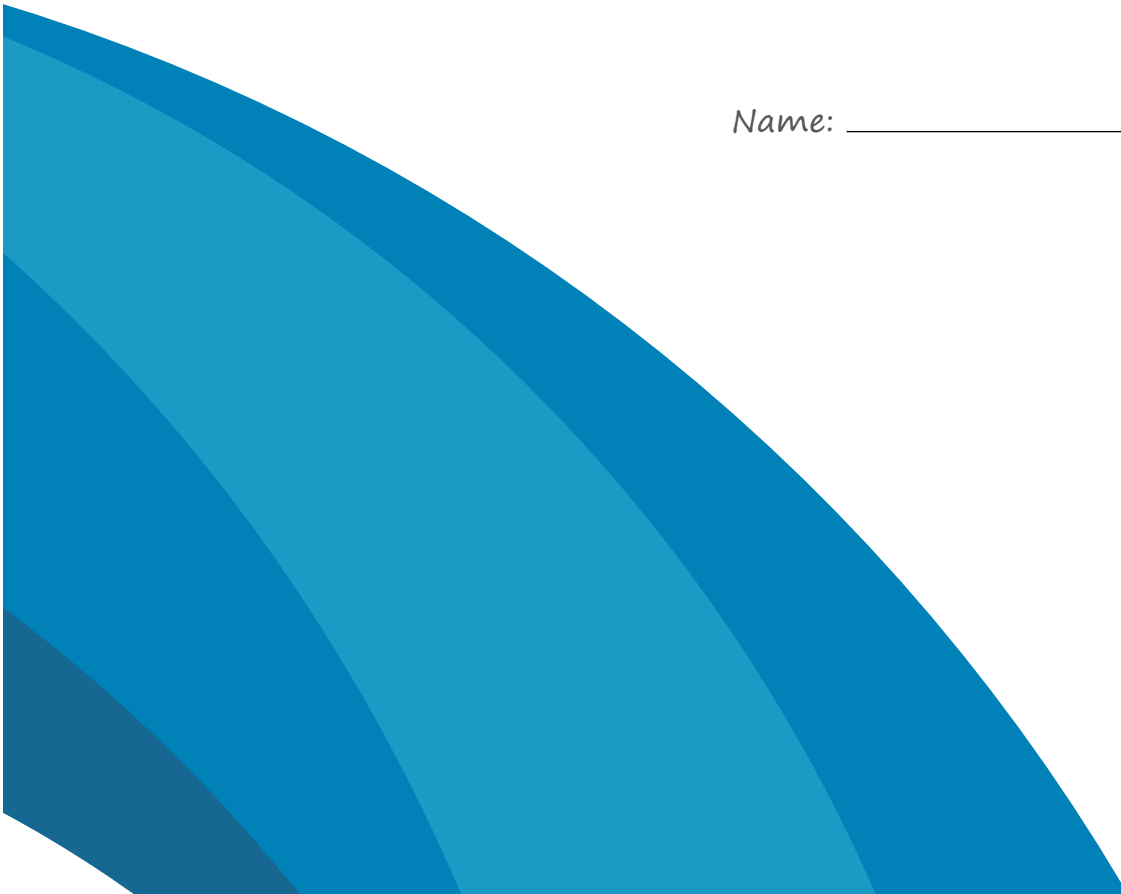


Insights Discovery Accreditation

Working with the Insights Discovery Personal Profile

Name: _____



Working with the Insights Discovery Personal Profile practitioner guide

This practitioner guide shares the best way to introduce an Insights Discovery Profile to someone in a one-on-one setting, and offers ways you might maximise the impact of the profile with your recipients, whether in a group or individual experience. We take a look at each section, each page, of the Insights Discovery Profile and offer an overview of what you will find there, hints and tips in using that with your participants, and questions you might ask to create engaging discussions. We hope this practitioner guide inspires you to think about how to make the most effective use of the Insights Discovery Personal Profile, whether working one-on-one, or with a group.

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A photograph of two young women in a library setting. The woman on the right is smiling and looking towards the woman on the left. She has dark hair in a braid and is wearing a dark top with white stars. The woman on the left is seen in profile, wearing a light blue shirt. Bookshelves are visible in the background.

01 Breakthrough conversations

Section overview

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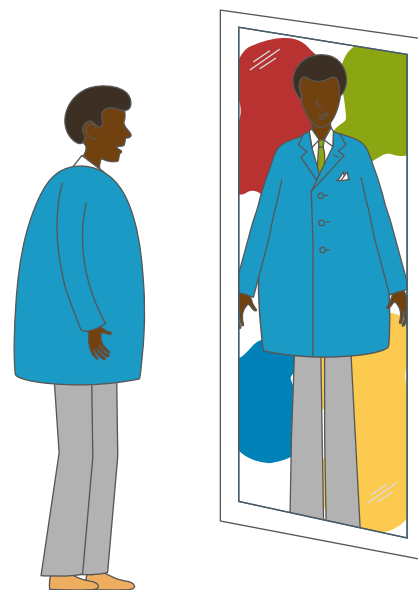
When the recipient reads their profile they may experience a shift in their self-awareness. They may suddenly gain understanding about why they think, feel or behave in certain ways. They can also gain understanding about why others think, feel and behave differently and why this may previously have been a source of conflict. As a practitioner, working with these new personal insights is a great opportunity to effect personal change.

