exercise, review all four flip charts for key points highlighting the gifts and possible liabilities of each colour energy, and when used well, what benefit it can bring. This is intended to be a fast paced review of the key points of the colour energies, and highlighting the strengths, and possible frustrations, of each.

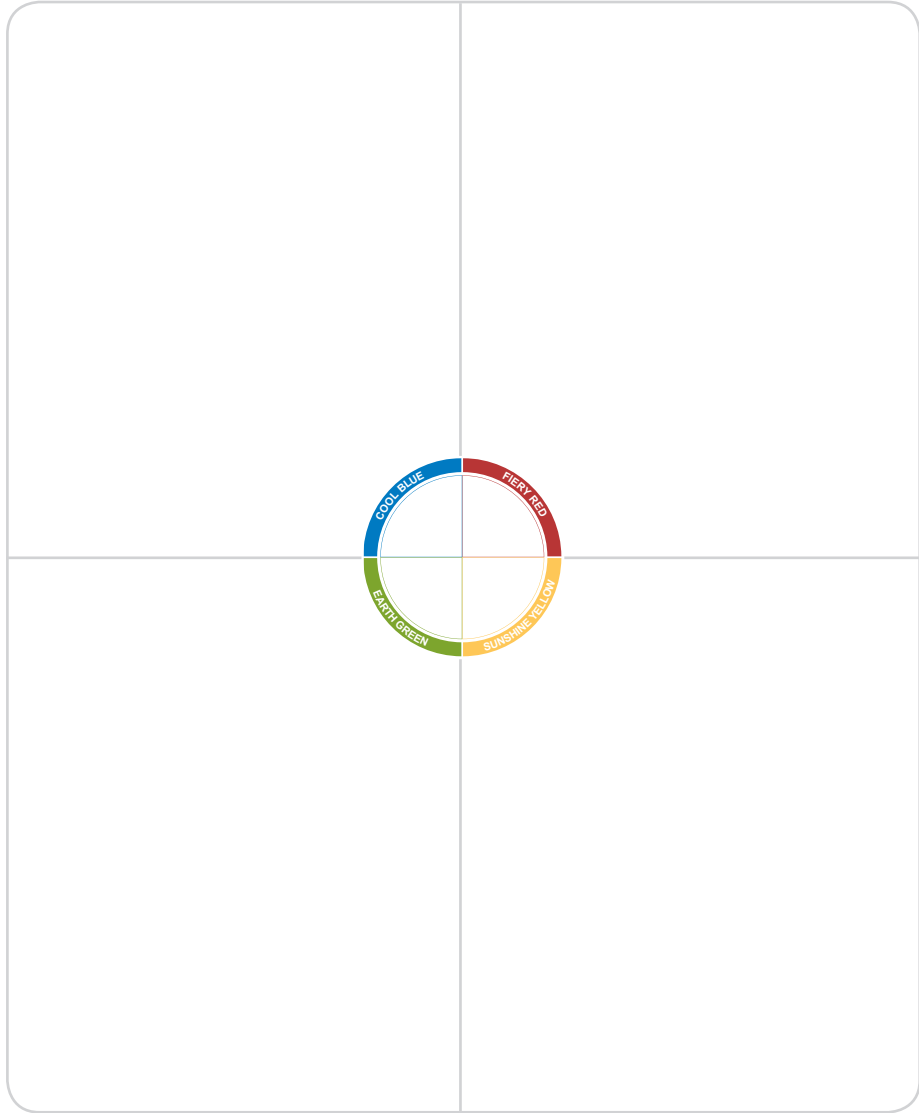
## Practitioner tips on the colour energies

| Do   | Don't  |
|--|--|
| Give equal air time to each of the colour energies.                                  | Show bias – positive or negative.  |
| Have fun.  | Impose your own views.   |
| Be yourself.   | Emphasise your colour energy over others.  |
| Use Insights Discovery language.   | Let people get away with 'colour labelling'.   |
| Bring it alive with examples.  | Oversimplify the model by stopping the learning at people's dominant energy.         |
| Use the appropriate supporting materials – mat, blocks, hats.                        | Trivialise – use both 'simplicity and depth'.  |
|  | Skip important exercises or key learning points – plan your time well.               |
|  |  |

## Why not ...

Once you are comfortable with these exercises, take a look at the resources on Connections and find other fun ways to engage with the colour energies.

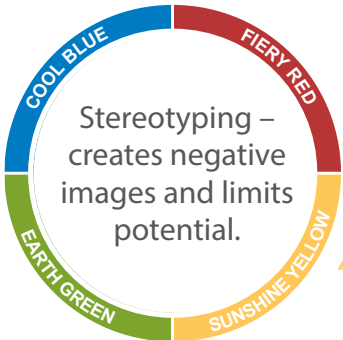
Colourful Vocabulary



Disrespectful use of language

“Blue people ...”

“Greens always ...”



“Reds are so ...”

“I am not a yellow ...”

Respectful use of language

“With my dominant blue energy ...”

