insights®

Insights Discovery Accreditation

Preparing to deliver

Name: _____

Preparing to deliver this practitioner guide

This practitioner guide contains guidelines for creating and delivering an impactful Insights Discovery - An Introduction 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 for both face-to-face and online sessions, tips, options and a selection of questions to ask.

Contents

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.

Chances are you have a group of people looking forward to a change from their typical day job, possibly a little (or a lot!) uncertain about what the session 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 in this practitioner guide 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 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.

You'll notice that there are two agendas, one designed for face-to-face delivery and one for online. The running times are different to accommodate the different environments. When face-to-face, we recommend taking a day for the greatest impact, whereas online delivery uses the power of pre- and post-work to reduce the time spent at a computer screen.

To do	Supporting information	When?
Decide whether you are delivering face-to-face or online	Discuss with the session sponsor which delivery format is most appropriate so that you can prepare accordingly.	As soon as possible
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. (If it is you, you will be given access to the online system with supporting tutorials to show you how to use it.) If you are generating profiles, make sure you buy credit (these are called 'units') on the system for purchasing profiles.	As soon as possible
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: Insights Discovery Personal Profile Workshop journal Set of blocks Others …	Order (or check with your administrator) that you'll have materials for each delegate. 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. If you are a CP, contact your local contact regarding pricing. If you are an LP, refer to the price list in your support pack. Consider which materials you will provide electronically and which you will provide in hard copy (particularly if you are running an online event).	4 weeks before event
Facilitation materials: Mat Slides Agenda Card game Stepping exercise cards Four colour flip chart markers Others …	Some of these materials you need are supplied during the IDA. Mats are not, because your organisation may already have these available for you to use. If not, we would encourage you to order one! As above, contact your local contact if you are a CP or refer to the price list in your LP support pack for pricing. If delivering online, consider the electronic learning environment and prepare your space. This might be customising the platform 'room' or just arranging your own workspace to support your delivery.	4 weeks before event for new materials
Venue: Request four flip charts Projector and table Check space for mat and activities (e.g. stepping exercise)	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 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

Face-to-face delivery

Contents

Best practice agenda – face-to-face delivery

Run time	Agenda item	Workshop journal (WSJ)	Key purpose and focus	Duration
00:00	Getting started			25 min
	Welcome and positioning		• Set the stage – it's about connections and relationships • Ask participants to 'pick their person', a relationship they want to improve • Share the importance of attitude and approach to learning (child at play)	5 min
	'Who am I?' activity	3	• Get participants interacting, learning something new about each other through the 'Who am I?' activity • Today, we'll keep asking the "Who am I?" question	10 min
	Steps to personal effectiveness	4	• Review four-step focus for the day • Ask for the additional objectives; write on flip chart	5 min
	Ground rules		• Create the ground rules for the day on the next flip chart	5 min
00:25	Perception			25 min
	Introduce concept of perception	6	• Click brings a blank page, next click reveals the slide title 'Perception'; introduce perception through a group discussion • Link their comments to key points about perception	2 min
	Old lady/young lady	7	• Click reveals quote and old lady/young lady image. Ask participants about the image – can they see both ladies? • What's the story they have about each lady? How old? From where? Kind of life?	3 min
	Ladder of perception	8-11	• Introduce ladder. Share an example • Have participants explore their own ladder experiences • Debrief and emphasise key learns	20 min
00:50	Colour energies – part one			35 min
	Insights Discovery card activity	-	• Each person starts with three of each colour; trade cards (not colour for colour) to end up with the cards 'like you'. • Have participants share one statement	15 min
	Adjectives word choice	12-13	• Share adjectives exercise on screen; ask they complete in WSJ • Ask participants to write the words most resonating for them for each colour in quadrant image on page 14 of WSJ	5 min
	Describing the colour energies (good day/ bad day)	14	• Use slide, bring colour energies to life (refer participants to the job aid in the WSJ) • Explain good day characteristics then possible bad day characteristics • Reinforce concepts of opposites and perception	12 min
	Your colour energy mix	14	• Reinforce we all have all four, just in different orders and different intensities • Ask participants to order their blocks from highest to least (or list the colour energies in order on page 14 of their WSJ)	3 min

Run time	Agenda item	Workshop journal (WSJ)	Key purpose and focus	Duration
01:25	**Break**			**15 min**
01:40	Colour energies – part two			40 min
	Colour energy activity	–	• Participants go to flip chart of their perceived dominant energy and complete the task you assign the group • Have groups present back • During debrief, highlight how colour energies are showing up	20 min
	Using each colour energy	FR – 17 SY – 19 EG – 21 CB – 23	• Using the slides and the workshop journal pages, reflective exercise • Have participants write down how they have used each of the four colour energies	10 min
	Strengths and frustrations	–	• Flip charts by colour in each corner • Round one: go to their perceived highest colour energy and articulate strengths. Consider benefit to the organisation • Round two: go to perceived lowest colour energy; identify the frustrations of using/working with. Also describe benefit • Debrief to ensure contributions of each of the four colour energies to the workplace are acknowledged	10 min
02:20	Jungian Preferences			45 min
	Concept of preferences	25	• Fold their arms and then fold them the other way (or write with dominant hand, then non-dominant hand)	2 min
	Stepping activity: your attitude and decision-making function	26-27	• Have group line up facing the screen; read I/E statements • In debrief, highlight key points (we all can do both; just have a natural preference; perception is relative to where we are) • Have group maintain their relative position, and turn and come to the other axis (face wall to right of the screen) • Repeat stepping exercise with decision-making statements • Have participants identify the quadrant they ended up in • Summarise Attitude preference with slide and page 26 of WSJ; then decision-making function with slide and page 27	20 min
	Jungian Preferences and the colour energies	29	• Using slide animation, explain how the colour energies are formed through the combination of attitude and decision-making function • Have participants plot their quadrant on page 29 of WSJ	3 min
	Perceiving function	30-31	• 'Write down what is there for you' and share image. Ask for examples. Use slides to explain Sensation vs Intuition • 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 • Give participants final opportunity before profile handed out to change their colour energy order they identified	20 min

Run time	Agenda item	Workshop journal (WSJ)	Key purpose and focus	Duration
03:05	Introducing the Insights Discovery Personal Profile			25 min
	Overview and face validity	40-41	• Ask participants to read overview section and complete a face validity analysis	15 min
	Graphs and wheels	44-45	• These graphs are from their responses to the evaluator • Use slide prompts to describe meaning of the Conscious graph, the Less Conscious and the Preference Flow • Colours above mid-line are inclined use; colours below the line are more reluctant use • This is a measure of preference, not capability • Wheel position (WP) determined by two factors; share basic quadrant lines and the three rings; discuss WP number • No WP better than any other; all capable of effective colour use	10 min
	Lunch			**60 min**
04:30	Working with your Insights Discovery Personal Profile			55 min
	Strengths and possible weaknesses	42	• Have participants review the strengths and possible weaknesses pages of their Insights Discovery Personal Profile • Ask participants to capture the top 2-3 statements from each in their WSJ, page 42	5 min
	Effective communication	43	• Ask participants to review communication dos and don'ts pages in their profile, and complete page 43 of the WSJ	5 min
	On-the-mat sharing	–	• Ask participants to stand outside of their quadrant, close to their 'wheel spoke' if possible. Bring their blocks/profile/WSJ • Identify team wheel by asking participants to set their blocks or a sticky note with their name on it on their wheel position • Take turns sharing statements from the profile or have a discussion regarding the colour energy combinations	30 min
	Team wheel discussion	46	• Discuss the energies and dynamics of this group • If not a team, discuss the idea that we are more than just our dominant colour energy; discuss dynamics of the day • If intact team, explore the dominant and inclined energy counts and discuss how well (or not) the team uses each colour energy	15 min
05:25	Recognising Type			35 min

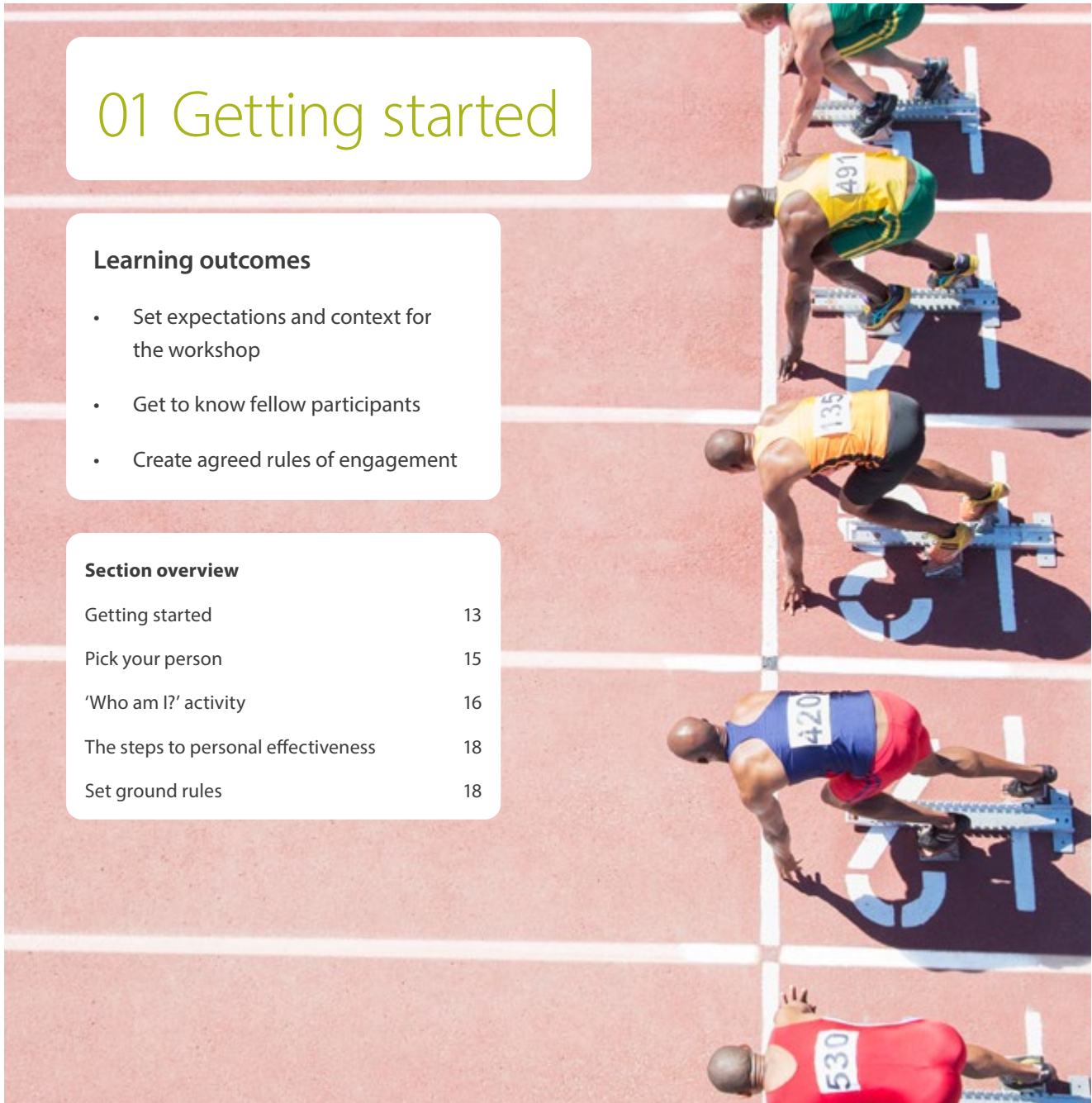| Run time	Agenda item	Workshop journal (WSJ)	Key purpose and focus	Duration
	Recognising clues	34-39	• Using the slides, discuss the idea of considering clusters of clues to recognise others' use of the colour energies	5 min
	Improving your relationship exercise	38-39	• Ask participants to think of the person they picked at the start, and their use of the colour energies (WSJ pages 38-39) • Walk through how to identify a person's eight type from highest and lowest colour energies (p 32 of WSJ) • Looking at the WSJ chart on page 33, ask group to consider what they might do differently to better interact with the person • Discuss the benefits of plotting their own 'team wheel', and considering the dynamics	15 min
	Colourful personalities	–	• Identify two to four 'famous' personalities • Ask the group to explore that person's use of each of the colour energies and agree a possible order of their colour energies • Ask the group to identify their eight type	15 min
06:00	**Break**			**15 min**
06:15	Adapting and Connecting			40 min
	Introduce concept	–	• Adapt to connect; desire to improve connection; mindset	5 min
	Adapting and Connecting exercise	–	• Run the knee-to-knee exercise, using influencing scenarios relevant to the group. Summarise with top tips by colour energy slide • 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	30 min
	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 • 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	5 min
06:55	Action planning and close			35 min
	Goal setting	48-51	• Have your participants reflect on what you have covered in the workshop and identify a goal or action they would like to achieve • Ask participants to first define the 'SMART' goal, and then take them through the G-WAVE process	10 min
	Action sharing	–	• Ask participants to share the action they have committed to • This can be particularly powerful in a team context	20 min
	Close	53	• Using the slide, review the four steps covered during the workshop, and check in on any objectives added by the group	5 min
07:30	**End**	**–**		

01 Getting started

Learning outcomes

- Set expectations and context for the workshop

- Get to know fellow participants

- Create agreed rules of engagement

Section overview

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 run it

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.
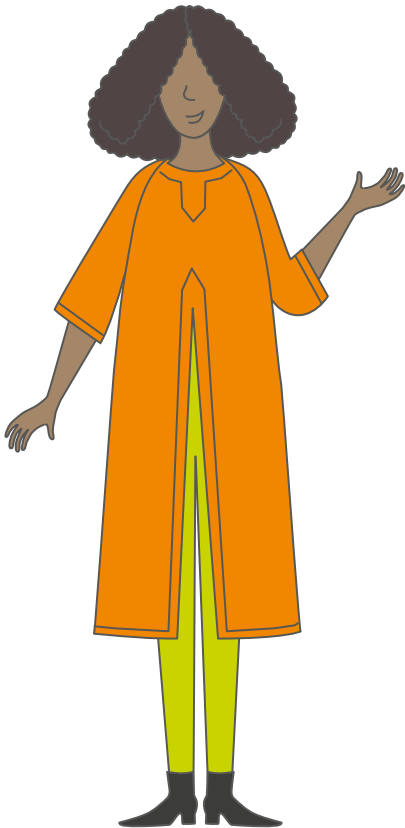
Today is about connections (5 minutes)

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 message 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?
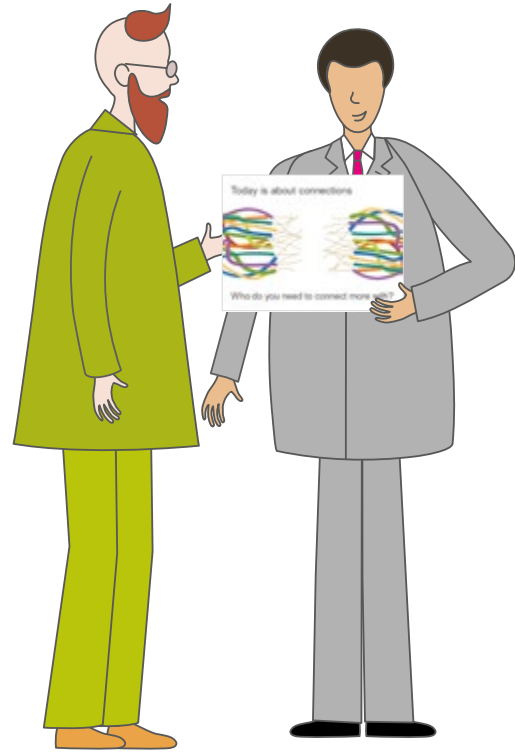
Pick your person

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 your participants to these. Encourage them to capture notes throughout and make the journal their own.