Personal breakthroughs will come when the recipient has a change in perception which has an impact on how they respond. And once their perception has shifted, it is likely to be a permanent shift. One way to tell if a personal breakthrough has occurred is that behavioural change happens naturally. We all know the feeling of having to put a lot of conscious effort into making change and this is rarely sustainable for long; we typically revert back to old patterns. Personal breakthroughs change us at a deep level and result in new patterns being established.

Breakthrough conversations also need to be fully authentic. That means the recipient feels fully able and willing to:

- express themselves openly
- explore their thoughts and feelings
- look at their behaviours with curiosity and appreciation

As the practitioner, you have an important role to play in creating a safe space for this to happen. To begin with, coaching with the profile will address an individual's use of the colour energies and how they can improve their personal effectiveness. The extent to which you are confident and capable to offer coaching on other topics, using the profile as a catalyst, will depend on the knowledge and experience you bring with you. We know the Insights Discovery Personal Profile is a powerful tool that provides great learning for the individuals receiving it.



In coaching the Insights Discovery Personal Profile, there are three key stages to consider. For simplicity, we'll call these stages:

- Before
- During
- After



Before

Establish context and objectives
Prepare approach
Consider potential questions

During

Introduce Insights Discovery model (including perception, colour energies and Jungian Preferences)
Review personal overview (do face validity check)
Review colour graphs and wheel
Identify strengths and weaknesses
Review effective communication section
Consider suggestions for development
End with action planning

This process assumes the person is new to Insights Discovery. Amend it if you're working with someone who has already experienced Insights Discovery.



After

Check in
Establish next steps
Plan for future session(s)

Before

1. Establish context and objectives

- Define the purpose of the session: is it for personal coaching, is it to address a specific challenge or goal, or is it to get up to speed with the rest of the team who previously experienced an Insights Discovery session? Where possible connect with the client prior to the session and ask them what they would like to get out of it.
- Consider how you will position the session. Think about the needs of the client and what you need to say to them to introduce Insights Discovery.

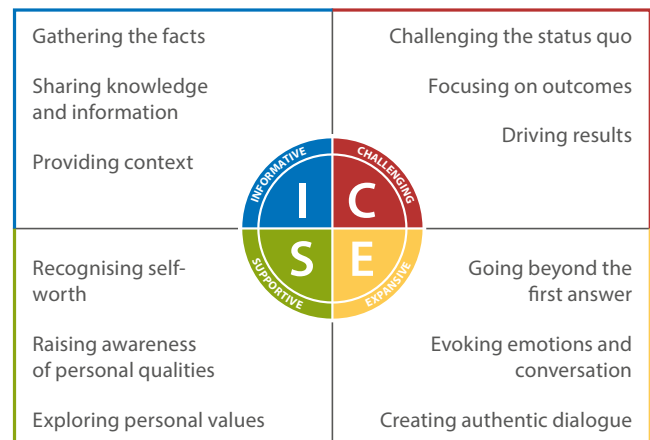
2. Prepare your approach

- Determine how to structure the session. Establish any time constraints and make sure you spend time on the most important things to achieve their objectives.
- Identify what other resources you need, e.g. workshop journal, blocks, cards. It is possible to coach just with the profile on its own but additional resources can be useful as a learning aid and/or visual reference.
- Review the client’s profile and look for any potential challenges. It’s prudent to read over the key points in their profile and review their graphs. Doing this can help you pick out any potential areas of challenge.

- Consider the client’s colour energy preferences and determine how you will adapt your approach. Once you know how their colour dynamics, compare with your own; you can get clear on what you need to focus on to be successful in adapting and connecting.

3. Prepare potential questions

- The ICES model is designed to help practitioners consider a variety of questions to ask their profile recipients. Our own preferences may impact on how comfortable we are asking questions not typically associated with our dominant colour preferences. Using the ICES model to prepare questions in advance, or even during the coaching session, will ensure your questions address the needs of each colour energy, making them at times stretching for the individual, and at times more comfortable.



Sample ICES questions

What does the data in the profile tell you?

What is your main obstacle and how is this causing a problem for you?

How would you describe your current situation?

What is preventing you from moving forward?

What examples do you have of this statement in action?



What are you going to do about it?

Who can support your success and how will they do it?

What excites you?