“Thinking about this from a green energy perspective ...”



“Our preference for using red energy ...”

“When we draw on our yellow energy ...”

# 05

# Jungian Preferences

## Learning outcomes

1. Understand the Jungian attitude and functions, and how these relate to the four colour energies.
2. Create an awareness of your own preference for the attitude, and decision making and perceiving functions.
3. Create an awareness of how the perceiving functions are both present in all four colour energies.
4. Awareness that the attitude and functions each operate on a continuum, and we all operate within a range on that continuum.
5. Our strength of preference impacts our view of others (my perceptions of others are relative to where I am in my preference).



### Why do this?

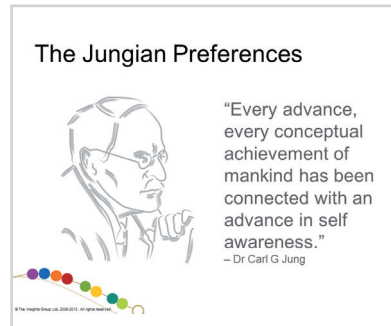
- To help participants become familiar with the concept of preference.



### How to run it

#### Introduction to Preferences

Ask the participants to fold their arms in their normal way and notice how it feels. Then ask them to cross their arms in the opposite way. For most people this feels a bit awkward and uncomfortable. Share with them, that if left in that position for a while, at some point we are all likely to flip our arms back to our normal or most comfortable preference. Link this to the idea of psychological preferences – we have a habitual way of responding; if asked to do things differently we are able to with conscious effort but it does not always feel comfortable. In time, without continuous conscious effort, we often go back to our usual preference.



### Stepping Activity: Your 'Attitude' and Decision Making Function



### Why do this?

- It helps participants better understand preferences and explore their own use of the preferences.

### How to run it

Start with the Attitudes – Introversion and Extraversion. Introduce the concept of I/E through the stepping exercise.

Participants line up one behind the other facing the front of the room. Have your co-facilitator (or steal a participant to help you with the exercise) stand on the participants' left, while you stand on the right. You will read the Extraversion statements and your partner will read the Introversion ones. Ask participants, as statements are read by either of you to take one small step towards the speaker, if the statement applies to them. If a statement does not describe them, they stay where they are.

Statements can be found on your practitioner job aid.



### The Decision Making Functions – Thinking and Feeling

Assuming everyone is facing the front of the room (we'll call it 'north'), ask the group to do a 90 degree clockwise turn and face the 'west' part of the room. Then have the group line up behind each other in a straight line (keeping the I/E relativity spectrum for the group intact). Then run the same exercise with Thinking and Feeling, using the statements on your Practitioner job aid.

In the same way, as you read a statement if participants agree with it, they take a step towards you. If they disagree, they stay where they are. This time you stand at the front of the room to read the Thinking statements and your partner stands at the back to read the Feeling statements. Now participants should be standing in the quadrant of their dominant energy.

### Key learns from the stepping exercise

It is likely that most of us stepped in both directions, though some may have a clearer preference than others. We all operate within a range of these preferences; at times more extraverted, at times more introverted.

We started in the middle; look at the spread of preference in the room.

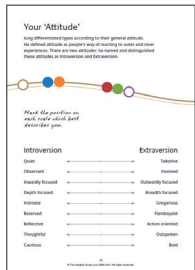
Preferences are relative; for those individuals who are claiming the most extraversion, when they experience anyone else in the room – even those who say they are extraverted – the most extraverted person may perceive them as being somewhat introverted.

Given you are trying to recreate the quadrants of the wheel, if you have set the exercise up correctly, those who have stepped towards extraversion, would be where the R/Y quadrants are, and those who have stepped towards introversion would be in the G/B quadrants.

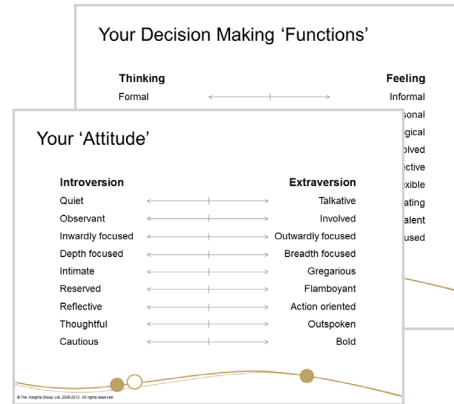


Ask the individuals to go back to their seats and workshop journals. Using the slides and the workshop journals do a quick recap of what was experienced in the stepping exercises.

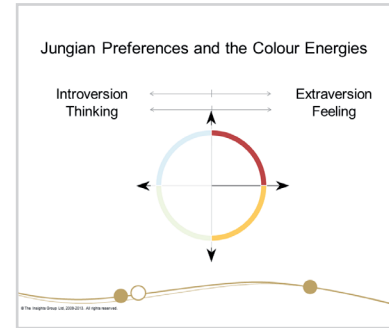
It is important to emphasise that our use of the preferences is on a continuum rather than being an either/or choice.