A child at play

"Man is most nearly himself when he achieves the seriousness of a child at play."
– Heraclitus

WORKSHOP
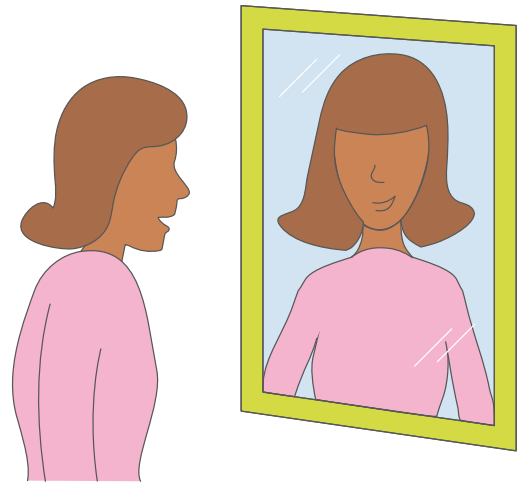JOURNAL

'Who am I?' activity (10 minutes)

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:

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

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

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

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

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 (5 minutes)

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.
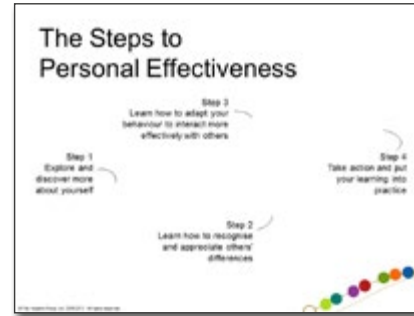
Set ground rules (5 minutes)

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
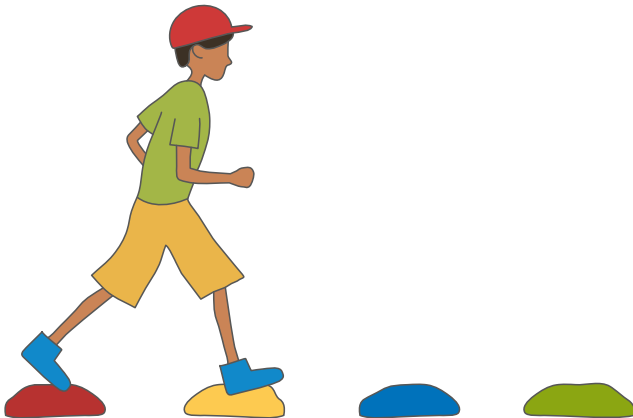
How to run it

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 in real time in the room).

Some suggestions of 'rules' we like:

- Participation
  - Ask questions
  - Share experiences
- Respectful listening
- Confidentiality
- Use of devices
- 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.

- ☐ timing
- ☐ value all colour
- ☐ participate
- ☐ be open
- ☐ be respectful
- ☐ phones off
- ☐ be tolerant
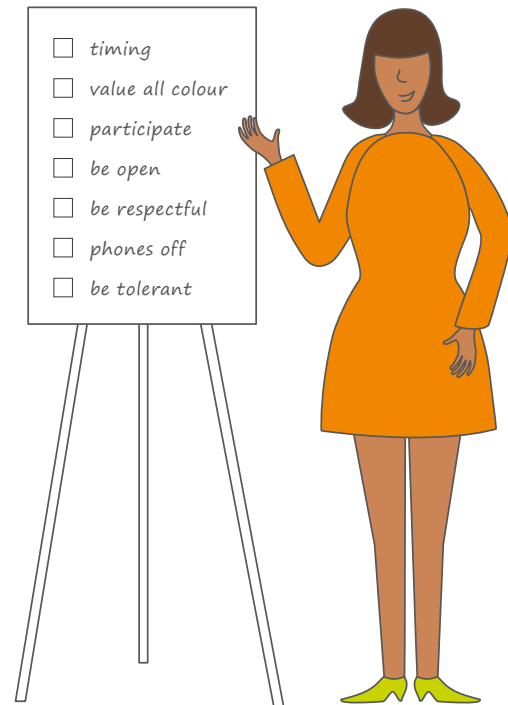
Are you happy with these ground rules?

Are there any that you would like to challenge?

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

02 Perception

Learning outcomes

- Appreciate that our perceptions can be different from those of others

- Understand how perceptions are formed

- Awareness of how judgements about different views can be the source of misunderstanding and challenges in relationships

- Awareness of how our perceptions can be changed

Introduction to perception (5 minutes)

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 lesson 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 old lady/young lady slide, and ask participants to turn to the image of the old lady/ young lady on page seven in their workshop journal.

Start by asking 'What can you see?' to allow open exploration. If your participants have seen this image before, that's a good thing! It means that you can explore how often we feel like we've seen our workplace before. It can leave us complacent and we stop looking for more information. Throw in a challenge. Can everyone see the bird? Or the lion?
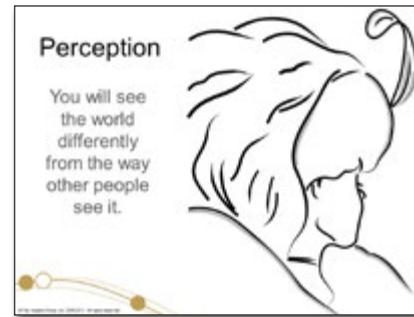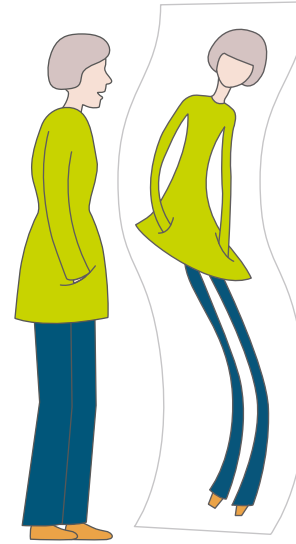
WORKSHOP JOURNAL

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's her life like?

Move your questioning to build on the key lessons 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.

Perception alternative – 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.

– Valerie Cox

Ladder of perception (20 minutes)

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.

The event: an objective view of everything in the situation.

My perception: the information I choose to select from the event.

Value judgements: evaluation of my perception based on my own personal values.

Intepretations: looking at the possibilities of what this could mean.

Logical conclusions: the conclusion I make based on the interpretations I've drawn.

Responses: the physical and emotional responses I feel based on my conclusion.

Beliefs: the belief I form and carry forward to inform all future situations that are similar or involve the same individual.

Action: the final step and the part that others will see, what I decide to do based on the story I have told myself.

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.

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.

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

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

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?

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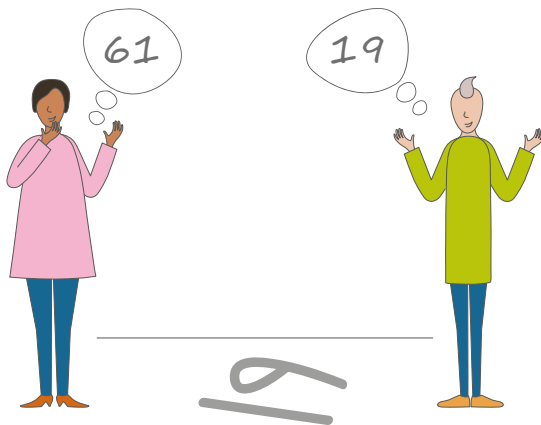
Perceptions impact how we respond to our colleagues, our friends, and our family.

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. Talk about how we can change our perceptions. 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).	Allow participants to criticise one view over another – encourage acceptance of all views. Show more than two or three images. You can lose the key lessons and become fixated on solving the picture puzzles.

Why not …

Share **'The Cookie Thief'** poem by Valerie Cox (p.23) if you're looking for something different. You could also weave this into the ladder discussion.

03 Colour energies – part one

Learning outcomes

- Your colour energies are a filter for how you perceive the world, the people in it and your relationship to them

- 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

- Appreciation for the dynamic nature of the opposite energies

- Awareness of respectful use of the common language (e.g. valuing/honouring/inclusion vs. labelling/stereotyping/isolating)

Section overview

Insights Discovery card activity (15 minutes)

Why do this?

- It gets people up, interacting and thinking about how they would describe themselves

- This is an easy way 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.
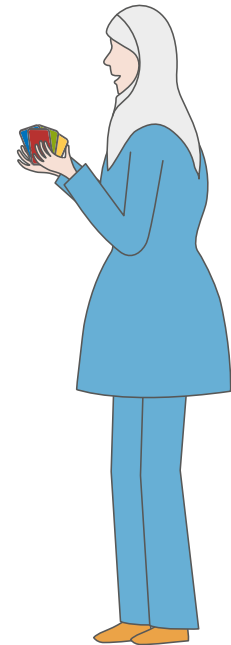
How many cards
of each colour
do you have?

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
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. Pay attention to any cards that cause a reaction; link back to perception.	Worry too much about whether or not people's cards will align to their profile. Interrupt the participants too much; mostly observe, and then use your observations to emphasise the learning.

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 (5 minutes)

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.

You can explore the mixture that each participant has created. Ask who has claimed words that were all of one colour, who had a mixture of two colours and so on. This supports the future concept that we are a mixture of all four colour energies and that we all have our own relationship with the preferences.

WORKSHOP
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Describing the colour energies

(12 minutes)

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

How to run it

Beginning with any of the four colour energies (your slides are set to reveal Fiery Red first), give a brief description of that colour energy. Be sure to describe the energy as something that can be used by any of us, not as a label. If you have run the card game previously, ask participants who are holding a Fiery Red card to read out those statements. This helps participants to develop a

broad understanding for what characteristics make up the colour energy. Next, ask each person to turn to the person next to them and provide an example of how they personally use that colour energy. What aspects of that colour energy do they draw upon, and in which situations?

Repeat this exercise with each of the colour energies. If you move next to Earth Green energy, you can help participants notice the opposite nature of these two colour energies through your descriptions of each. This will help later when you are defining the colour energies using the attitudinal functions and also when you describe how the less conscious graph is derived from the conscious graph. Next you would describe Sunshine Yellow and then Cool Blue so that you could point out the opposite relationship between those two colour energies.

The colour energies on a good day

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.

Cool Blue energy Cool Blue energy is a questioning, observant and analytical energy. When we're using our Cool Blue energy, we 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 ideas with others. You might often hear our 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 we're using our Fiery Red energy, we 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 our Fiery Red energy asking "so what?" or "what's next?" and we may not even be asking, we might be telling. As you can see on your block, the motto for Fiery Red energy is 'Be bright, be brief, be gone'.

COOL BLUE
formal
precise
cautious
deliberate
questioning

FIERY RED
purposeful
competitive
demanding
determined
strong-willed

EARTH GREEN
encouraging
caring
sharing
patient
relaxed

SUNSHINE YELLOW
demonstrative
enthusiastic
persuasive
sociable
dynamic

Cool Blue: formal, precise, cautious, deliberate, questioning

Fiery Red: purposeful, competitive, demanding, determined, strong-willed

Earth Green: encouraging, caring, sharing, patient, relaxed

Sunshine Yellow: demonstrative, enthusiastic, persuasive, sociable, dynamic

Earth Green energy Earth Green energy is a calming, nurturing, supportive energy. When we're using our Earth Green energy, we 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 we're using our Sunshine Yellow energy, we appear friendly, persuasive, and animated. We are concerned with the group dynamic and like to ensure everyone is included. You will often hear our Sunshine Yellow energy because typically, we 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 clarify what is meant by "bad day" as how we may show up when under pressure or stress or how our least preferred colour energies may show up when in use. As you describe each colour energy's bad day characteristics, emphasise that it may be that the individual showing up with bad day Fiery Red/Sunshine Yellow/Earth Green/Cool Blue energy may be either overusing their strengths, under stress or pressure, or it may be that the person perceiving the 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 it.

That which we don't understand in ourselves, we tend not to understand in another.
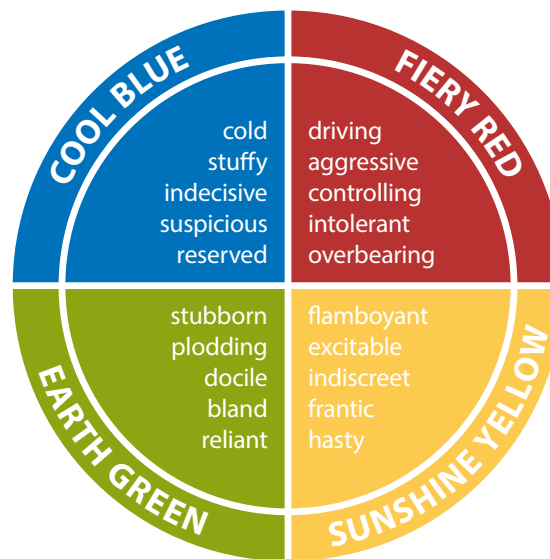
Bad day Cool Blue energy

Normally observant, calm, collected and questioning, on a bad day Cool Blue energy may be perceived as nit-picking or indecisive, even suspicious. Sometimes Cool Blue energy comes 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. Being rushed to make a decision or choice without all of the information perceived to be necessary can make Cool Blue energy 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. Which energy is most likely to see the bad day aspects of Cool Blue energy? (Sunshine Yellow energy.)