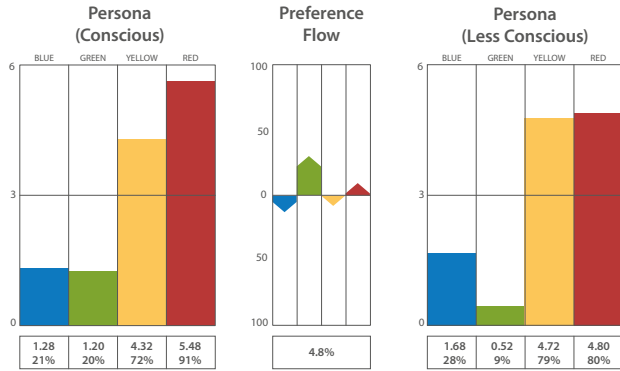
What are you most proud of?

What possibilities do you see going forward?

What resources do you need to help you move forward?

What can you do differently?

Example one



Informative:

I can see your Earth Green energy is going up in the preference flow; can you give me examples of when you use that colour energy in your role?

Supportive:

How does it feel when you dial up your Earth Green energy? How do use your Fiery Red energy to help the team achieve their objectives?

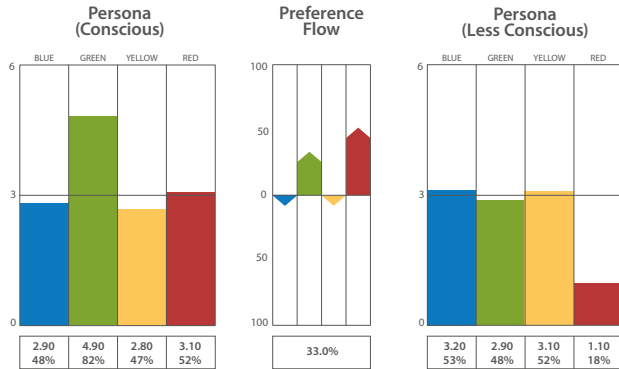
Challenging:

How does dialling up the Earth Green energy help you achieve your objectives? You have quite an extraverted preference; when has that hindered you?

Expansive:

What opportunities does your Fiery Red energy offer you? What could look different if you used more Introversion?

Example two



Informative:

Your other three colour energies are quite close together; can you give me examples of when you have used each one effectively?

Supportive:

Often we find that people with creative patterns are experiencing change or transition; are there any relevant factors in your case?

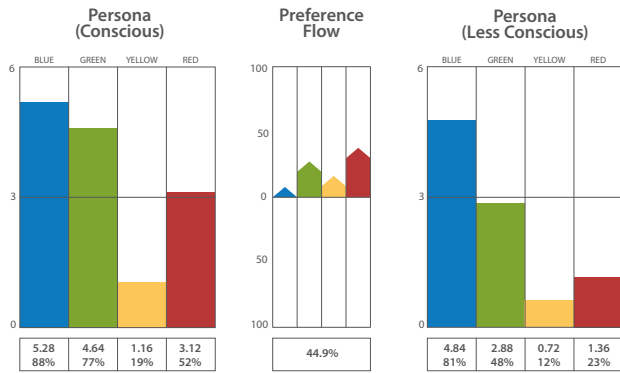
Challenging:

What situation or role demands are causing you to increase your Fiery Red energy? Do you ever get feedback that people find it hard to predict how you will show up?

Expansive:

What possibilities does having access to all four colours energies offer you?

Example three



Informative:

What are your thoughts now that you have had the opportunity to reflect on your graphs? What could contribute to someone using more Fiery Red energy?

Supportive:

I see you increasing or dialling up all four colour energies. How difficult is that to maintain? How do you sustain this effort?

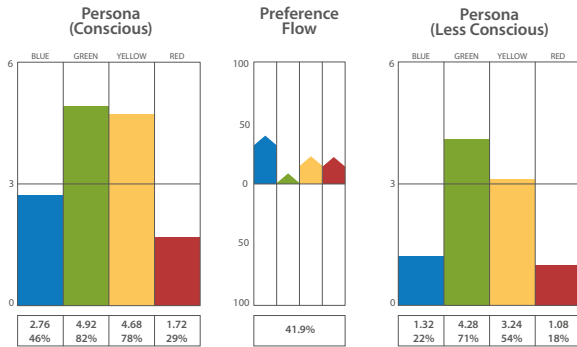
Challenging:

How hard is it to dial up Fiery Red energy given you have a preference for Introversion? What tangible outcomes would you like from today's session?

Expansive:

What opportunities does using more Fiery Red energy give you? And Sunshine Yellow energy – what would open up to you if you used more?

Example four



Informative:

What are the factors in your role that require you to dial up all four colour energies? Can you give me examples of when you use each one?

Supportive:

Do you find it difficult to use your Fiery Red energy? You have all four colour energies going up in the preference flow; do you find that difficult?

Challenging:

You have a preference for Feeling. Has making a decision in this way ever got you into trouble?

Expansive:

Can you visualise how your outcomes might be different if you used a more objective decision-making approach?