WORKSHOP JOURNAL



### Jungian Preferences and the Colour Energies



On completion of the preference scales on pages 26 and 27 of the workshop journal, ask participants to rate overall where they would assess themselves for Introversion, Extraversion, Thinking and Feeling. These scores can be plotted on the small wheel in the centre of page 29.

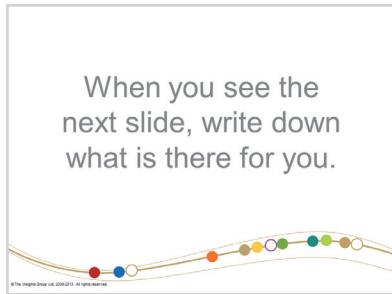
Now show how these two pairs of preferences combine to form the basic characteristics of the four colour energies (page 29). Use slide animation to summarise which colour energies share introversion, extraversion, thinking and feeling.

## The Perceiving Function

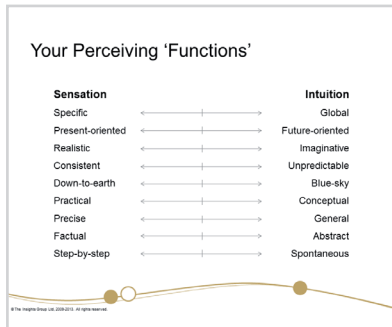
### Why do this?

- To help participants appreciate the perceiving functions of Sensation and Intuition
- To explore how Sensation and Intuition can show up in every colour energy

### How to run this



Show the slide image (or equivalent) and ask the participants to write down what is there for them. Volunteers share what they have written and write the key words and phrases on a flip. Those who describe exactly what is in the picture (i.e. colours, shapes, objects) are showing a stronger preference for Sensation whereas those who write interpretations of what they see are showing a preference for Intuition.

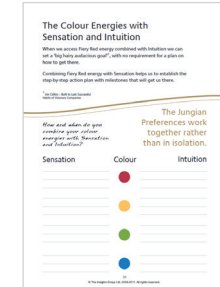


Using the slide, expand further on the differences between sensation and intuition.

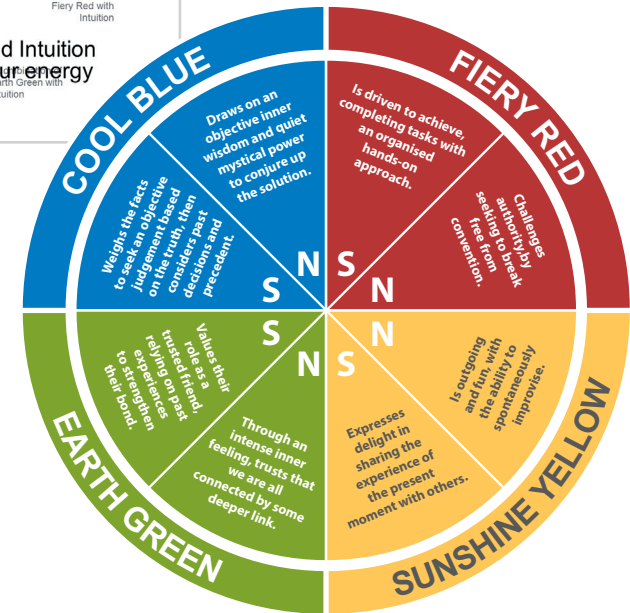
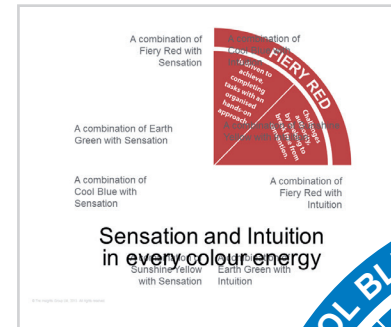
Ask participants to complete the self-assessment process on page 30 of the workshop journal.

## Exploring Sensation and Intuition through the Colour Energies

Using the slides with the two different statements for each colour energy, read out the statements and ask the participants to identify, for each colour energy, which statement is more sensation and which is more intuition. Remind the participants that sensation and intuition are present in every quadrant and reveal different flavours of each colour energy.



WORKSHOP JOURNAL



**Solidify their knowledge:** Ask the participants to work together in groups of four to complete the exercise on page 31, identifying how the perceiving functions combine with the colour energies. Review this exercise as a whole group and ask participants to share examples.

Which of the Jungian preferences do you tend to use most often?



Which do you rarely use and which do you over use? What impact does this have?

How does an awareness of these preferences help you to understand yourself and others?

Have participants confirm their colour order one more time before they receive their Insights Discovery Personal Profile.