Bad day Fiery Red energy

The bold, decisive, action-oriented energy, when under pressure or on a bad day, Fiery Red energy may appear to others as overly demanding, impatient, intolerant or even arrogant. Fiery Red energy is about getting results and getting things done. If these things are not happening, Fiery Red energy may step in and take control. Why might this be happening? If things appear to be spiralling out of control, Fiery Red energy may respond by putting on the pressure to get whatever needs to happen, happen better and faster. This drive to take over, sometimes no matter the cost, may cause other colour energies to perceive Fiery Red energy as overbearing or intolerant. Which energy is most likely to see the bad day aspects of Fiery Red energy? (Earth Green energy)

COOL BLUE
cold
stuffy
indecisive
suspicious
reserved

FIERY RED
driving
aggressive
controlling
intolerant
overbearing

EARTH GREEN
stubborn
plodding
docile
bland
reliant

SUNSHINE YELLOW
flamboyant
excitable
indiscreet
frantic
hasty

The circle diagram shows four energy quadrants:

COOL BLUE
cold
stuffy
indecisive
suspicious
reserved

FIERY RED
driving
aggressive
controlling
intolerant
overbearing

EARTH GREEN
stubborn
plodding
docile
bland
reliant

SUNSHINE YELLOW
flamboyant
excitable
indiscreet
frantic
hasty

Bad day Earth Green energy

The caring, supportive, patient style of the Earth Green energy, when overextended, can come across as plodding, bland, stubborn, or reliant. What is often happening is something of great importance is being devalued, and Earth Green energy may become quietly resistant. Earth Green energy doesn't enjoy conflict on a good day, but on a bad day may do whatever it takes to avoid it. In attempting to keep the peace, Earth Green energy can appear docile, though very likely has a strong opinion about the way things should go. Which energy is most likely to see the bad day aspects of Earth Green energy? (Fiery Red energy.)

Bad day Sunshine Yellow energy

The dynamic, outgoing, friendly, and sociable Sunshine Yellow energy, when overextended, can appear frantic, scattered, indiscreet, and hasty. Sunshine Yellow energy thrives on involvement and acknowledgement, and if in some way feels excluded, Sunshine Yellow energy may come across as excitable and over the top in an attempt to get involved or to be sure that the right people and ideas are considered and included. Which energy Is most likely to see the bad day aspects of Sunshine Yellow energy? (Cool Blue energy.)

Your colour energy mix (3 minutes)

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 colour energies and record this on page 14.

TIP: Once they sort their colour blocks, ask participants to share with the room their current perception of their style.
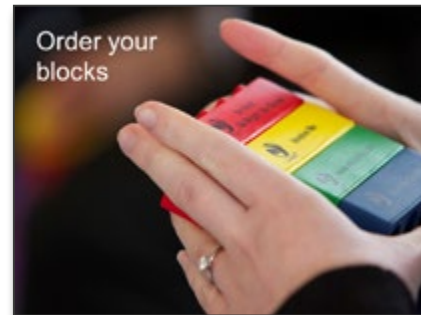
WORKSHOP
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In the flow of the workshop agenda, you are scheduled to take a 15-minute break here.

Disrespectful use of language

"Blue people ..."

COOL BLUE

FIERY RED

Stereotyping – creates negative images and limits potential.

"Reds are so ..."

"Greens always ..."

EARTH GREEN

SUNSHINE YELLOW

"I am not a yellow ..."

Respectful use of language

"With my dominant blue energy ..."

COOL BLUE

FIERY RED

Acknowledges all preferences and encourages development of potential.

"Our preference for using red energy ..."

"Thinking about this from a green energy perspective ..."

EARTH GREEN

SUNSHINE YELLOW

"When we draw on our yellow energy ..."

Colourful vocabulary

COOL BLUE

FIERY RED

EARTH GREEN

SUNSHINE YELLOW

04 Colour energies – part two

Learning outcomes

•   Experience how colour energy preferences show up in others

•   Have an individualised awareness of their relationship to each of the four colour energies (how does this energy come through you?)

•   Appreciate your unique combination of your own energies

Section overview

Colour energy activity: team celebration
(20 minutes)

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.

04

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.

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.

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 (10 minutes)

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 if 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 (10 minutes)

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
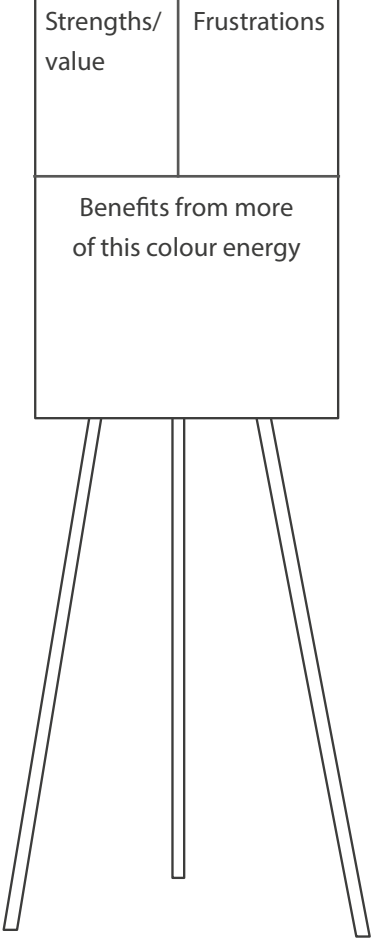
How to run it

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.

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.

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?

Strengths/value	Frustrations

Benefits from more of this colour energy

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	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 ways to engage with the colour energies.

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05 Jungian Preferences

Learning outcomes

- Understand the Jungian attitude and functions and how these relate to the four colour energies

- Create an awareness of your own preference for the attitude, decision-making and perceiving functions

- Create an awareness of how the perceiving functions are present in all four colour energies

- Awareness that the attitude and functions each operate on a continuum, and we all operate within a range on that continuum

- Our strength of preference impacts our view of others (my perceptions of others are relative to where I am in my preference)

Section overview

Introduction to preferences (2 minutes)

Why do this?

- To help participants become familiar with the concept of preference

How to run it

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 more 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.

Alternative: ask participants to write their first name on a piece of paper and notice how it feels. Then ask them to switch the pen into their other hand and write their name again. Explore how it felt and what the outcome was. Did they still manage to write their name?

In the discussion, explore the idea of practice. If you were injured and unable to write with your dominant hand for a while, would your non-dominant handwriting become easier? When the injury is healed you will likely still revert to your original preference but, with practice, another approach can become easier.

The Jungian Preferences

"Every advance, every conceptual achievement of mankind has been connected with an advance in self awareness."
– Dr Carl G Jung

Stepping activity: your attitude and decision-making function (20 minutes)

Why do this?

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

How to run it

Your attitude - 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. You can also use the words listed in the workshop journal, and, if the space is not large enough to do the stepping exercise, participants can mark where they fall on each continuum in their workshop journal.

Once your participants are spread out across the left and right sides of the Insights Discovery wheel mat, show the slide for attitude and let participants know that they have divided themselves up based on their attitude as defined by Carl Jung.

Since Jung's definition of 'attitude' differs from common usage, it may be helpful to share that, in this context, 'attitude' refers to one's orientation to the world, or the way one reacts to experiences. Some people understand it as how we get our energy. There are two attitudes: Introversion and Extraversion. Those with a preference for Introversion identify more with the words on the left side of the slide, and may tend to orient themselves internally, gaining energy by being alone or with a few close friends. Those with a preference for Extraversion identify more with the words on the right side of the slide, and may tend to orient themselves externally, gaining energy by being around other people and engaging in the world around them. In our model, people are not Introverts or Extraverts, but may have a preference for one of these over the other a majority of the time.

In our model, Cool Blue and Earth Green are the Introverted energies, while Sunshine Yellow and Fiery Red are the Extraverted energies.

The decision-making function
– Thinking and Feeling

Ask your participants to maintain their position on the I/E continuum as much as possible, but to move forward or backward until they are standing shoulder to shoulder on the other axis of the mat, which divides Cool Blue and Fiery Red from Earth Green and Sunshine Yellow. They may have to move a little bit, but try to stay on the side of Introversion or Extraversion as best they can.

Then run the stepping exercise using the Thinking and Feeling statements on your practitioner job aid or the words in the workshop journal, asking people to step forward or backward when they identify with a word or statement.

Once your participants are spread out across the top and bottom sides of the Insights Discovery wheel mat, show the slide for decision-making function and let participants know that they have divided themselves up based on their preference for either Thinking or Feeling as defined by Carl Jung.

Those with a preference for Thinking identify more with the words on the left side of the slide, and may tend to make decisions through a logical rationale by using knowledge or objective facts.

Those with a preference for Feeling identify more with the words on the right side of the slide, and may tend to make decisions and judgements more subjectively based on personal values and who will be impacted by the decision. In our model, people are not Thinkers or Feelers as we all use both, but we usually have a preference for one of these over the other.

In our model, Cool Blue and Fiery Red energies are the Thinking preference energies, while Earth Green and Sunshine Yellow are the Feeling preference energies.

Jungian Preferences and the colour energies (3 minutes)

After you have described the decision-making preferences and how they connect to the colour energies, ask participants to look down and notice what colour energy they are standing on after the stepping exercise. This may be their dominant energy, and even if it is not, it is likely to be an energy they can connect with quite well. This is because each colour energy is a combination of either Introversion or Extraversion, and either Thinking or Feeling.

Click through the slide to review and confirm how the Jungian preferences combine to form the four Insights Discovery colour energies.

If your group is using the workshop journal, ask the individuals to go back to their seats and rate themselves on the continuums in the journal for attitude and decision-making function. After completing these pages 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 workshop journal, and can be an indicator to the participants of which may be their dominant colour energy preference.
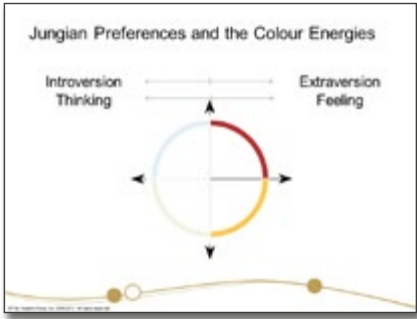
Key lessons from the stepping exercise

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. Those who have stepped towards Thinking would be in the R/B quadrants and those who have stepped towards Feeling would be in the Y/G quadrants.

The perceiving function (20 minutes)

Why do this?

- To help participants appreciate the perceiving function of Sensation and Intuition

- To explore how Sensation and Intuition can show up in every colour energy

How to run it

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. This is about how we perceive. According to Carl Jung, there are two ways that we take in and process information. We either use our five senses to see, hear, taste, touch, or smell what is actually there; or we use our 'sixth sense' of Intuition. Those with a preference for Sensation may connect more with the words on the left side of the slide, while those with a preference for Intuition may connect more with the words on the right side of the slide. As with the other preferences, we all use both, but probably have one that we use more than the other when we are taking in and processing information.
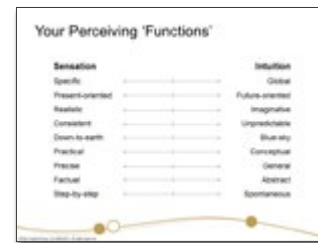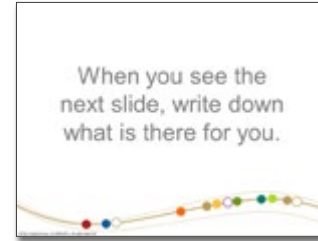
If you are using the workshop journal, ask participants to complete the self-assessment on Sensation and Intuition.

If you don't want to use an image there are other options to explore these concepts. You could simply ask your participants to look at the space around them and tell you what is there for them. Or ask them to write about a snowman and share their results.

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.
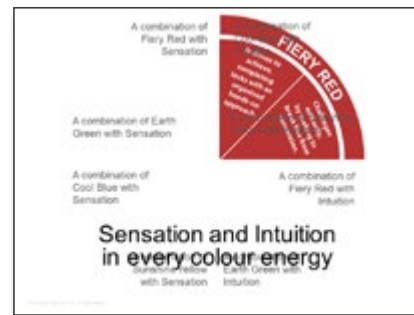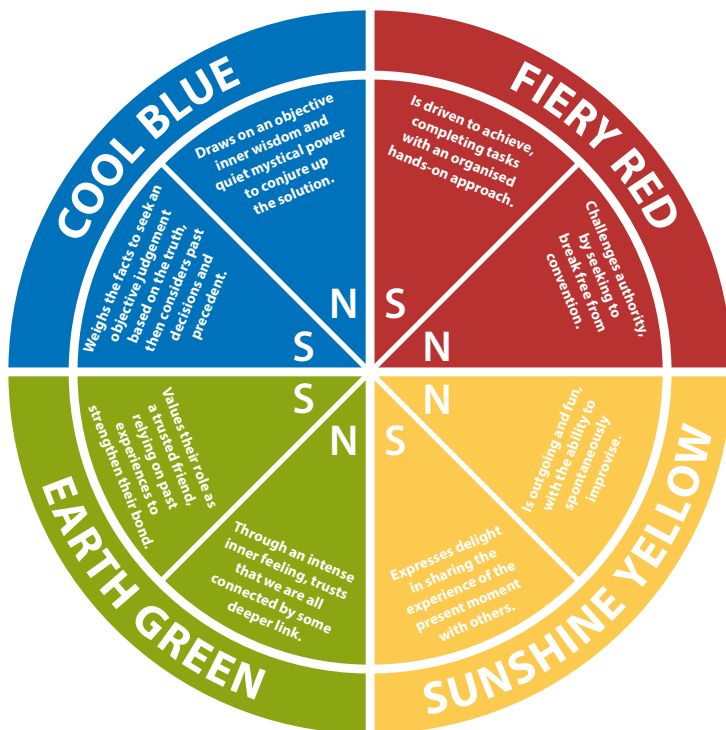
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Solidify their knowledge

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.