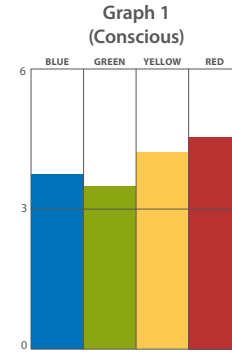
ICES worksheet

Objective observations: _____

The worksheet features a large 2x2 grid. The central logo is a circle divided into four quadrants. The top-left quadrant is blue with the letter 'I' and the word 'INFORMATIVE' written along the top arc. The top-right quadrant is red with the letter 'C' and the word 'CHALLENGING' written along the top arc. The bottom-left quadrant is green with the letter 'S' and the word 'SUPPORTIVE' written along the bottom arc. The bottom-right quadrant is yellow with the letter 'E' and the word 'EXPANSIVE' written along the bottom arc. The grid lines are colored to match the quadrants: blue on the top-left, red on the top-right, green on the bottom-left, and yellow on the bottom-right.

Overshift

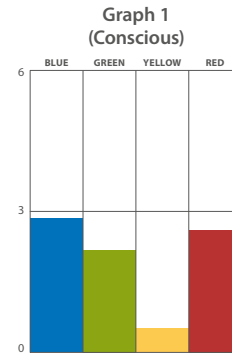
An overshift pattern is one where all four colour energies are above the mid-line. This occurs in less than one in 2,000 responses. If this happens the numbers are 'nudged' so that the lowest score of the four colour energies is reduced to 2.99. This means the wheel position will be in the 'accommodating' ring. An overshift pattern is an extension of a tight pattern and it may be an indication of someone who is putting a lot of energy into each of the four colour energies.



Example of an Overshift pattern

Undershift

An undershift pattern is also an extension of the tight pattern and is one where all four colour energies are below the mid-line. This occurs in less than one in 10,000 responses. Again, if this happens the numbers are 'nudged' so that the highest score of the four colour energies is increased to 3.01. This results in the wheel position being in the 'focused' ring. This kind of pattern may be indicative of someone being demotivated or lacking awareness of their strengths.



Example of an Undershift

Hints and tips

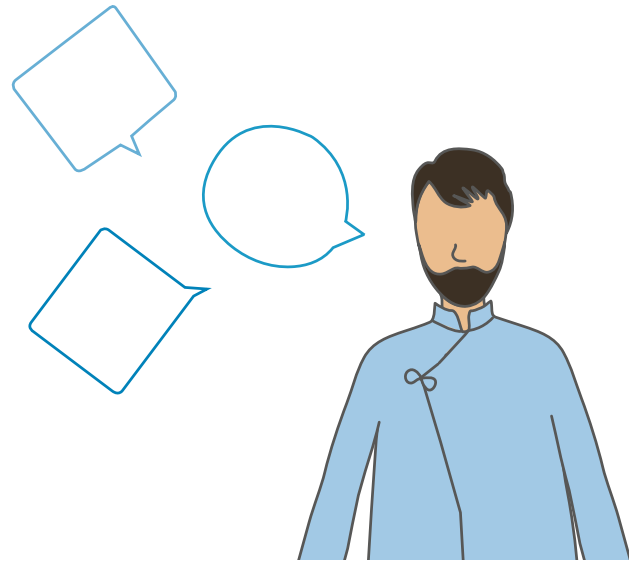
Check how they completed the evaluator. If there has been an error in the completion, suggest they re-do it immediately.

Be careful not to make any assumptions and just enquire what is going on for the individual.

Explain that a tight pattern typically reflects that they're working to meet the changing demands of their environment by using all four colour energies almost equally. They may be highly adaptable individuals who show up differently depending on the context. Discuss how their preferences may vary in different situations.

If they are going through a period of transition, suggest that they may want to complete the evaluator again in a few months' time and review the shift in their profile.

In the case of an overshift pattern, enquire about the effort required to keep all four colour energies showing up consciously and whether they can maintain this over a prolonged period of time.



During

1. Introduce Insights Discovery model (for people new to Insights Discovery)

Perception – Discuss the concept of perception, and how this fits with our self-image and self-awareness. Discuss the ladder of perception.

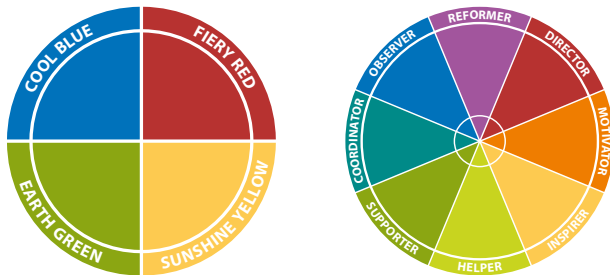
Colours – Give an outline of the colour energies. Use the ‘Beginning the Journey’ workshop journal (p12-24) for reference.