**Practitioner tips on Preferences**

| Do  | Don't  |
|---|--|
| <p>Make sure participants experience their dominant preferences in a tangible way. The stepping exercise is very powerful for this. Remember to answer the 'so what?'</p> | <p>Expect all participants to understand the concepts the first time you share them. Allow them time to reflect and ask questions.</p> <p>Overwhelm them with your new-found knowledge; keep the session meaningful to them and their world.</p> |
|    |   |

# 06

# Introducing the Insights Discovery Personal Profile

## Learning outcomes

1. Create an appreciation for the accuracy of their own profile
2. Understand the key concepts of the graphs and wheel

# Introducing the Insights Discovery Personal Profile



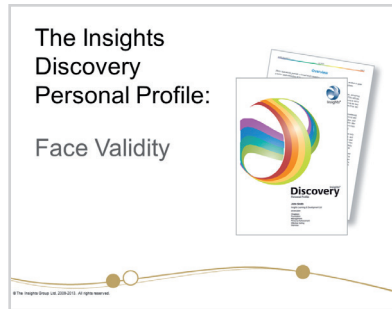
## Why do this?

- To develop deeper self-awareness and understanding through interacting with the Insights Discovery Personal Profile.

## How to run it

### Overview and Face Validity

Remind participants that this information is confidential; the content of the profile has not been shared with anyone else, and it is their choice who they share it with from here. Assure them that almost every participant, no matter how reticent in the beginning, after reading their profile can see great value in sharing the contents of their profile.



Taking a quick score tally round the room typically shows high face validity all round. If there is one person who has relatively low face validity (below 80%), it is worth exploring this with them one-on-one rather than getting into debate in front of the group. However, it is also important to come back to the group after your one-on-one discussion and report your findings.

## Bottle it

Note down your thoughts and feelings immediately after first reading the overview pages.

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Review the Overview (pages 6-8)

- Put stars \*\* next to any statements you believe are particularly accurate.
- Put a ? beside those statements you believe do not describe you. Rather than stick on a specific word, consider the whole or half sentence.
- Remember to seek feedback from someone you trust on any statements in your Profile which you are not certain describe you.

Count the sentences that did not describe you (?) and multiply by 2. Subtract that number from 100.  
 1.5 sentences x 2% = 3%  
 100% - 3% = 97% Accuracy



Invite the participants to read the Overview section. From the outset, it is important that each individual connects with their profile and feels fully engaged with it. Establishing trust in the content of the profile is an essential starting point. When people believe that the content of the profile is accurate for them, you have established 'face validity'.

Face validity is assessed on reading the Overview pages of the profile. As the participants read these pages they put a question mark (?) next to any statements that they are unsure about. They count these up, multiply by 2 and take away from 100 to get the percentage validity. Example – 1.5 multiplied by 2 is 3 then taken away from 100 is 97%. So the profile is deemed 97% accurate.

## Graphs and wheel

Once you have done the face validity, ask participants to turn to the graphs pages of the profile, and briefly explain how these graphs came to be.

### Conscious and Less Conscious

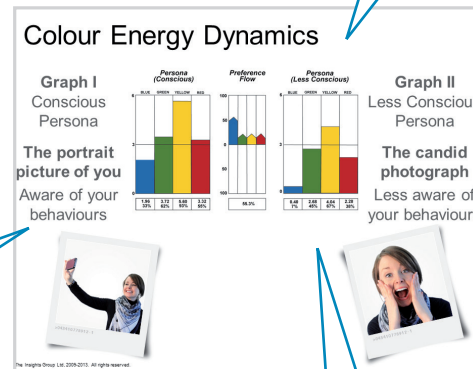


2

“The graph on the right is the less conscious graph, which was also derived from how you completed the evaluator, based on Jung’s theory of polar opposites. This is how the world might perceive you when you’re not consciously interacting with them. Your less-aware reactive style.”

1

“The conscious graph, on the left, is a direct result of how you completed the evaluator. This is how we want the world to perceive us when we’re conscious about our interactions. It indicates our chosen preferences for each of the colour energies.”



3

“Think of the photos you post on Facebook; you have chosen them and want to share them with your Facebook friends. It’s the ‘you’ you’re putting out there, your conscious graph. Now think about those photos you get tagged in; someone else is seeing you. You don’t choose these photos, the people you interact with do. When you first get tagged, you are not managing how the ‘Facebook’ world sees you. This is like your less conscious graph.”











# 07

# Using the Insights Discovery Personal Profile

## Learning outcomes

1. Identify specific statements in the profile that are particularly accurate and worth sharing.
2. Appreciate the different needs of the individuals in the room through the statements shared.
3. Appreciate the dynamic of the people in the room through the lens of the team wheel and the different preferences for the colour energies.

## Working with your Insights Discovery Personal Profile

### Why do this?

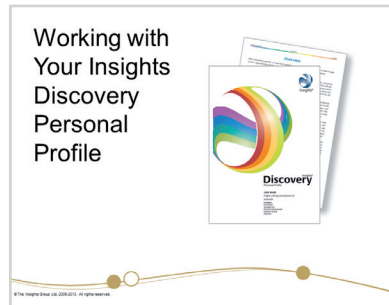
- There is so much rich information in the Profile, so encourage your participants to use it often and regularly after the session to continue their journey.