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

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?

Practitioner tips on preferences

Do	Don't
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?'	Expect all participants to understand the concepts the first time you share them. Allow them time to reflect and ask questions. Overwhelm them with your new-found knowledge; keep the session meaningful to them and their world.

06 Introducing the Insights Discovery Personal Profile

Learning outcomes

- Create an appreciation for the accuracy of their own profile

- Understand the key concepts of the graphs and wheel

Section overview

Introducing the Insights Discovery Personal Profile (15 minutes)

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.

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 by 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.

The Insights Discovery Personal Profile:

Face Validity

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

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 reading the overview pages.

Graphs and wheel (10 minutes)

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 Persona

10

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 social media; you have chosen them and want to share them with your 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 social media world sees you. This is like your less conscious graph."

Explain the mid-line; on either graph, colours above the mid-line suggest an inclined usage, colours below the mid-line suggest a less inclined or even possibly a reluctant usage. (Distance from the mid-point is significant!)

Remind participants that because a colour energy is your lowest, does not mean that you cannot effectively use that colour energy; it just means that it will take more effort, and you may not want to put in this effort for a sustained period of time.

The evaluator only measures preference for the colour energies, not how capable you are at using the colour energies. This is why the Insights Discovery Personal Profile should not be used to determine the actual job or role someone has (e.g. you have dominant Sunshine Yellow energy, therefore you should not be an accountant). Personal effectiveness comes through acknowledging our preferences, and using that awareness to pull on our least preferred energies when we need to, in increasingly effective ways.

Preference Flow

"The Preference Flow graph shows the flow of energy between the less conscious to the conscious persona. In other words, it indicates the extent to which the recipient is consciously boosting or restraining each of the colour energies. The percentage number below is just a representation of the overall energy change between less conscious and conscious."

- We can put energy into expressing more of a particular colour energy, in which case the bar will be shown moving in an upward direction. Or we can put energy into suppressing some of our less conscious energy which is shown by the bar going down

- We can explain objectively how the movement takes place between the graphs, we cannot begin to explain 'why'. Only the individual themselves will have the correct insight into what is going on in their Preference Flow and graphs

- Ask the group for some thoughts on what may cause the Preference Flow to flex; draw out their ideas then summarise by saying it could be any of those things, as well as many more

- Bring it back to the photo analogy: what are the adjustments you make when you realise a camera is pointed at you? Only you know why you make them but they're right for you. All of those micro adjustments are what's captured in the Preference Flow

- End this explanation by saying that in reality the Preference Flow is dynamic rather than static, as we adapt to the needs of numerous situations throughout each day. What we are seeing therefore is a snapshot at a point in time when they filled in the evaluator

The Insights Discovery wheel and your wheel position

Ask the individuals to turn to the wheel page in their profile. Then build the wheel, highlighting with simple explanations the quadrants, Eight Types, spokes and the three rings of the wheel (focused, classic and accommodating).

Share that only two factors determine an individual's wheel position for either their conscious or less conscious graphs – **the order of the colours and how many are above the line**.

Someone may say "I only have one pie graph". You then have the opportunity to explain that in some positions, the order of colours and the number above the line do not change between the conscious and less conscious graphs, so these pies are on top of each other.

Your wheel position can be thought of as your 'home address' on the Insights Discovery wheel. There might be others that live in the same location as you but your own home is very specific to you. When visiting someone that lives in the same place you might know roughly what to expect from each other. However, you can also visit others that live elsewhere, you might just need to consider the route you're going to take to get there.

Share open discussion about participants' wheel positions.

What examples do you have of behaving from your conscious wheel position?

When do you respond from your less conscious position (where it is different)?

When is your behaviour not consistent with your wheel position? Why?

Would anyone who knows you be surprised by your wheel position?

In the workshop agenda, you are scheduled to take a 60-minute lunch break here ... your participants can now share and review their profiles over lunch.

06

Practitioner tips on introducing the Insights Discovery Personal Profile

Do	Don't
Make sure participants have time to explore their profile and think about how they will use the information professionally and personally. Keep your explanation of the graphs and wheel simple. Stick to information that will be beneficial to your participants using the profile effectively. Encourage participants to capture key learning points in their workshop journals to recall what the graphs and wheel represent.	Overwhelm them with too much detail or theory. Forget they are 'Beginning the Journey', not attending an IDA! Forget to use the text available to you in the profile; expand beyond the overview, graphs and wheel pages.

07 Using the Insights Discovery Personal Profile

Learning outcomes

- Identify specific statements in the profile that are particularly accurate and worth sharing

- Appreciate the different needs of the individuals in the room through the statements shared

- Appreciate the dynamic of the people in the room through the lens of the team wheel and the different preferences for the colour energies

Section overview
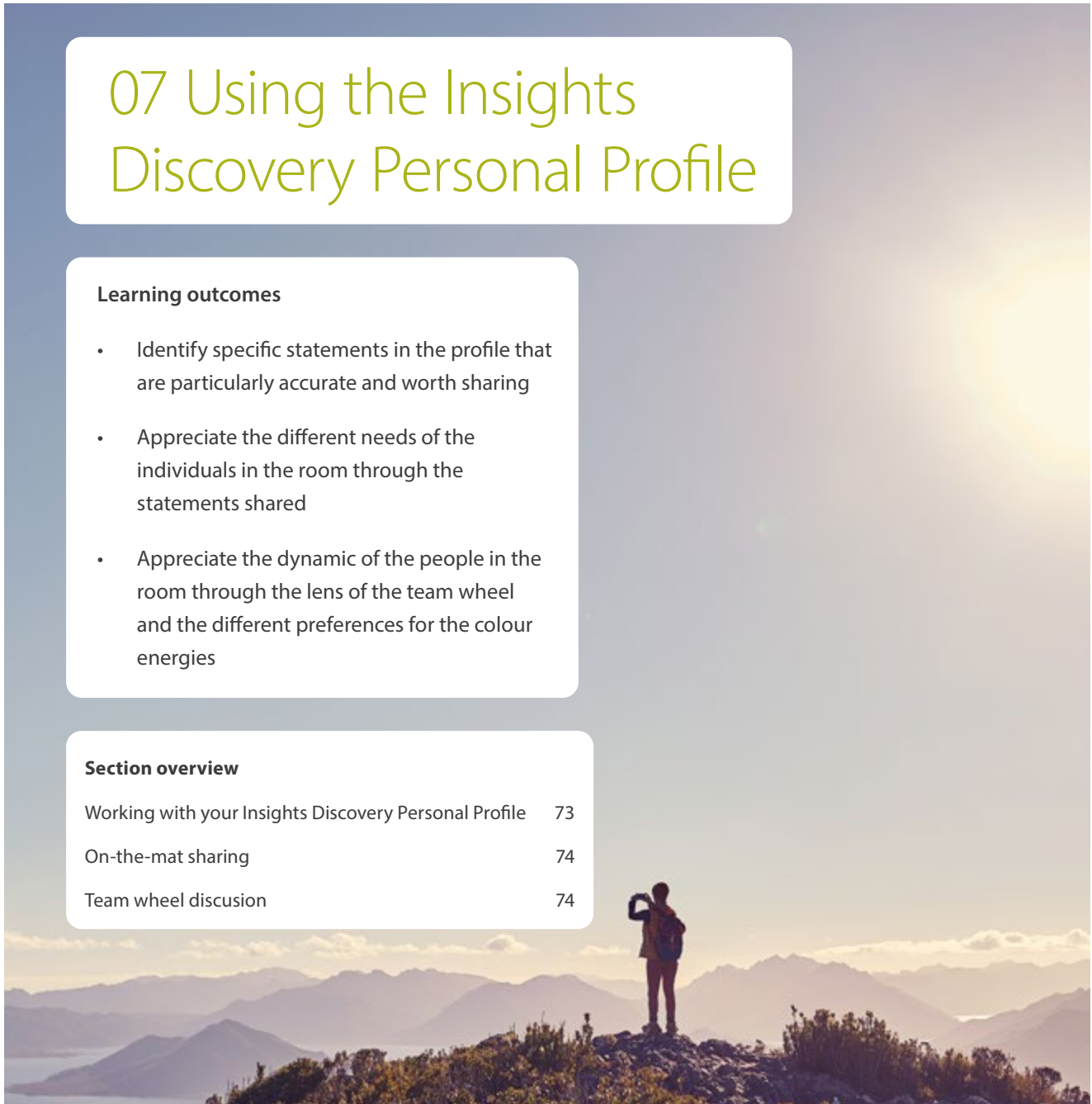
Working with your Insights Discovery Personal Profile (5 minutes)

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 two or three statements from each page in their workshop journal, page 42.

07

On-the-mat sharing (30 minutes)

Invite everyone to come to the mat with their blocks and profile.

- 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'.

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 experience the different colour energies and the orders in the group. If that's the case, try this:

1. 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 in these people today?

How do you use this colour energy?

How does it help you to be more effective?

What might be limiting the team when interacting internally or externally?

2. 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. Be aware that for anyone in a focused wheel position, this energy will be below the mid-line for them. Encourage each quadrant group to explore their use of that colour energy and to listen out for similarities and differences.

3. Repeat the same exercise with the quadrant of their third colour energy preference. At this stage anyone in a classic wheel position will have this colour energy below the mid-line in their graph.

4. Continue to the quadrant of their lowest colour energy preference, which will be below the mid-line for everyone. Notice who is standing with you but also observe anyone who is standing in the quadrant that you claimed as your dominant at the start of the activity. Those individuals are telling you that your highest colour energy preference is their lowest. If you have time for group discussions, consider changing the questions to what they value about this energy or what they would like to do more.

08 Recognising Type

Learning outcomes

- Develop an awareness of the different clues or signals people demonstrate in their behaviours that highlight their preferences for the different colour energies

- Consider various people and how they use each of the four colour energies, and understand the importance of looking for the behavioural evidence

- 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

- Begin to formulate how you might use this information to better connect with individuals who are different from you

Section overview

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 (five minutes)

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.

Recognising Types

Every time you meet someone you have the opportunity to practise your skill of recognising and adapting to their colour energies.

08
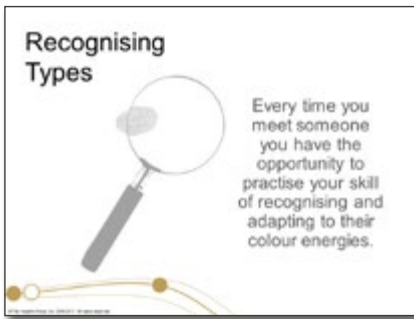
Verbal style (Workshop journal page 36)

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?
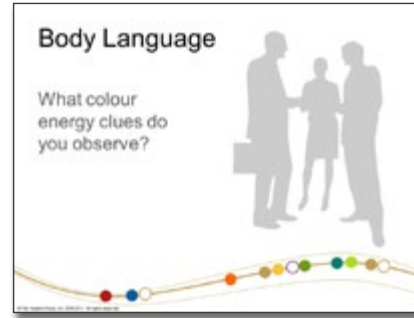
Improving your relationship exercise (15 minutes)

Summarise this section by asking participants to think about one, two or three people they want to improve their relationship with (if you did the exercise at the beginning where they 'picked their person', ask them to think of that/those individual/s now). Ask them to capture in their workshop journals on pages 38 and 39, the clues they see from that individual and what they believe their colour energies are.

Using the wheel on page 32, ask participants to tick the circle that represents their dominant colour energy. Then, focusing on that colour quadrant, get them to put a cross in the smaller circle that represents their lowest colour energy. This will allow them to determine their eight type.

Adapting and connecting

Ask participants to review the eight type summary content in the workshop journal (page 33) and consider what they might do differently to better interact with the person. Have them write this down on page 38 or 39, where they identified the behaviours for that individual.

Discuss with the group the benefit of knowing how to guess at someone's eight type. You can create your own team wheel and begin to consider the dynamics that might be at play. Think about project teams you work on, other colleagues you work with regularly. Maybe you want to consider your family or close friends? Use this information to then come up with small (or not so small) changes you can make to better interact with the individuals and the collective, based on your own self-awareness of your style.
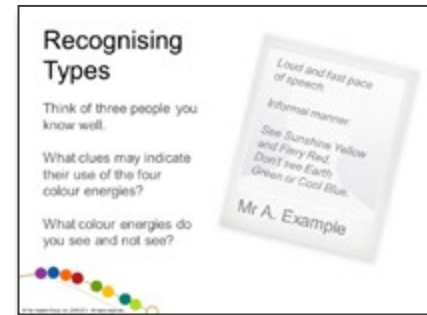
Colourful personalities exercise
(15 minutes)

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.

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.

If you have walked the group through the exercise on identifying the Eight Types, you can have the groups return to their flip charts and identify the eight type for their chosen personality based on the colour energy they think this person leads with and the colour energy they think is this person's lowest preference.

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
Encourage participants to put their learning into practice by trying to recognise type; emphasise that the awareness and effort are more important than 'being right'. 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). Emphasise the need to remove your own filters (projections) to effectively recognise type. 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.	Allow participants to label people as 'red' or 'blue'; encourage respectful language. Allow any stereotyping. Allow people to use their colour energy preferences as an excuse for bad behaviour.

08

09 Adapting and connecting

Learning outcomes

- Practise the skill of adapting and connecting your style to someone else's, using more or less of each of the colour energies to effectively influence

- 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

- Develop an appreciation for the persistence and patience required to make effective adapting and connecting a habit

Section overview

Introduce concept

Why do this?

- These concepts are easy to understand but the skillful application of this knowledge can be quite difficult; practice is vital.

How to run it

Discuss with participants the idea that once we have an estimate of someone's dominant colour energy, or even their likely eight type, we still need to do more to better connect with that person. We need to actually make small shifts in our behaviour so we better meet their needs. Discuss the importance of having the right mindset for adapting and connecting, and the importance of authenticity.

What is the right mindset for better adapting and connecting?