Explain the Jungian Preferences and their link to the colour energies – Give a high-level overview of the Jungian preferences and their connection with the colour energies. Use the workshop journal for reference (p25-29).

Introduce the Eight Types – Briefly share how their eight type is determined (you can refer to p32-33 of the workshop journal).

2. Personal overview

Ask the client to read through their overview and highlight statements that stand out, either as especially true or untrue. Discuss these and establish face validity. Ask selected questions from this guide.



3. Colour dynamics graphs and wheel

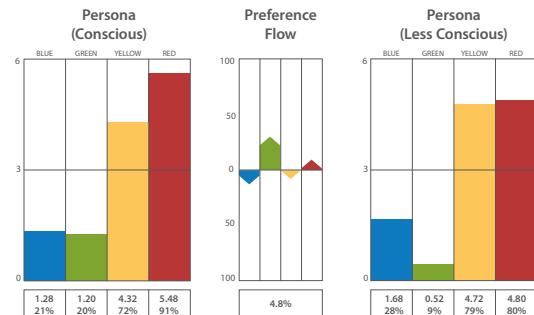
Remember this is a two part process – objective explanation and subjective exploration.



Objective explanation

Briefly explain how the graphs are generated from the evaluator scores. Encourage clients to share their initial reactions to the graphs and discuss how their preferences typically show up in their role. Encourage discussion around conscious and less conscious behaviours.

Explain the process of getting from the bar graphs to the wheel position and ask about where they would place people they know on the wheel. Discuss how similarities and differences show up in some relationships.



Subjective exploration – example

Start with the Conscious

- How do they see the colour energies in action in this pattern?
- Where have they used each of these colours in their job?
- What is the good day, bad day impact of these colours?

Move to Less Conscious

- If this is how they react, how do these colours show up when under pressure?
- Who at work might describe or see these colour energies?

Preference Flow

- Get them to reveal their story

4. Key strengths and possible weaknesses

Ask the client to read through the statements and pick the two or three that resonate most with them. Explore how these statements are evident in their role.

5. Effective communication

Ask the client to highlight the top two to three statements on each page. Discuss specific times where communication is typically effective for them and where it is not. Ask how



the statements highlighted relate to these examples and discuss how to ensure their communication needs are met going forward.

6. Suggestions for development

Select the suggestions that stand out as a priority and discuss why these are particularly important.

7. Action planning

Each conversation with the profile should conclude with the client summing up their thoughts about what they have learned and what they feel most strongly motivated to work on. It may be beneficial to use the G-WAVE model, which can be found at the back of the Beginning the Journey workshop journal (p49-51).



After

1. Check in

A few days after your coaching session, it is advisable to check in with your client to see if they have any further thoughts, insights or questions. After they have had a chance to reflect, they may have had more 'a-ha' moments or additional questions may have arisen. They may also have shared their profile with someone who knows them well and had feedback. So, it's a good idea to let them know you're on hand to respond to anything they want to share.

2. Establish next steps

The profile is intended to be a catalyst for action so check in again after a few weeks to see what actions they have taken since the first session and what they intend to focus on next.

3. Plan for future sessions

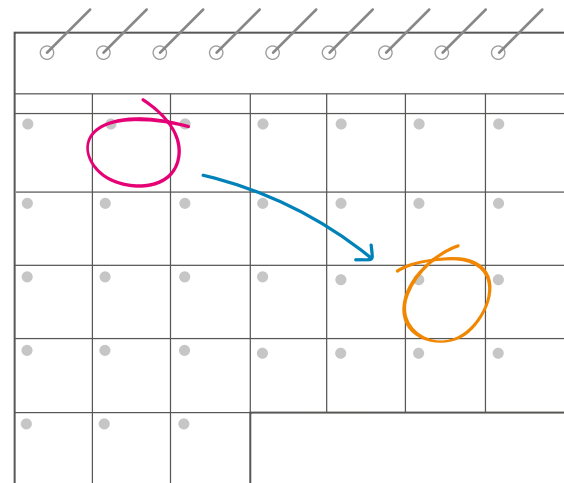
It may also be beneficial to take the initiative and suggest further discussion where you can explore other components of the profile in more detail.

Possible follow-on conversations may focus on:

- Overcoming blockers to personal effectiveness (using Key Strengths, Possible Weaknesses and Possible Blind Spots pages)
- Overcoming interpersonal conflict (using Effective Communication and Your Opposite Type pages)

- Creating a personal development plan (using Personal Achievement chapter)
- Enhancing motivation (using Management chapter)
- Improving performance in the team (using Value to the Team, Effective Communication pages and Management chapter)

Select the profile content most relevant to the underlying issue presented. The colour dynamics graphs are a useful reference for all conversations.





02 Basics about the profile

The Insights Discovery Personal Profile is a core feature in any Insights Discovery learning solution. The profile is instrumental in helping recipients gain a detailed understanding of their personal style and how this impacts their relationships in both personal and professional environments. Generated from the completion of the evaluator, every profile is unique, and helps to recognise and value the differences in every individual.