### How to run this section of the agenda:

Ask participants to order their blocks based on what they see in their Conscious graph.

### Strengths and Possible Weaknesses

Have participants review the strengths and possible weaknesses pages of their profile. Ask them to capture the top 2 or 3 statements from each page in their Workshop Journal, page 42.



## Effective Communication

- Following the instructions on the slide, have the group complete the exercise. For intact teams, capture the statements shared so you can provide these in a communication matrix after the session. For a group of individuals, have them share on the mat, and continue to reinforce the differences in the colour energies.
- Encourage the participants to commit to sharing the points that are most important to you with the people you interact most regularly with, e.g. team members and family members.



### On the mat sharing

Invite everyone to come to the mat with their blocks.

- By topic, take turns sharing statements. Ask the group to identify the colour energies in the statements.
- Identify the team wheel by asking participants to set their blocks (or a sticky note with their name on it) on their wheel position. If you're using the blocks, have them turn the blocks that are 'above the line'.



**TIP:** If you ask participants to send you the statements they shared (or you capture them on a flip chart), you can send out a team matrix after the workshop.

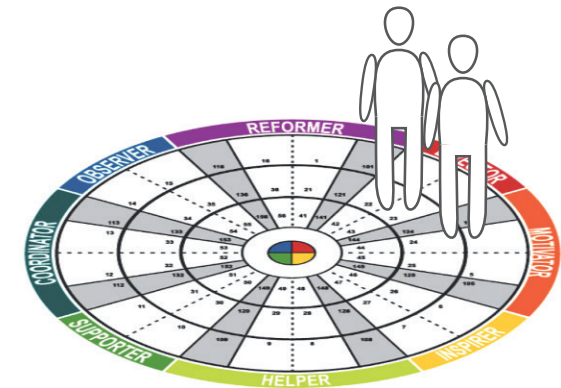


### Team Wheel Discussion

You might just want to facilitate a discussion about the blocks that people see on the mat (if you did this in the last exercise), or you might want to have the group have an experience of the different colour energies and the orders in the group. If that's the case, try this:



- i) Have them stand in the quadrant of their dominant colour energy and ask questions about what they notice:
  - for an intact team, ask who is next to them, who is opposite, etc.
  - for a group of individuals, ask them to reflect on when they have used this energy well, and even, when they look around at the rest of the participants, how does it align to what you have experienced of these people today?
- ii) Move to the quadrant of their second colour energy and ask similar questions; notice who is still opposite you, who stands in the same quadrant who wasn't before, and consider the implications of this.
- iii) Continue through all four colours so the group gets to experience how the group dynamics change with each rotation; get them to consider a time when they used the lower colour energies, and what it was like for them and those around them.



# 08

# Recognising Type

## Learning outcomes

1. Develop an awareness of the different clues or signals people demonstrate in their behaviours that highlight their preferences for the different colour energies.
2. Consider different people and how they use each of the four colour energies, and understand the importance of looking for the behavioural evidence.
3. Understand how to determine a person's likely eight-type position on the wheel through assessing your perception of their highest and lowest colour energies.
4. Begin to formulate how you might use this information to better connect with individuals who are different from you.



**Why do this?**

- When you understand the different styles of each of the colour energies, you can recognise these more quickly. The more effective your participants become in recognising people’s preferences, the more they will continue to use the language of Insights Discovery.
- This gives you the opportunity to help your participants explore how their own body language and behaviour may be influenced by their colour energy preferences.

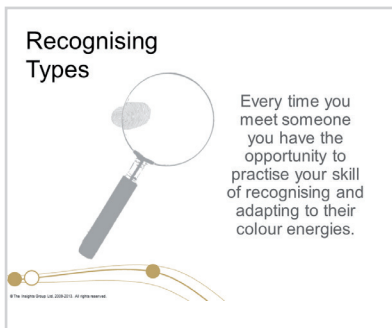
**How to run it**

Open a discussion on how you can recognise the colour energies in action encouraging ideas from the group about what they would look out for. Ask them to note down what they would expect to see for each of the colour energies.



**Searching for Clues**

Summarise what your group has said and share these four factors to consider when recognising someone else’s style. Encourage participants to go back to the basics – are they seeing more introversion or extraversion? Thinking (task focused) or Feeling (people focused)?



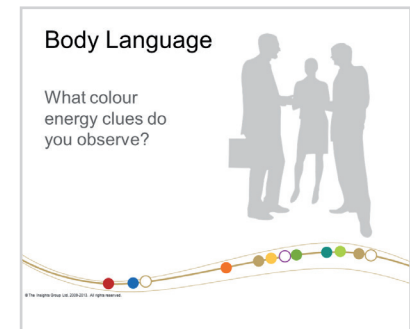
**Verbal Style (Workshop journal page 36)**

Discuss different aspects of verbal style. Ask participants to consider how they would rate themselves on the scales – Style, Tone, Pace and Volume. Discuss practical ways this information could be useful (e.g. when they are having a meeting over the phone, or if they primarily connect with their customers or stakeholders over the phone).