60

Knee-to-knee exercise (30 minutes)

Why do this?

- This exercise gives participants an opportunity to practise their ability in adapting their behaviour to suit different styles – key in any influencing situation.

How to run it

Choose topics that are specific and related to the business or team, e.g. if you are working in a pharmaceutical company find a scenario that relates to that world, such as selling a drug to a medical professional. Some scenarios that can easily be amended include influencing the person opposite to:

- Move to your town/city

- Join your organisation

- Join your team

- Take over your job

- Attend this course

Adapting and Connecting Exercise

Arrange in two rows facing each other.

In this activity, you will be asked to practise using each of the four colour energies in turn for one minute each. The intention is to positively influence the other person.
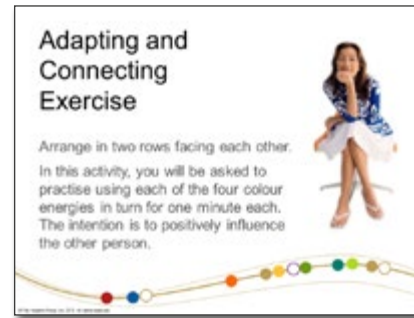
The group sits 'knee-to-knee' (or stands face-to-face!).The format should look something like this:
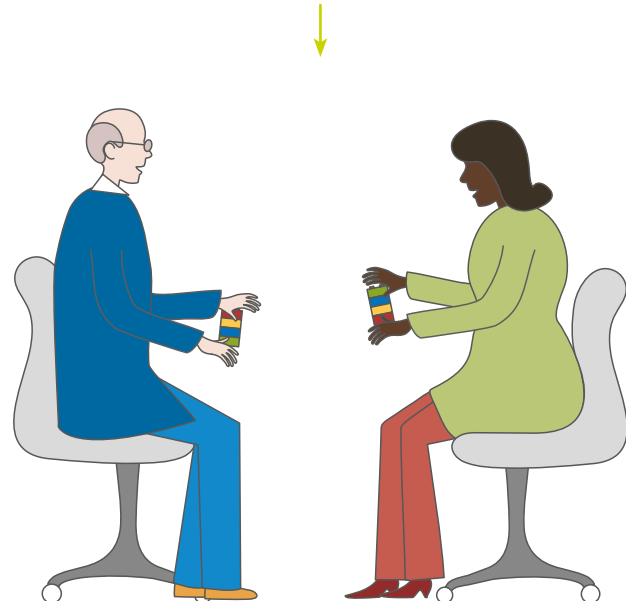
One side are the influencers and the other side are those being influenced – swap these roles for each round. Those being influenced are first asked to act as if they have dominant Cool Blue energy. The influencers are given one minute to adapt and connect with their partner and see if they can influence 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.

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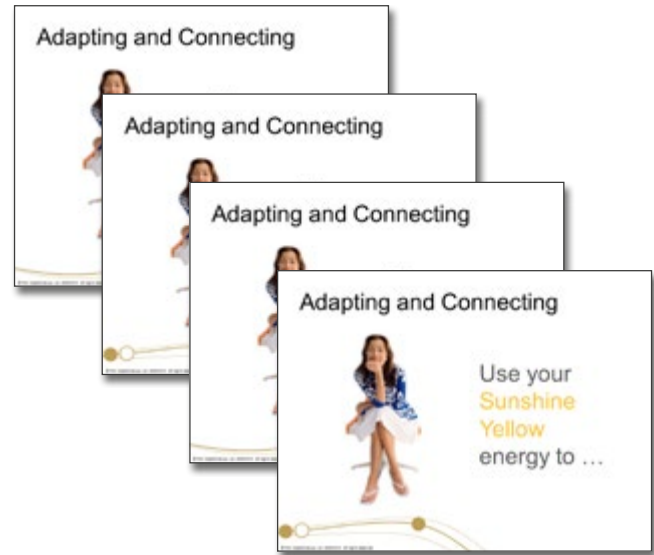
Then, using the slide, summarise key tips for each colour energy. Remind participants this is not about being something you are not, this is about a small change – dialling down your dominant energy by a little, and dialling up their dominant energy by a little. This will do wonders for improving your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

Optional exercise: weather report

Invite the participants to go to the flip chart 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 preferred 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.

Practitioner tips for adapting and connecting

Do	Don't
Make it practical; have participants commit to action on at least one thing. Let participants know this is an easy concept to understand and, like any skill, takes a lot of practice to do well. Remind participants that one of the most important factors in connecting to someone else is the true desire to do so. Emphasise the importance of being authentic in interactions – adapting and connecting is NOT about being something you are not (this is the chameleon principle – even though they change colour they are still a chameleon).	Dwell solely on the four colours; consider the Eight Types. Think just one session will change behaviour; this skill requires commitment and follow-up.

60

10 Action planning

Learning outcomes

- Create a goal with a strong action plan related to the workshop's activities

- Through listening to the goals of others as they are shared, become aware of additional goals that may be worth pursuing

Section overview

Goal setting

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.

How to run it

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

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)

WORKSHOP
JOURNAL

10

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
Ensure participants walk away with at least one meaningful action they can personally commit to. Encourage sharing of these actions, if the group is willing.	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.

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 at the beginning of this practitioner guide to make sure you have everything covered.

10

Online delivery

Contents

Best practice agenda – online delivery (two hours)

This agenda requires the distribution of Insights Discovery profiles before the session and use of the online pre-work activities

Run time	Agenda item	Tools	Key purpose and focus	Duration
-00:15	Webinar setup			15 min
	Check participant audio and visual setup is working		• If possible, add an extra 15 mins to the two-hour session to ensure everyone can set up audio and visuals • Taking this time can avoid potential technology issues once the session begins	15 min
00:00	Getting started			20 min
	Objectives	Chat Microphone	• Position the session and provide space to note any questions which might have come from the e-module and pre-work	10 min
	Who would you like to improve your relationship with?	Paper and pencil	• Ask your participants to 'pick their person', i.e. write down the name of someone in their life who they would like to improve their relationship with • Tell them to keep this person in the back of their mind during the session	2 min
	'Who am I?' activity	Chat Microphone	• Ask participants to write down ten sentences that starts with 'I am …' on paper. When they are done, ask them to share a few examples in the chat • Ask them what reflections they can see when looking at the different answers in the chat. If time will be limited this can be a quick exercise using chat only with three sentences	8 min
00:20	Perception			10 min
	Review perception from e-learning module and general discussion about (or description of) perception. Understanding that perception is the way in which we regard, understand, and interpret the world and our perception is unique.	Chat Microphone	• Remind participants about the old lady/young lady exercise in the e-module. Do perception scenario and the ladder of perception based on the team's objectives and/or spend more time on one of the exercises	10 min
00:30	Colour energies			15 min
	Overview of the Insights Discovery colour energies	Chat Microphone	• Remind participants of the pre-work e-module • Build an understanding that we all have the four colour energies within us, and we can use and develop each one of them	15 min

Run time	Agenda item	Tools	Key purpose and focus	Duration
00:45	Jungian preferences			20 min
	Choose different exercises to self-estimate own preferences to gain self-awareness. Overview the different preferences and how they show up in the colour energies and the Insights Discovery wheel.	Annotate Chat Microphone	• Remind participants of the pre-work e-module • Build an understanding of the preferences and how they show up in the colour energies	20 min
01:05	Introducing the Insights Discovery Personal Profile			20 min
	Describe the evaluator and the graphs. OPTION: Discuss in smaller groups their graphs and strengths/possible weaknesses. OPTION: Discuss how their preferences show up in the team.	Poll Breakout room Chat Microphone	• Remind the participants of the pre-work and the accuracy exercise; ask them to put their result in the poll • Breakout rooms with three to share: • OPTION: graphs, Preference Flow story, one strength that shows up at work • OPTION: Value to the team statements	10 min
	Review the Insights Discovery 72-types wheel and review the team wheel.	Chat Microphone	• Building an understanding of the factors that determine an individual's wheel position for their conscious and less conscious graphs • Understand how the colour energies appear in the team	10 min
01:25	Recognising Type			10 min
	Open a discussion on how you can recognise the colour energies in action.	Poll Chat Microphone	• Encourage the participants to share ideas about what they would look out for • Provide understanding about the willingness to understand another person's preference	10 min
01:35	Adapting and connecting			15 min
	Put into practice how they would adapt to connect with the four colour energies. Discuss which of these strategies they could use to strengthen their connection.	Breakout rooms	• Provide understanding about importance of adapting towards another person's preferences • Ask them to think about the person they chose at the beginning of the day and/or what they can do to contribute to the overall team's effectiveness	15 min
01:50	Personal development			10 min
	Pick one action they will take for personal development based on what they learned in today's session	Chat Microphone	• Provide understanding about the need to develop the skill and habit to successfully adapt and connect better with others	10 min

Best practice agenda – online delivery (three hours)

This agenda requires the use of the online pre-work activities

Run time	Agenda item	Tools	Key purpose and focus	Duration
-00:15	Webinar setup			15 min
	Check participant audio and visual setup is working.		• If possible, add an extra 15 mins to the three-hour session to ensure everyone can set up audio and visuals • Taking this time can avoid potential technology issues once the session begins	15 min
00:00	Getting started			20 min
	Objectives.	Chat Microphone	• Position the session and provide space to note any questions which might have come from the e-module and pre-work	10 min
	Who would you like to improve your relationship with?	Paper and pencil	• Ask your participants to 'pick their person', i.e. write down the name of someone in their life who they would like to improve their relationship with • Tell them to keep this person in the back of their mind during the session	2 min
	'Who am I?' activity.	Chat Microphone	• Ask participants to write down ten sentences that starts with 'I am …' on paper. When they are done, ask them to share a few examples in the chat • Ask them what reflections they can see when looking at the different answers in the chat. If time will be limited this can be a quick exercise using chat only with three sentences	8 min
00:20	Perception			10 min
	Review perception from e-learning module and general discussion about (or description of) perception. Understanding that perception is the way in which we regard, understand, and interpret the world and our perception is unique.	Chat Microphone	• Remind participants about the old lady/young lady exercise in the e-module. Do perception scenario and the ladder of perception based on the team's objectives and/or spend more time on one of the exercises	10 min
00:30	Colour energies			20 min
	Overview of the Insights Discovery colour energies.	Chat Microphone	• Remind participants of the pre-work e-module • Build an understanding that we all have the four colour energies within us, and we can use and develop each one of them	20 min

Run time	Agenda item	Tools	Key purpose and focus	Duration
00:50	Jungian Preferences			20 min
	Choose different exercises to self-estimate own preferences to gain self-awareness. Overview the different preferences and how they show up in the colour energies and the Insights Discovery wheel.	Annotate Chat Microphone	• Remind participants of the pre-work e-module • Build an understanding of the preferences and how they show up in the colour energies	20 min
01:10	Introducing the Insights Discovery Personal Profile			75 min (inc. break)
	Overview of profile. Introduce face validity exercise.	Chat Microphone	• Introduce the profile • Describe how to calculate face validity (done during break)	5 min
01:05	Break			30 min
	Share face validity results Describe the evaluator and the graphs.	Poll Chat Microphone	• Understand the graphs page of the profile	10 min
	Small groups share parts of the profile with each other.	Breakout room	• Breakout rooms with 3-5 to share overview statements, their graphs, perhaps what their Preference Flow story might be and share one strength that shows up at work	20 min
	Review the Insights Discovery 72-types wheel and review the team wheel.	Chat Microphone	• Build understanding of the factors that determine an individual's wheel position for their conscious and less conscious graphs • Understand how the colour energies appear in their team	10 min
02:25	Recognising Type			10 min
	Open a discussion on how you can recognise the colour energies in action.	Poll Chat Microphone	• Encourage the participants to share ideas about what they would look out for • Provide understanding about the willingness to understand another person's preference	10 min
02:35	Adapting and connecting			15 min
	Put into practice how they would adapt to connect with the four colour energies. Discuss which of these strategies they could use to strengthen their connection.	Breakout rooms	• Provide understanding about importance of adapting towards another person's preferences • Ask them to think about the person they chose at the beginning of the day and/or what they can do to contribute to the overall team's effectiveness	15 min
02:50	Personal development			10 min
	Pick one action they will take for personal development based on what they learned in today's session.	Chat Microphone	• Provide understanding about the need to develop the skill and habit to successfully adapt and connect better with others	10 min

01 Getting started

Learning outcomes

- Set expectations and context for the workshop

- Get to know fellow participants

- Create agreed rules of engagement

Section overview
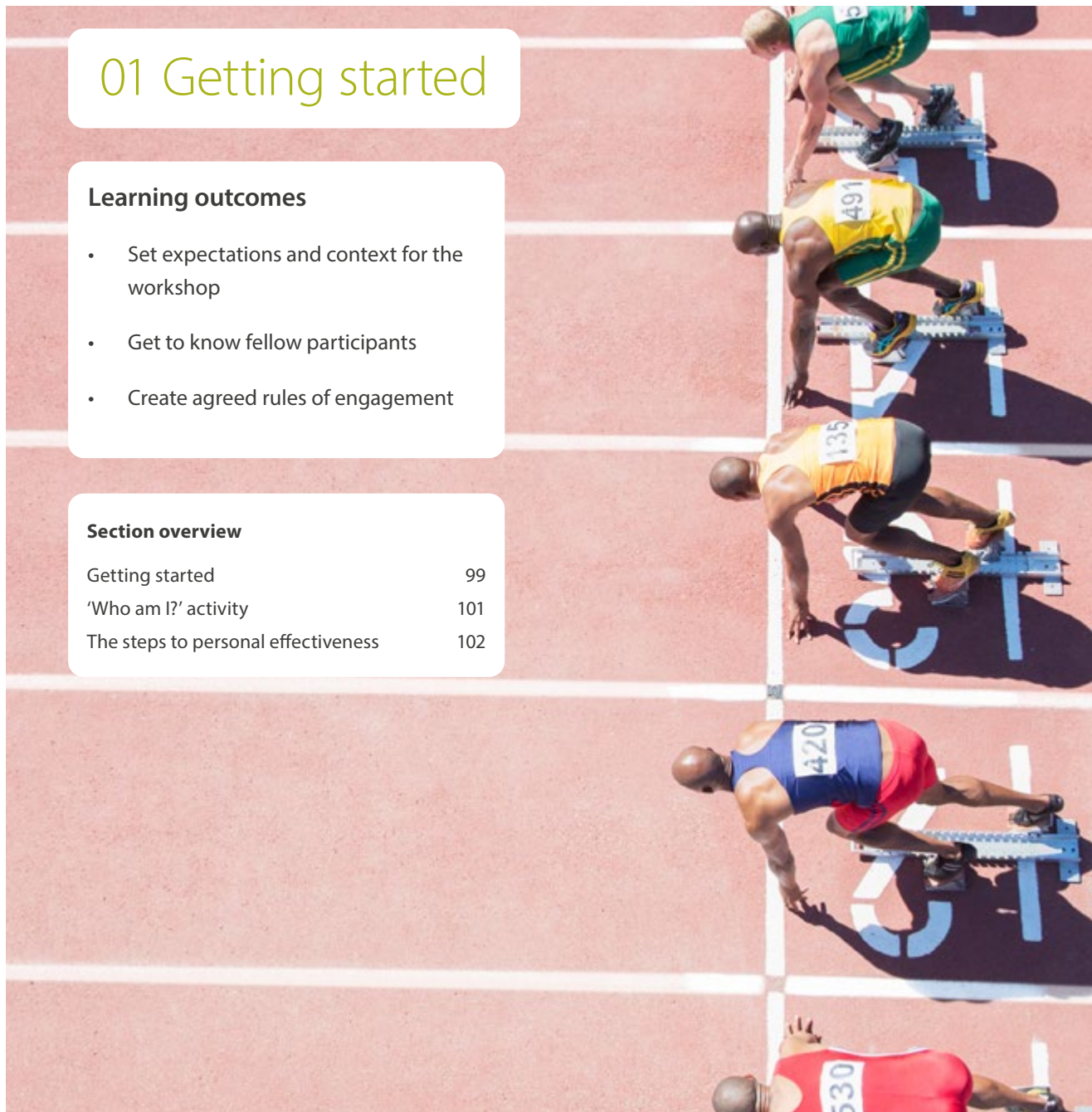
Getting started

Welcome and positioning.