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Uniqueness of the profile	21
Key points to remember	22
Practitioner tips on using the profile	23

The basics

Generating the profile

Many people wonder how the magic happens. They fill out the evaluator then, by some hidden wizardry, the profile appears. They think “Wow – how do they know this about me? Who’s been spying on me?!”

Without fully revealing the secret behind the magic, we can give you some idea of how this happens. There are two basic ingredients that interact with each other: 1) the evaluator scores and 2) the profile statement database.

The evaluator consists of multiple frames. In each frame, individuals are asked to rate four statements – each of which links to a different preference. In each frame, they choose a ‘Most like me’ (given a value of 6) and a ‘Least like me’ (given a value of 0). They rate the other word pairs between 1 and 5.

Once the recipient has completed the evaluator, the scores for each energy are averaged. These average scores represent the individual’s unique colour preferences. A wheel position is allocated using the order of their colour preferences and how many are above 3 (the graph mid-line).

The profile database, which contains all the profile text, has around 10,000 statements in it. Each statement is linked to particular colour preferences. The statements that are selected will depend on the individual’s response to the evaluator. There is a pool of possible statements available in every section of the profile so there is a degree of randomness in the exact selection.

0. Sensitive and diplomatic L 1 2 3 4 5 6	3. Calm and even-tempered L 1 2 3 4 5 M
Encouraging and valuing L 1 2 3 4 5 M	Determined and dominant L 1 2 3 4 5 M
Precise and deliberate L 1 2 3 4 5 M	Buoyant and lighthearted L 1 2 3 4 5 M
Results-oriented and fast L 1 2 3 4 5 M	Exact and precise L 1 2 3 4 5 M
1. Composed and observing L 1 2 3 4 5 M	4. Confident and vigorous L 1 2 3 4 5 M
Diplomatic and calming L 1 2 3 4 5 M	Orderly and concise L 1 2 3 4 5 M
Open and outgoing L 1 2 3 4 5 M	Familiar and stable L 1 2 3 4 5 M
Active and controlling L 1 2 3 4 5 M	Talkative and genial L 1 2 3 4 5 6 M
2. Amicable and quick L 1 2 3 4 5 6 M	5. Logical and clear L 1 2 3 4 5 M
Reliable and restrained L 1 2 3 4 5 M	Direct and challenging L 1 2 3 4 5 M
Forceful and goal-oriented L 1 2 3 4 5 M	Loyal and accommodating L 1 2 3 4 5 M
Methodical and logical L 1 2 3 4 5 M	Sociable and active L 1 2 3 4 5 M

Example evaluator

Key points to remember

Each person's profile is confidential. In a workshop situation, it is unethical to read out the contents of someone's profile or show their graphs without their permission. Each person decides what they are willing to disclose (most people are comfortable sharing, particularly by the time you get to the part of the day when you have handed out the Profile!).

Remember this profile is about behavioural preference – it does not describe capability, motivation or experience. Neither type theory nor trait theory claims to explain all of human behaviour. The human psyche is a complex phenomenon.

Individuals know themselves better than anyone. Do not try to convince someone that something in the profile is true if they do not see it. It may be a blind spot, and it is the individual's journey of self-awareness that determines if, when and how they acknowledge their blind spots.

Based on what is in the profile, people should not be persuaded that they would be good or bad at a specific job. No matter what our preferences are, we can be effective in any role.

You need to be accredited to coach someone with their Insights Discovery Profile and coaching is a profession that needs specific training. Using Insights Discovery to support a coaching process should only be done by a certified coach.

Recommendations

It is a good idea to advise people to re-do the evaluator every year or two and get a new profile. It can be beneficial to see how an individual's preferences change over time, either as a result of personal development or a change in circumstances.

It can be helpful to work with the profile face-to-face so that you can read body language and connect more effectively. We recognise this isn't always possible so if you are connecting virtually we strongly recommend using a webcam or video feed.

Practitioner tips on using the profile

Do	Don't
<p>Emphasise strengths – The majority of the profile content is positive and is intended for people to appreciate their unique value.</p> <p>Emphasise uniqueness – No two profiles are the same.</p> <p>Keep any explanations simple – Focus the discussion on what is personally meaningful to the individual – not the theory.</p> <p>Encourage recipients to share their profile – with friends, family and colleagues.</p> <p>Encourage sharing of profile statements within the workshop – Make sure that you highlight statements from different parts of the Insights Discovery wheel to help participants appreciate different styles.</p> <p>Encourage recipients to use the profile in different situations – beyond the initial workshop.</p> <p>Ask questions more than providing answers</p>	<p>Share the contents of a profile – unless you have the individual's permission.</p> <p>Get hung up on justifying what is in someone's profile – It is their profile. If they object to any statements, give them permission to score out any statements they do not agree with.</p> <p>Interpret what the statements in someone else's profile might mean – You can objectively share what you see in the profile – it is their subjective interpretation that will create the personal meaning.</p>

03 Working with the profile

Section overview

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Overview

Provides an overview of an individual's unique personal style and helps individuals recognise how they are seen by others in the workplace.