**Body Language**

It’s also important to consider clues from a person’s body language. Are they more formal or informal? Expressive or reserved? Watch for behaviours that really demonstrate a preference for the colour energies. Can you think of clues you might observe from body language?




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## Colourful Personalities Exercise

### Why do this?

- Whenever we learn a new skill, we need time to practise it. If we stay only at the theory, we run the risk of not actually changing behaviours back in the workplace.

### How to run it

Split the group into four, with each group at one flip chart. Ask each group to identify a well-known personality and write the name of that person on the flip. Ask them to create a quadrant on the flip, and label the four colour energies. Invite them to discuss and record examples of how they see this person using each colour energy. Ask the group to order the colour energies for that individual from highest to lowest. Then have the group determine their likely eight-type.

You can have the group select their own famous person (it could be someone within their organisation, like the CEO) or you could assign the famous person.

In the debrief, discuss the importance of trying to recognise someone else's style, focusing on what evidence they have to back up their view versus the need to be 'right' about someone's colour energy preferences.





How did you identify their dominant colour energy – what aspects of their behaviour made it clear to you?

How easy was it to identify their second colour energy?

How did you determine what their lowest colour energy was? What have you NOT seen in their behaviour that would indicate this?

### Practitioner tips for Recognising Type

| Do   | Don't   |
|--|---|
| <p>Encourage participants to put their learning into practice by trying to recognise type; emphasise that the awareness and effort is more important than 'being right'.</p> <p>Remind the participants that we all have access to all four colours, so a person's type may not always be clear; pay attention to a series of clues (not just one).</p> <p>Emphasise the need to remove your own filters (projections) to effectively recognise type.</p> <p>Encourage participants to continue practising by looking out for colour energy clues in people on TV or in films, or simply by observing people in the office or wider environment.</p>  | <p>Allow participants to label people as 'red' or 'blue'; encourage respectful language.</p> <p>Allow any stereotyping.</p> <p>Allow people to use their colour energy preferences as an excuse for bad behaviour.</p>  |

### Notes

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# 09

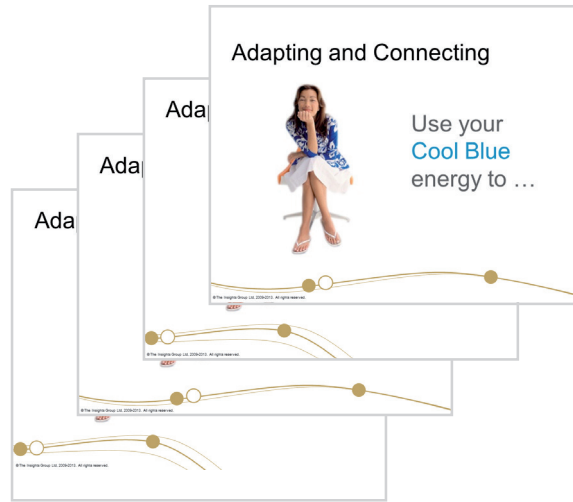
# Adapting and Connecting

## Learning outcomes

1. Practise the skill of adapting and connecting your style to someone else's, using more or less of each of the different colour energies to effectively influence.
2. Create an awareness that authentic adapting and connecting means being who you are, and making small adjustments to your approach to better connect with someone else's style.
3. Develop an appreciation for the persistence and patience required to make effective adapting and connecting a habit.



One side are the influencers and the other side are those being influenced – swap these roles for each round. Those being influenced are first asked to act as if they have dominant Cool Blue energy. The influencers are given one minute to adapt and connect with their partner and see if they can influence them to move to their town/join their team, or whatever scenario you have chosen. Next ask one of the rows to move to a new partner and switch roles. This time those being influenced act as if they have dominant Fiery Red energy and those doing the influencing work with a different topic. Repeat this process another two times until all colour energies have been completed.



Then, using the slide, summarise key tips for each colour energy. Remind participants this is not about being something you are not, this is about a small change – dialling down your dominant energy by a little, and dialling up their dominant energy by a little. This will do wonders for improving your ability to connect.



### Optional Exercise: Weather Report

Invite the participants to go to the flipchart of their lowest colour energy. Each group work together for five minutes to create a weather report that is designed to appeal to this colour energy.

They then present back, one group at a time. After each presentation, ask the people who it was designed to appeal to if it met their communication needs.

Debrief by asking each group what they adapted from their natural style and what they found challenging in doing this.

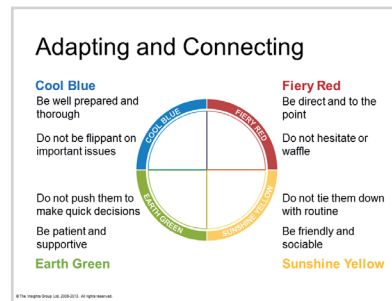
### Developing the skill

Have a discussion with your participants about the need to develop the skill and habit to successfully adapt and connect better with others. Relate this back to the learning attitude of children, and their persistence to learn a new skill.