Why do this?

To help your participants understand what the session is about and to create a little context

How to run it

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.

Insights Discovery

If you think it would be useful for your participants, you can start your session by introducing these core concepts of Insights Discovery. This can help to introduce why they're here and emphasise that the model is based on Jung's work.

Objectives and learning outcomes

Update these slides based on the objectives and outcomes for the specific session you are running. There is also an opportunity to add to these live within the session. Just ask for input from your participants!
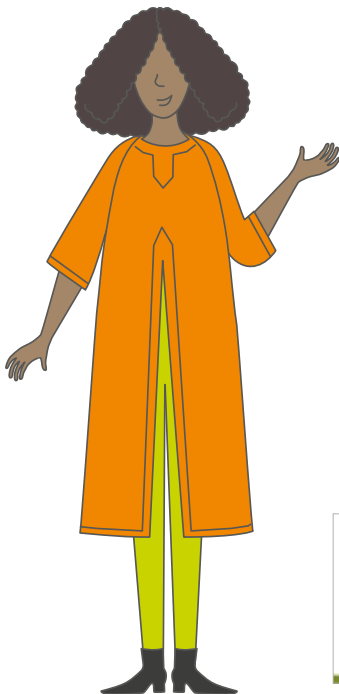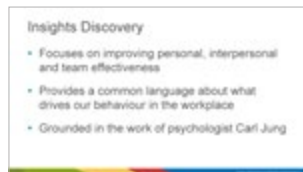
Today is about connections

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

Ask your participants to 'pick their person'. Write down the name of someone in their life who they would like to improve their relationship with.
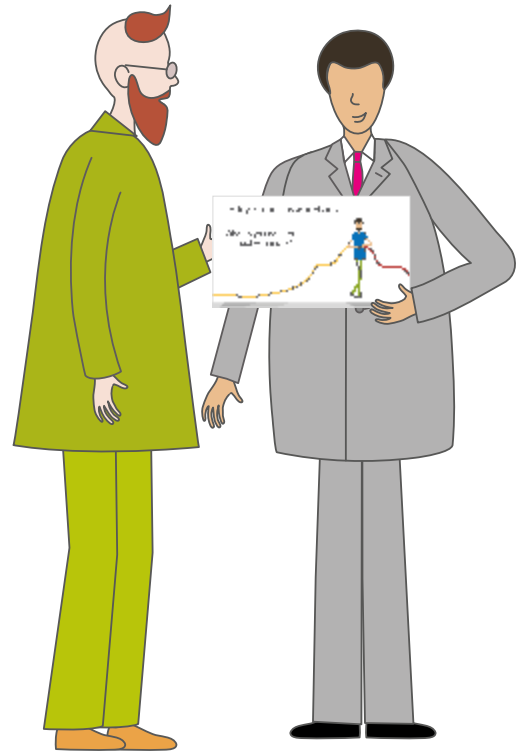
'Who am I?' activity

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 answer the question ten times, by writing the prompt 'I am …' and then finishing the statement.

Ask participants to share some of their answers in the chat so that we may get to know who is in the room.

Ask the group what they notice about the answers (e.g. some may be about roles, some about characteristics, some more surface level, some deeper)

Today's session explores additional aspects of who we are.
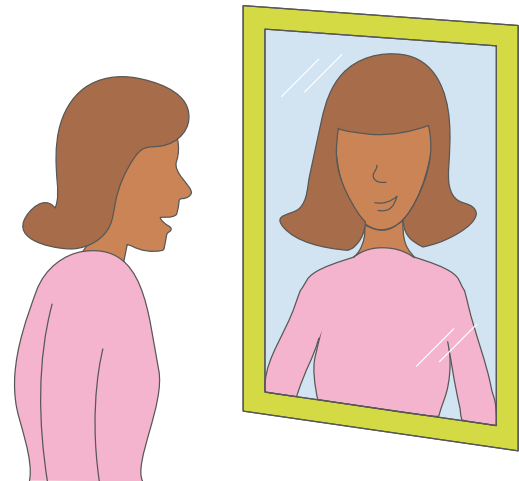
The steps to personal effectiveness

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 session.
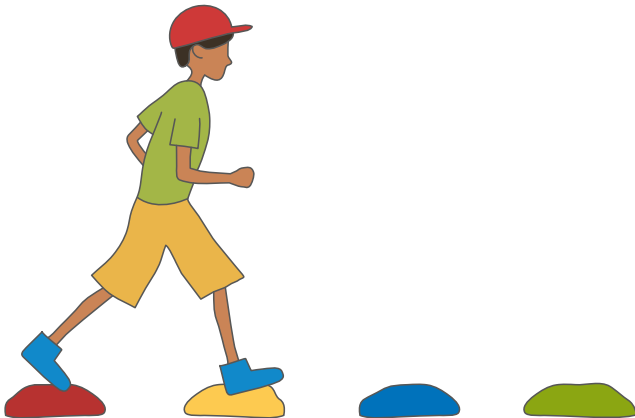
02 Perception

Learning outcomes

- Appreciate that our perceptions can be different from those of others

- Understand how perceptions are formed

- Awareness of how judgements about different views can be the source of misunderstanding and challenges in relationships

- Awareness of how our perceptions can be changed

Section overview

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 lesson 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

Start with a general discussion about perception. How would you define perception? Where do perceptions come from? Ask your participants to type responses in the chat or share using their microphones.

Show the old lady/young lady slide, remembering that this will have been featured in the e-learning module that you might have used for pre-learning.

Start by asking 'What can you see?' to allow open exploration. You can use a poll to explore different perceptions of the old lady/young lady image.

If your participants have seen this image before, that's a good thing! It means that you can explore how often we feel like we've seen our workplace before. It can leave us complacent and we stop looking for more information. Throw in a challenge. Can everyone see the bird? Or the lion?

Perception

You will see the world differently from the way other people see it.

Perceptions can change, with awareness.
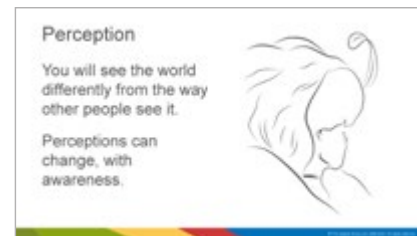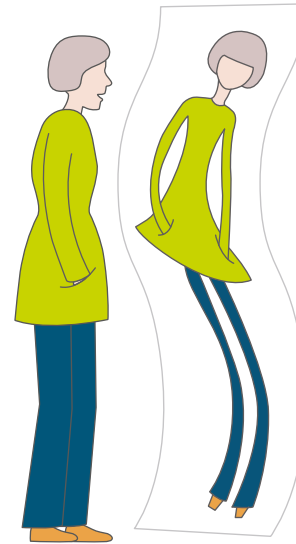
Alternative

Present a scenario or show a video to your participants to explore different, immediate perceptions.

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's 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.

61

19
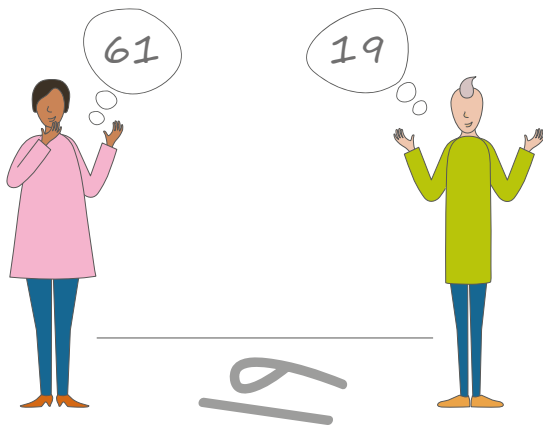
Perceptions impact how we respond to our colleagues, our friends, and our family.

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 or your scenario to demonstrate the process of going up each rung of the ladder.

The event: an objective view of everything in the situation

My perception: the information I choose to select from the event

Value judgements: evaluation of my perception based on my own personal values

Intepretations: looking at the possibilities of what this could mean

Logical conclusions: the conclusion I make based on the interpretations I've drawn

Responses: the physical and emotional responses I feel based on my conclusion

Beliefs: the belief I form and carry forward to inform all future situations that are similar or involve the same individual

Action: the final step and the part that others will see, what I decide to do based on the story I have told myself

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. Talk about how we can change our perceptions. 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).	Allow participants to criticise one view over another – encourage acceptance of all views. Show more than two or three images. You can lose the key lessons and become fixated on solving the picture puzzles.

03 Colour energies - part one

Learning outcomes

- Your colour energies are a filter for how you perceive the world, the people in it and your relationship to them

- 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

- Appreciation for the dynamic nature of the opposite energies

- Awareness of respectful use of the common language (e.g. valuing/honouring/inclusion vs. labelling/stereotyping/isolating)

Section overview

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? Ask the participants to write down six words that describe them well.

Progress the slide to show how each of the adjectives relates to colour energies. Ask the participants to note the colour energy of each of the words they listed, then count up how many words of each colour they chose and note the results in chat.

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.

You can explore the mixture that each participant has created. Ask who has claimed words that were all of one colour, who had a mixture of two colours and so on. This supports the future concept that we are a mixture of all four colour energies and that we all have our own relationship with the preferences.
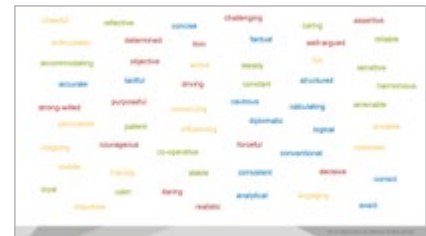
Insights Discovery card activity

Why do this?

- This is an easy way to begin defining the qualities relating to each colour energy

- It will help your participants to understand how the energies might show up in different combinations
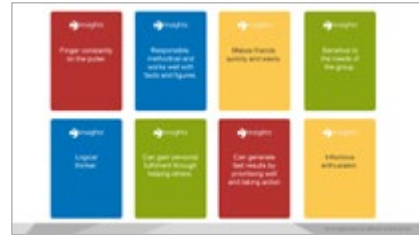
How to run it

If you have used the e-learning module as pre-learning, your participants will already have seen individual words that represent each of the colour energies. This activity helps us to round out our understanding for each of the four colour energies. Remind your participants that we all use all four colour energies, but we are likely to have a preference for one or more above the others.

Display the first row of cards on the slide and ask your group to read them and type into the chat their order of colour energies, from most like them to least like them.

Repeat for the second set of four cards and ask everyone to note whether their colour order is similar or different. This will help to demonstrate that for some our relationship with the energies will vary and for others it will stay the same.

If you're working with a team you can expand this discussion to ask if there are any statements that you might offer to one of your colleagues in the session. Explore the responses with the group.
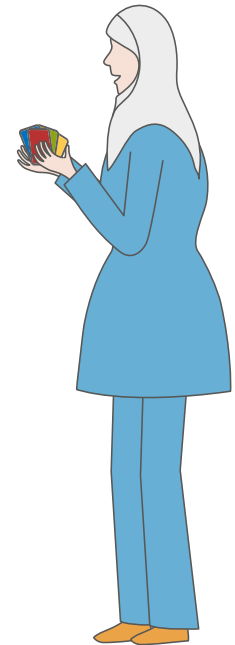
Describing the colour energies

Why do this?

- This is when you expand the foundational understanding of each colour energy

- The opportunity here is to really emphasise the strengths and weaknesses of each colour energy and to allow each individual to connect with how they personally connect with each energy

- 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

How to run it

Beginning with any of the four colour energies (your slides are set to reveal Fiery Red first), give a brief description (or reminder if you've used the e-learning module) of that colour energy. Be sure to describe the energy as something that can be used by any of us, not as a label.

You can draw on the adjectives and card statements used previously to explore each energy further.

Next, show the corresponding checkerboard slide and ask each person to provide an example of how they personally use that colour energy. What aspects of that colour energy do they draw upon, and in which situations?

Your colour energy mix

Repeat this exercise with each of the colour energies. If you move next to Earth Green energy, you can help participants notice the opposite nature of these two colour energies through your descriptions of each. This will help later when you are defining the colour energies using the attitudinal functions and also when you describe how the less conscious graph is derived from the conscious graph.