What's in this section?

The overview consists of three parts:

- Personal style
- Interacting with others
- Decision making

The majority of the statements in the overview are positive in nature although there are a couple of paragraphs that specifically describe some of the more challenging aspects of the recipient's personal style.



Hints and tips

Check face validity – Good face validity will ensure engagement with the profile and confidence in Insights Discovery. Highlight any statements that you think are wholly inaccurate, count them up and assign 2% to each one. Take this number away from 100 to get a guide for face validity. For example, four inaccurate statements would give 92% face validity. This arithmetic is reasonably accurate as there are about 50 statements in the overview.

Explore blind spots – Address statements that you don't see in yourself (what you highlighted as inaccurate in face validity exercise) and consider who might see this aspect in you. Share these with people who know you well and ask for feedback.

Explore adverse reactions – Most people are satisfied to read something that describes them positively and some may have a strong, even negative, reaction to a perceived weakness. If there is a statement that causes this kind of reaction, approach this with interest and curiosity, exploring the reaction rather than working to prove it as inaccurate or defend a point of view.

Most accurate – Highlight one or two statements that are the most accurate for you. Consider what recent evidence you have of this.

Exploring context – Consider if there are any statements that are true some of the time but not always and explore why this is the case.

Relationship considerations – Focusing on 'Interacting with others', explore which aspects of your personal style work well in some relationships but not others.

Decision making – Determine which statement most accurately reflects your decision-making style. Consider the positives of this, and the possible limitations of this approach. Finally, consider one thing you could do to improve your decision-making style.

Engaging discussion (questions for coaching and facilitating)

- Which statement stands out as most accurate? Which is least accurate? Why?
- What is the most surprising phrase in your overview?
- What, if anything, do you not agree with? Might someone else see that in you?
- Is there a statement you are having a strong internal reaction to? What does it raise for you? If you were to focus on your reaction, rather than on the statement, what could you learn about yourself?
- Which statements are true in some circumstances but not all? Why?
- Which statements are more prevalent in your work environment?
- Where do you see examples of particular statements in action?
- Think of a challenging relationship issue you have had recently – which statements in the Interacting with others section help to highlight why this may be an issue for you?
- Think of a recent decision you made. Which statements in the Decision making section describe how you applied your personal style in making that decision?
- What, in your opinion, have you learned about yourself from this overview?

Key strengths and possible weaknesses

Helps delegates appreciate their key strengths and acknowledge the value they bring to their role. Helps them consider their possible weaknesses and gain insight into how these can show up in the workplace.

What's in this section?

There are ten bullet points on each page, typically short and to the point. The statements are not listed in any specific order so the tenth bullet on the list is just as relevant as the first.



Hints and tips

Key words – It may be that you don't see the whole statement as accurate but certain words resonate with you. Highlight these.

Feedback from the team – Working with the Key strengths page, put your name on the top of the page and pass profiles around the team. Ask each team member to initial the strength statement that they most see in you (try this back in the workplace).

Underused strengths – Consider if there is ever a time when any of the strengths are not effective or if they are seen by others as not useful.

Overused strengths – Discuss times when you might overuse your strengths or rely too heavily on them.

Discuss weaknesses in pairs – In a group workshop many people can feel uncomfortable talking openly about their weaknesses, so sharing one-on-one may be advisable.

Personal assessment – Give yourself a score from 1-10 for each statement, rating the extent to which you agree with each point.

What's missing? – Write your own statements for both strengths and possible weaknesses, using the statements in the profile as inspiration.

Engaging discussion (questions for coaching and facilitating)

- How could you bring even more of these strengths into your role?
- Which statements are most evident in your role right now and which are not?
- What do you need from others to support you in maximising your key strengths?
- When/where/with whom are you able to bring out your strengths most?
- Which strength/possible weakness do you think others in your team would say they see most?
- Other than what is written in the profile, what other strengths and possible weaknesses do you see in yourself?
- Which possible weaknesses were true at one time but you have now overcome?
- Which possible weaknesses trip you up most often?
- Which possible weaknesses are evident in some circumstances but not others? Why?
- Who could support you in overcoming some of your possible weaknesses?

Value to the team

Helps the recipient to explore how they can (and do) add value in the team environment.

What's in this section?

There are ten statements on the page. Each statement describes the value the recipient may bring to the team environment.



Hints and tips

(These can all be done with a team back in the workplace.)