#### Note:

For more content, there is a section on [Adapting and Connecting in the Discovering Team Effectiveness Workshop Journal](#).

**Alternative 1** – Instead of everyone role modelling the same colour energies at the same time, those being influenced can order their blocks and each influencer has to adapt differently depending on the colour order of their partner.



**Alternative 2** – Split the delegates into two groups: one will do the knee to knee exercise while the other group observe. After each round, the observers are invited to comment on what evidence they noticed of adapting to the preferences required. Make sure that the group swap roles so they get a turn in each position.

#### Personal development

- We are what we repeatedly do.
- Excellence then is not an act but a habit.







# 10

# Action Planning

## Learning outcomes

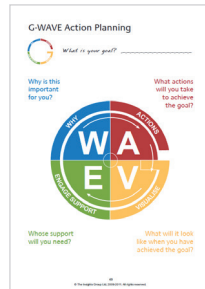
1. Create a goal with a strong action plan related to the workshop's activities.
2. Through listening to the goals of others as they are shared, become aware of additional goals that may be worth pursuing.

### How to run it

Ask participants to reflect on what they have learned and record this on page 48. Next invite them to identify what they most want to work on and define a clear goal.

### Goal setting

Share the G-WAVE process with the group and ask participants to complete a G-WAVE individually.



WORKSHOP JOURNAL

#### G – Identify the GOAL

**W** – Explore **WHY** it is important (connecting with Cool Blue energy)

**A** – Define what **ACTIONS** are necessary to reach the goal (connecting with Fiery Red energy)

**V** – **VISUALISE** it. Imagine you are already living the ‘end-state’ and describe fully what this looks like (connecting with Sunshine Yellow energy)

**E** – **ENGAGE** support from anyone whose help you may need to get you there (connecting with Earth Green energy)

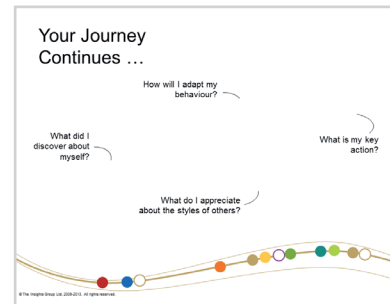
### Action sharing

Invite the participants to come around the outside of the mat, around their quadrant if they would like. Ask the participants to take turns and share the action they have committed to with the group. (This can be particularly powerful for an intact team.)



### Close

While everyone is still on that mat, share your final slide with the steps ‘Your Journey Continues’. Invite participants to reflect on these after the workshop. (They can capture their thoughts on page 52 of the Workshop Journal.)





You might also want to share some ideas for how the participants can keep the Insights Discovery language alive as they return to their work worlds.

Be sure to thank the participants for their time and energy, and share the last slide with your contact details in case they have any questions.



### Practitioner Tips for Action Planning

| Do  | Don't   |
|---|---|
| <p>Ensure participants walk away with at least one meaningful action they can personally commit to.</p> <p>Encourage sharing of these actions, if the group is willing.</p>  | <p>Skip this step for sake of time; an action may be a commitment to read their profile and a section of the workshop journal once a week for a month.</p>  |

### Logistics

In addition to having the right knowledge and expertise, there are also a few practical things to be taken care of in preparation for delivering a workshop.

Review the checklist on the following page to make sure you have everything covered.