Next you would describe Sunshine Yellow and then Cool Blue so that you could point out the opposite relationship between those two colour energies.

Ensure you also touch upon the bad day versions of the energies and how they might show up when over-extended. Make the connection to perception – who is it that's having a bad day?

If you would like to expand your descriptions of the colour energies, look at the Face-to-face delivery colour energies section of this practitioner guide.

Your colour energy mix

Once you have described both the good day and bad day characteristics of the colour energies, ask the participants to share in the chat what order of colour energies they think they prefer. Explore whether this is similar or different to the combination they claimed in the adjectives or card activities.

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	Over simplify the model by stopping the learning at people's dominant energy
Use the appropriate supporting materials – e-learning module, blocks, follow-up reference material	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 ways to engage with the colour energies.

03

04 Jungian Preferences

Learning outcomes

• Understand the Jungian attitude and functions and how these relate to the four colour energies

• Create an awareness of your own preference for the attitude, decision-making and perceiving functions

• Create an awareness of how the perceiving functions are present in all four colour energies

• Awareness that the attitude and functions each operate on a continuum, and we all operate within a range on that continuum

• Our strength of preference impacts our view of others (my perceptions of others are relative to where I am in my preference)

Section overview

The Jungian Preferences

Why do this?

- To help participants become familiar with the concept 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 more 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.

Alternative: ask participants to write their first name on a piece of paper and notice how it feels. Then ask them to switch the pen into their other hand and write their name again. Explore how it felt and what the outcome was. Did they still manage to write their name?

In the discussion, explore the idea of practice. If you were injured and unable to write with your dominant hand for a while, would your non-dominant handwriting become easier? When the injury is healed you will likely still revert to your original preference but, with practice, another approach can become easier.

The Jungian preferences

"Every advance, every conceptual achievement of mankind has been connected with an advance in self awareness."

– Dr Carl G Jung

04

Claiming 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

Your attitude - Introversion and Extraversion

Introduce the concept of I/E through the claiming exercise.

Using polls or the annotate function to allow participants to make a mark representing where they place themselves on each continuum.

Once your participants' marks are spread out across the slide, explore how this dynamic might show up in their interactions. If you're working with a team, investigate if they experience this dynamic in their working interactions.

Since Jung's definition of 'attitude' differs from common usage, it may be helpful to share, that in this context, 'attitude' refers to one's orientation to the world, or the way one reacts to experiences. Some people understand it as how we get our energy. There are two attitudes: Introversion and Extraversion.

Those with a preference for Introversion identify more with the words on the left side of the slide, and may tend to orient themselves internally, gaining energy by being alone or with a few close friends. Those with a preference for Extraversion identify more with the words on the right side of the slide, and may tend to orient themselves externally, gaining energy by being around other people and engaging in the world around them. In our model, people are not Introverts or Extraverts, but may have a preference for one of these over the other a majority of the time.

In our model, Cool Blue and Earth Green are the Introverted energies, while Sunshine Yellow and Fiery Red are the Extraverted energies.

The decision-making function
– Thinking and Feeling

Repeat the exercise using the Thinking and Feeling statements on your slide.

Once your participants' marks are spread out across the slide, explore how this dynamic might show up in their interactions. Make sure it is clear that this is specifically related to the process of making decisions. If you're working with a team, investigate if they experience this dynamic in their working interactions.

Those with a preference for Thinking identify more with the words on the left side of the slide, and may make decisions through a logical rationale by using knowledge or objective facts.

Those with a preference for Feeling identify more with the words on the right side of the slide, and may tend to make decisions and judgements more subjectively based on personal values and who will be impacted by the decision. In our model, people are not Thinkers or Feelers as we all use both, but we usually have a preference for one of these over the other.

In our model, Cool Blue and Fiery Red energies are the Thinking preference energies, while Earth Green and Sunshine Yellow are the Feeling preference energies.

Your decision making 'functions'

Thinking   Feeling

04

Key lessons from the claiming exercise

It is likely that most of us claimed a range of preferences, 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 group.

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

Jungian Preferences and the colour energies

After you have described the decision-making preferences and how they connect to the colour energies, ask participants to consider which preferences they claimed during the exercise. This may link to their dominant energy, and even if it is not, it is likely to be an energy they can connect with quite well. This is because each colour energy is a combination of either Introversion or Extraversion, and either Thinking or Feeling.

Click through the slide to review and confirm how the Jungian preferences combine to form the four Insights Discovery colour energies.

The next slide then offers some colour energy descriptors. This can help your participants to see how the combination of preferences lead to different types of behaviour.
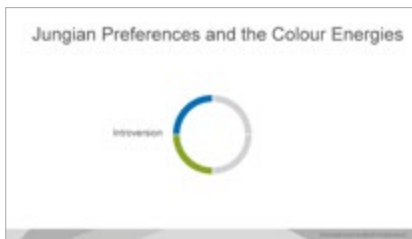
The perceiving function

Why do this?

- To help participants appreciate the perceiving function of Sensation and Intuition

- To explore how Sensation and Intuition can show up in every colour energy

How to run it

Show the slide image (or equivalent) and ask the participants to write down what is there for them. Volunteers share what they have written. Remember that, for those who have completed the e-learning module, this will be a review rather than an introduction. 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 slides, expand further on the differences between Sensation and Intuition. This is about how we perceive. According to Carl Jung, there are two ways that we take in and process information. We either use our five senses to see, hear, taste, touch, or smell what is actually there; or we use our 'sixth sense' of Intuition. Those with a preference for Sensation may connect more with the words on the left side of the slide, while those with a preference for Intuition may connect more with the words on the right side of the slide. As with the other preferences, we all use both, but probably have one that we use more than the other when we are taking in and processing information.

If you don't want to use an image there are other options to explore these concepts. You could simply ask your participants to look at the space around them and tell you what is there for them. Or ask them to write about a snowman and share their results.

Exploring Sensation and Intuition through the colour energies

Sensation and Intuition exist within all four of the colour energies. Our preference for how we process information can mean that our use of the colour energies is experienced as different to someone else using the same energy.

If time allows, it's helpful to use these slides to explore how Sensation and Intuition can impact our use of the colour energies. 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.
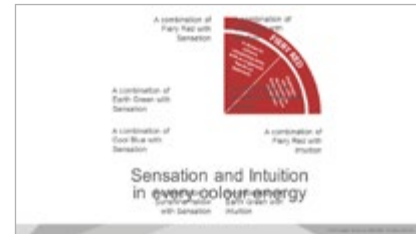
Summary of the Jungian Preferences

Use this slide to summarise the preferences and check understanding before progressing your session.
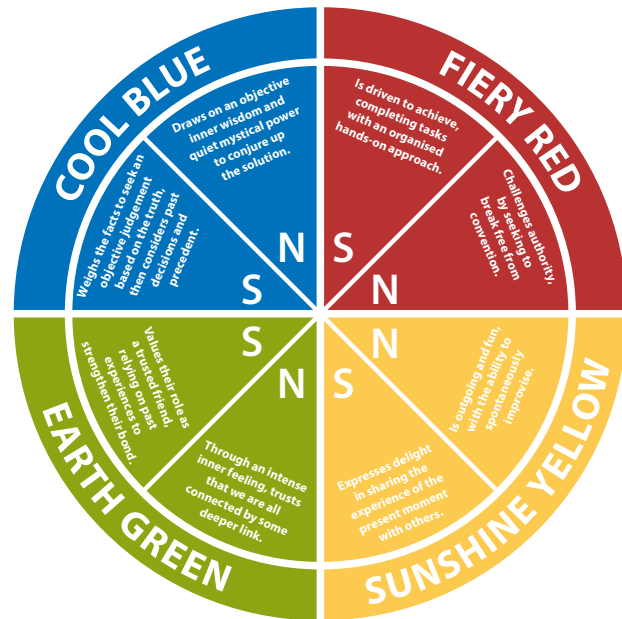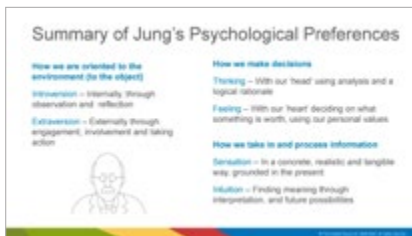
Practitioner tips on preferences

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

05 Introducing the Insights Discovery Personal Profile

Learning outcomes

- Create an appreciation for the accuracy of their own profile

- Understand the key concepts of the graphs and wheel

Section overview

When to share the Insights Discovery Personal Profile

Things to consider

When running a session online, there might be concerns regarding network connectivity or time that impact the ability to share the profiles during your session. You will know what's right for your group but here are our suggestions:

Option 1 (three-hour session)

This is the time to email profiles to the participants. Let them know that you would like them to read the overview section of their profile and complete a short assessment of the face validity of the profile, which is described on the next slide. They will have 20-30 minutes to do this and take a short stretch break, and then return for the second portion of the session. Before the break, move to the next slide.

Option 2 (two-hour session)

If profiles were sent out prior to the session, provide instructions to participants to complete the face validity process before joining. Also, ask them to identify some key statements they would like to share from their profile. After the break, you can begin by asking participants to answer the poll representing their face validity and move on.

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.

Invite the participants to read the overview section. If you're running a slightly longer session, you can set this activity immediately before a break.

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 by reading the overview pages of the profile. As the participants read these pages they put a mark against any statements that they believe does not describe them. 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.

You can use a poll to capture the range of results from the group.

Review the Overview (pages 6-8)

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.

If required, use the optional evaluator slide to refresh the steps in the evaluator and how it now reveals within the pages of their profile. Explain briefly that the evaluator has multiple frames, each with four statements. Each statement relates to a different preference. For each statement in the evaluator, you indicated a MOST like me, a LEAST like me and then scored the remaining two pairs 1-5. Most like me scores a 6, least like me scores zero. The average score for each colour energy is used to create the Conscious Graph.

Conscious and Less Conscious persona

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 social media; you have chosen them and want to share them with your 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 social media world sees you. This is like your less conscious graph."

Explain the mid-line; on either graph, colours above the mid-line suggest an inclined usage, colours below the mid-line suggest a less inclined or even possibly a reluctant usage. (Distance from the mid-point is significant!)

Remind participants that because a colour energy is your lowest, does not mean that you cannot effectively use that colour energy; it just means that it will take more effort, and you may not want to put in this effort for a sustained period of time.

The evaluator only measures preference for the colour energies, not how capable you are at using the colour energies. This is why the Insights Discovery profile should not be used to determine the actual job or role someone has (e.g. you have dominant Sunshine Yellow energy, therefore you should not be an accountant). Personal effectiveness comes through acknowledging our preferences, and using that awareness to pull on our least preferred energies when we need to, in increasingly effective ways.

Preference Flow

Colour Energy graphs – dynamics

- We can put energy into expressing more of a particular colour energy, in which case the bar will be shown moving in an upward direction. Or we can put energy into suppressing some of our less conscious energy which is shown by the bar going down

- We can explain objectively how the movement takes place between the graphs, we cannot begin to explain 'why'. Only the individual themselves will have the correct insight into what is going on in their Preference Flow and graphs

- Ask the group for some thoughts on what may cause the Preference Flow to flex; draw out their ideas then summarise by saying it could be any of those things, as well as many more

- Bring it back to the photo analogy: what are the adjustments you make when you realise a camera is pointed at you? Only you know why you make them but they're right for you. All of those micro adjustments are what's captured in the Preference Flow

- End this explanation by saying that in reality the Preference Flow is dynamic rather than static, as we adapt to the needs of numerous situations throughout each day. What we are seeing therefore is a snapshot at a point in time when they filled in the evaluator

Breakout rooms

If you have time, put participants into smaller groups to discuss their initial reactions to their profile. You can choose the questions to ask groups to discuss. It may be sharing a strength or value to the team statement, or maybe focus on communicate strategies and barriers. You may also want to invite participants to share from their graphs and perhaps what their Preference Flow story might be. Select an area that fits with the objectives of the session.

05

The Insights Discovery wheel and your wheel position

Ask the individuals to turn to the wheel page in their profile. Then build the wheel, highlighting with simple explanations the quadrants, Eight Types, spokes and the three rings of the wheel (focused, classic and accommodating). There are slides available that help to demostrate the rings and grey spokes if they are helpful.

Share that only two factors determine an individual's wheel position for either their conscious or less conscious graphs – *the order of the colours and how many are above the line*.

Someone may say "I only have one pie graph". You then have the opportunity to explain that in some positions, the order of colours and the number above the line do not change between the conscious and less conscious graphs, so these pies are on top of each other.

Your wheel position can be thought of as your 'home address' on the Insights Discovery wheel. There might be others that live in the same location as you but your own home is very specific to you. When visiting someone that lives in the same place you might know roughly what to expect from each other. However, you can also visit others that live elsewhere, you might just need to consider the route you're going to take to get there.

Share open discussion about participants' wheel positions.

What examples do you have of behaving from your conscious wheel position?

When do you respond from your less conscious position (where it is different)?

When is your behaviour not consistent with your wheel position? Why?

Would anyone who knows you be surprised by your wheel position?

Your Insights Discovery wheel position

Why do this?

- Demonstrates the range of wheel positions within the group

- If working with a team, it's an opportunity to understand the range of preferences within the team

How to run it

Ask participants to use the annotate function to add their initial to their Conscious wheel position on the slide image. Alternatively you can show the pre-prepared team wheel.

This presents a great opportunity to open up for discussion or profile sharing, dependent on how you have structured your agenda.

Try not to allow the discussions to remain at only the dominant colour energy level, encourage your participants to consider their entire energy mixture.

Plot your own position on the wheel

Practitioner tips on introducing the Insights Discovery Personal Profile

Do	Don't
Make sure participants have time to explore their profile and think about how they will use the information professionally and personally. Keep your explanation of the graphs and wheel simple. Stick to information that will be beneficial to your participants using the profile effectively. Encourage participants to capture key learning points to recall what the graphs and wheel represent.	Overwhelm them with too much detail or theory. Forget they are 'Beginning the Journey', not attending an IDA! Forget to use the text available to you in the profile; expand beyond the overview, graphs and wheel pages.