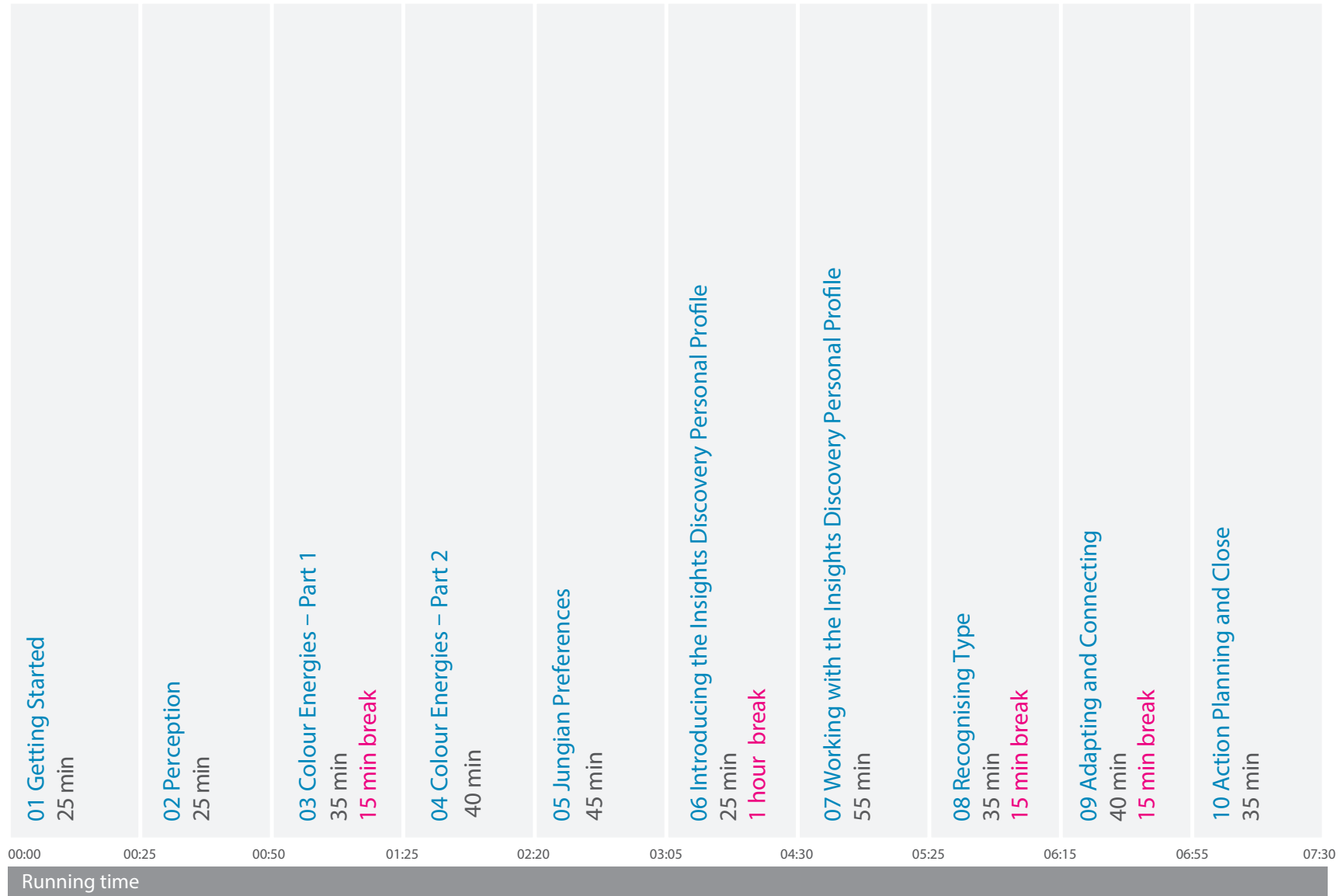
| To do   | Supporting information  | When?  |
|---|---|--|
| Make sure you can get Profiles generated.   | This may not be you. Someone else in your organisation may already be set up as internal administrator. Or Insights might do this on your behalf. Speak to your Insights contact or support.<br>(If it is you, and you need to get access to Insights Online, you will get access to tutorial videos on how to use Insights Online.)<br>If you are generating profiles, make sure you buy credit (these are called 'units') on Insights Online for purchasing profiles. | As soon as possible after completion of your confirmation of learning. |
| Ensure delegates complete evaluators.   | Send out workshop invitation and evaluator link via email. (Again, this may be done on your behalf.)  | 2-3 weeks before event with clear deadline one week before.            |
| Ensure you have your necessary Delegate materials:<br><a href="#">Insights Discovery Personal Profile</a><br><a href="#">Workshop Journal</a><br><a href="#">Set of Blocks</a><br><a href="#">Others ...</a>  | Order (or check with your administrator) that you'll have materials for each delegate.<br>Contact your Insights contact for how to order in your region. Materials can be sent to you directly or to the venue. Make sure to supply the necessary details for shipping.<br>If you are a CP, contact your local contact regarding pricing.<br>If you are an LP, refer to the price list in your support pack.  | 4 weeks before event   |
| Facilitation materials:<br><a href="#">Mat</a><br><a href="#">Slides</a><br><a href="#">Agenda</a><br><a href="#">Cards</a><br><a href="#">Ball</a><br><a href="#">Stepping Exercise card</a><br><a href="#">Four colour flip chart markers</a><br><a href="#">Others ...</a> | Some of these materials you need are supplied during the IDA.<br>Mats are not, because your organisation may already have these available for you to use. If not, we would encourage you to order one! They come in four sizes – 3ft, 9ft, 12ft, 15ft and in two materials – fabric or vinyl.<br>As above, contact your local contact if you are a CP or refer to the price list in your LP support pack for pricing.   | 4 weeks before event for new materials.                                |
| Venue:<br><a href="#">Request four flip charts?</a><br><a href="#">Projector and table?</a><br><a href="#">Check space for mat and activities (e.g. stepping exercise)</a>  | Ensure you have what you need at the venue for a successful workshop.   | 2-3 weeks before event (and morning of the event confirm it is there!) |
| Create a Team Wheel   | Collate delegate evaluators and do this on Insights Online (need help? call us!).   | 1 week before event  |
| Check on team's objectives  | Meet with the team sponsor or team manager and discuss what their objectives for the session are. What do they need the session to achieve? Consider your session design and how you can meet the objectives.   | 1-2 weeks before event   |

So, that's it!

We hope we've given you all the information you need to deliver an engaging, enriching Beginning the Journey workshop.

Now all you have to do is go out there and be outstanding.

We believe you will be!







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