06 Recognising Type

Learning outcomes

- Develop an awareness of the different clues or signals people demonstrate in their behaviours that highlight their preferences for the different colour energies

- Consider various people and how they use each of the four colour energies, and understand the importance of looking for the behavioural evidence

- 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

- Begin to formulate how you might use this information to better connect with individuals who are different from you

Section overview

Recognising type

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.

Four boxes (optional exercise)

Create four boxes or whiteboards, one for each colour energy and ask participants to write down clues related to body language, verbal style, interactions that would give clues that somebody was using each colour energy. This can be done in the chat if boxes or whiteboards are not possible.

06

Recognising types (preferences)

Summarise this section by asking participants to think about one, two or three people they want to improve their relationship with (if you did the exercise at the beginning where they 'picked their person', ask them to think of that/those individual/s now).

Using the steps on the slide, ask participants to consider what they experience from that individual. This will allow them to determine a possible dominant colour energy.
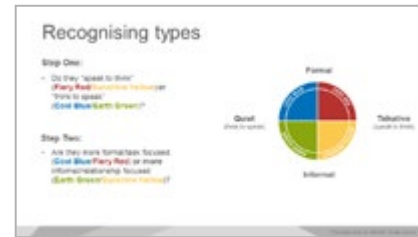
Watch my back (optional exercise)

If working with a team of less than ten and time allows, this is a chance for the team to provide feedback about which colour energies they experience most often in each other.

If possible, set up boxes or a whiteboard with a section available for each colour energy. Alternatively, use a slide with the annotate function.

Working with one team member at a time, asks the team to type their initials on the screen next to the colour energy quadrant or quadrants that they experience most often from that individual. It is most useful if you ask for several individuals to provide examples to support the colour energy or energies they selected in the other person.

You may suggest that individuals could take a screenshot of the feedback before it is cleared for the next individual.

Be the detective

Ask participants to review the example communications and share which colour energy they believe it represents.

Be sure to emphasis that these are stereotypical examples but they will help us to practise recognising the clues that might emerge. During the discussion help participants to identify what clues they used to draw their conclusions.

Discuss with the group the benefit of knowing how to guess at someone's preferences. Think about project teams you work on, other colleagues you work with regularly. Maybe you want to consider your family or close friends? Use this information to then come up with small (or not so small) changes you can make to better interact with the individuals and the collective, based on your own self-awareness of your style.

Be the detective …

Email communications

What clues might indicate the sender's style?

Practitioner tips for recognising type

Do	Don't
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'. 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). Emphasise the need to remove your own filters (projections) to effectively recognise type. 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.	Allow participants to label people as 'red' or 'blue'; encourage respectful language. Allow any stereotyping. Allow people to use their colour energy preferences as an excuse for bad behaviour.

06

07 Adapting and connecting

Learning outcomes

- Practise the skill of adapting and connecting your style to someone else's, using more or less of each of the colour energies to effectively influence

- 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

- Develop an appreciation for the persistence and patience required to make effective adapting and connecting a habit

Section overview

Introduce concept and tips

Why do this?

- These concepts are easy to understand but the skillful application of this knowledge can be quite difficult; practice is vital.

How to run it

Discuss with participants the idea that once we have an estimate of someone's dominant colour energy, or even their likely eight type, we still in fact need to do more to better connect with that person. We need to actually make small shifts in our behaviour so we better meet their needs. Discuss the importance of having the right mindset for adapting and connecting, and the importance of authenticity.

What is the right mindset for better adapting and connecting?

Optional exercise: Either through use of breakout rooms or in chat, ask participants to come up with strategies on how they would connect with the colour energies. You may want to share at this point that they can refer to the Insightful Strategies job aid (which could be shared either with the pre-work email or as a document in Chat).

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 – understanding what colour energies you may dial up (or down) to meet the needs of the individual or situation. This will do wonders for improving your ability to connect.

Match my style exercise

Why do this?

- This exercise gives participants an opportunity to practise their ability in adapting their behaviour to suit different styles – key in any influencing situation

How to run it

Choose topics that are specific and related to the business or team, e.g. if you are working in a pharmaceutical company find a scenario that relates to that world, such as selling a drug to a medical professional.

This activity can be run using breakout rooms or together as a group.

Try to match partners with different preferences (either dominant or their colour combination behind their dominant).

One individual is the influencer and the other individual is being influenced – swap these roles for each round.

The influencer is given one minute to adapt and connect with their partner's colour energy preferences and see if they can influence them to whatever scenario you have chosen.

At the end of the activity discuss how each individual found the experience and what they learned.

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.

Note:

For more content, there is a section on Adapting and Connecting in the Discovering Team Effectiveness workshop journal.

Practitioner tips for adapting and connecting

Do	Don't
Make it practical; have participants commit to action on at least one thing. Let participants know this is an easy concept to understand and, like any skill, takes a lot of practice to do well. Remind participants that one of the most important factors in connecting to someone else is the true desire to do so. Emphasise the importance of being authentic in interactions – adapting and connecting is NOT about being something you are not (this is the chameleon principle – even though they change colour they are still a chameleon).	Dwell solely on the four colours; consider the Eight Types. Think just one session will change behaviour; this skill requires commitment and follow-up.

07

08 Action planning

Learning outcomes

- Create a goal with a strong action plan related to the workshop's activities

- Through listening to the goals of others as they are shared, become aware of additional goals that may be worth pursuing

Section overview

Action planning and close

Ask the participants to take turns and share the action they have committed to with the group. (This can be particularly powerful for a team.)

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.

Additional resources

Share the supporting materials participants have to take away.

If you have specific homework or follow-up based on the learning objectives for this session, explain them here.

Practitioner tips for Action Planning

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

08

Teach-backs

Teach-backs

Note down any key lessons from the teach-backs.

Perception:

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Graphs:

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Colours:

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Recognising Type:

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Preferences:

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Adapting and connecting:

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Creating an Insights learning environment

Section overview

It is really important to take time to consider the learning environment you are creating, whether that is face-to-face or online. Preparation goes beyond ensuring you know your content, materials and what you will say. There are many additional factors to consider to ensure a successful learning experience, like room set-up, the people in the session and how you 'show up' in the room. These factors can contribute as much to the success of your session as high-quality materials and the great conversations you will spark.

As you consider the physical or online space and how you set up the room, you are better able to cater to the needs of your participants. Ensuring their physical comfort reduces unnecessary distractions. How can you best manage the space? How can you ensure they are comfortable and familiar with any online or digital tools you include in your session?

Looking at the attendee list for your session and understanding a bit more about the individuals (and the team dynamic, if they are a team) gives you the opportunity to tailor your delivery in a way that will be most relevant to your participants.

How you deliver your facilitation will be as important as what you deliver. How do you show up when you are facilitating a group?

Let's consider each of these individually.

Physical room set-up

- The room set-up should be informal and inviting. Natural light can make a huge difference in your participants' energy levels

- Look around the walls of the room you will be in. Is there space to add posters that inspire your delegates and create focus for the session? (We like using motivational quotes, or our purpose statement.)

- Arrange the seats in an open circle around a 72-type Insights Discovery wheel mat. Keep the floor space free of clutter to allow for ease of movement. We like to avoid tables if we can, though balancing a hot drink on a lap can be awkward, so ensure your participants' comfort and safety, whilst creating an open space

- There should be ample space for breakout activities, such as coaching and small group work

- A projector and screen should be positioned so slides are clearly visible

- We also suggest four flip charts – one in each corner of the room to represent a colour energy. Set up the flip charts with the Fiery Red one to the right of the screen. Move clockwise around the room with Sunshine Yellow next, Earth Green opposite to Fiery Red, and finally Cool Blue at the left of the screen, opposite to Sunshine Yellow

Flip chart

Flip chart

Screen

(Slides should be clearly visible)

Projector

72-type wheel mat

Colourful posters bring concepts to life

Natural light boosts energy levels

(Room should be informal and inviting)

(Ample space for breakout activities)

Seats arranged in an open circle

Flip chart

Flip chart
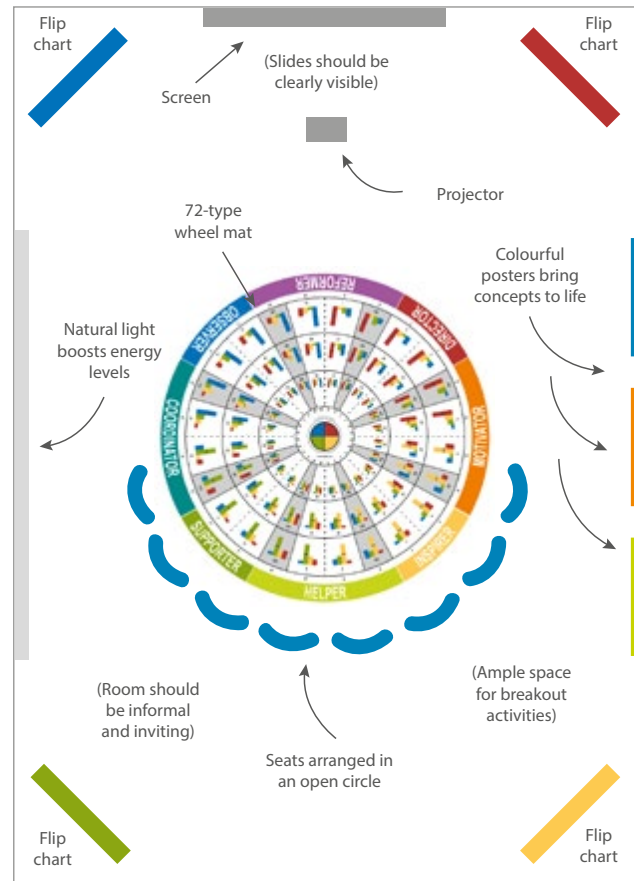
Online room set-up

There are many things that you can consider to create the best learning environment for your participants.

Your technology platform

- Webcam and computer audio
- Chat
- Raise hand and feedback
- Breakout rooms
- Whiteboard with annotation
- Screen sharing

Your content and people

- Co-facilitator with clear roles and responsibilities
- Technical producer
- Slide deck
- Participant materials
- Structured breaks
- Your participants

You and your studio

- Preparation
- Family, co-workers and pets awareness
- Silent background
- Dual monitor awareness
- Visual appearance
- Lighting for camera; studios

Facilitator homework tips

What homework should you do as a facilitator on the group you're working with? Some suggestions are to:

- Look at the graphs and wheel positions for your delegates. Look out for any unusual or surprising graphs that may generate questions.

- Create their team wheel and consider the implications. (Remember to consider the levels of all four colour energies per individual!)

- Consider what the learning styles of the group are likely to be and how you will tailor your delivery accordingly.

- Have a clear purpose for the workshop.

- A discussion with the sponsor would be advised to ensure your workshop design will meet the learning needs of the participants.

What else might you do? How could you get some information about what's happening for these individuals? Can you speak with the team leader in advance to learn if there is a major project stressing the team out or a recent addition to the team?

What other information could you easily gather about the people who will be in your room?

Facilitator presence

We said right at the beginning – you matter! Your presence in the room throughout the day is vital to the success of the workshop.

We encourage you to consider this model, as you think about different elements that make you a successful facilitator.
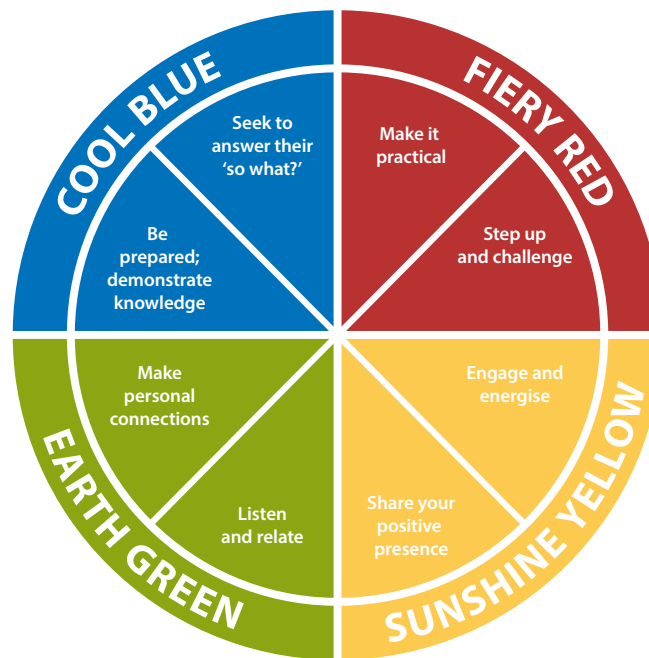
Be self-aware

"What you do speaks so loudly that I cannot hear what you say."

– Ralph Waldo Emerson

Using Cool Blue energy in facilitation

Be prepared to demonstrate knowledge/seek to answer their questions

- How can you ensure you're well prepared with a robust plan and clear understanding of objectives?
- What do you need to do to ensure you know the theory and application sufficiently well to answer your delegates' questions?
- How can you use your knowledge, expertise and experience to help participants get meaningful results?
- What will help you to stay curious in seeking answers to help move this group forward?

Using Fiery Red energy in facilitation

Make it practical/step up and challenge

- How can you relate the information to their world and the challenges they face every day?
- How can you help identify the right actions and plans to actually make a change?
- How will you challenge your participants in their understanding and application?
- How will you encourage participants to stretch all aspects of their development?

Using Earth Green energy in facilitation

Listen and relate/make personal connections

- How can you ensure you listen to what is being said and acknowledge participants so they feel heard and understood?
- How can you appreciate what's not being said?
- How will you maintain awareness of how your personal preferences are influencing your facilitation?
- What personal insights or stories can you share that will further your participants' understanding?

Using Sunshine Yellow energy in facilitation

Engage and energise/share your positive presence

- How will you facilitate a meaningful and engaging discussion for your participants?
- How can you inspire others and help them connect to the content being delivered?
- What will ensure that you bring positive energy to the room when you are working and facilitating?
- How will you connect with the needs of the people in the room and have a positive impact on them?

What are your strengths?

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How do you use each of the colour energies in your facilitation style?

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Where do you need to focus more attention?

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So, that's it!

We hope we've given you all the information
you need to deliver an engaging, enriching **Insights
Discovery – An Introduction workshop.**

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

We believe you will be!

insights®