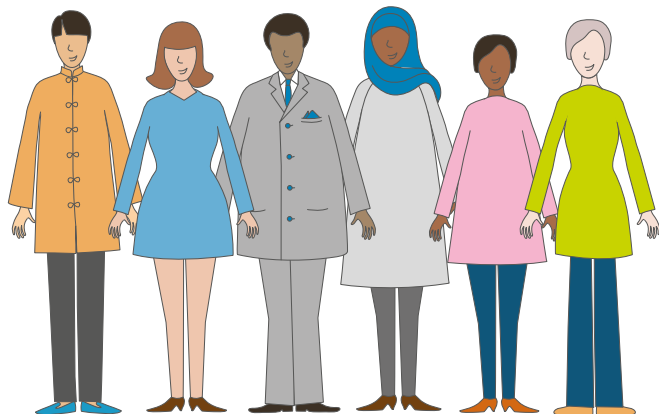
Explore the 'how' – Select statements that feel most important and share examples of when they are evident in the team.

Get feedback – Ask the team what they value most about each other.

More of/less of – Put your name at the top of the page and circulate it around the team. Ask each team member to put an M or an L next to the statements they would like to see you using more of/less of in the team.

Self-assessment – Rate the extent to which you are bringing each value statement to the team (scoring each one from 1-10). Discuss your self-perception with your team mates.

Identify who brings what – Put one or two statements from each profile on postcards or post-it notes, mix them up and ask the group to identify who in the team each statement relates to. This can be done as a quiz; profiles should be closed to ensure they do not give the answer away.



Engaging discussion (questions for coaching and facilitating)

- What specifically could you do to bring even more value to the team?
- Which statement do you think is most valued by others?
- Is there any statement that you do not think is being valued by others in the team?
- Which statement is something that the team would like to see more of from you?
- Other than the statements on this page, what other value do you bring to the team?

Communication

Helps individuals identify what enhances and what blocks effective communication with them.

What's in this section?

The Effective communications page lists 12 statements giving suggestions as to how to be effective when communicating with the recipient. The Barriers to effective communication page lists a further 12 statements suggesting what it is important NOT to do to ensure effective communication with the recipient.



Hints and tips

In this section, encourage recipients to share with each other in the room, with other colleagues back in the workplace or even with family. You may also want to encourage a feedback exchange, where individuals ask for their communication needs to be met.

What matters most – Identify the statements that are most critical to effective communication and make sure these are shared with colleagues.

Consider individual relevance – Identify which statements are most relevant in communicating with individual colleagues. These should be shared with the relevant people back in the workplace.

What's working well – Think about someone you work well with and highlight the effective communication statements that are typically present in that communication.

What's missing – Think about someone you are finding difficulty communicating with and highlight which effective communication statements are missing from the interactions.

Identifying barriers – From the Barriers to effective communication statements, highlight which ones are currently causing an issue and to what extent.

Overcoming barriers – Consider, from those statements that are causing an issue, with whom or where the issue is arising and how they can be overcome.

Possible blind spots

Helps the recipient become more aware of things about themselves that they may not readily see or appreciate.

What's in this section?

The style of this page is similar to the overview section in providing paragraph descriptions. It is the only page in the profile that is generated from the Less Conscious graph. For those in the classic, rational types, where the Less Conscious and Conscious wheel positions are the same, the paragraphs will be quite similar to what is found in the overview section. However, for other types, the paragraphs will be derived from a different wheel position and will describe different aspects of their persona. As a result, some individuals may not recognise these to the same extent, hence the name 'Blind spots'. As it says in the introductory text at the top of the page, it can be particularly useful to share this page with others who may see things that the individual may not see themselves. The page also uses the words 'possible' blind spots, acknowledging that the recipient may already be aware of these traits.

Hints and tips

Highlight key issues – Underline any statements that stand out as particularly relevant.

Explore specific examples – Share examples of how your blind spots have shown up in your work or home environment.

Consider other responses – In a particular context, consider where you have responded in an ineffective way and come up with alternative responses (key strengths statements may give some ideas).

Identify triggers – Reflect on what the typical triggers are that lead to a response from your blind spots.

Share with a colleague – Give the page to a close colleague; ask them to read it and give feedback on how they have seen the blind spots showing up and which they think most need to be developed.



Opposite type

Describes the typical traits of an individual whose wheel position is directly opposite that of the recipient. It also provides insight into how their opposite type may be viewed negatively by the recipient and suggests strategies to improve communication with their opposite type.

What's in this section?

There are two pages in this section. The first page gives a description of the recipient's opposite type, in particular describing how they may be viewed in an unfavourable way by the recipient. The second page offers 12 suggestions for communicating more effectively with the opposite type – six tips to DO and six tips to NOT DO. On this page, the opposite type is referred to as him or her – the gender matches that of the recipient.



Hints and tips

Identify opposite types – Identify who you interact with that you see in the opposite type category. Note: they are not limited to the person's Insights type only as you may see opposite type behaviours in a range of individuals.

Recognise projections – Acknowledge where your view of your opposite type may be unfavourable; try to acknowledge the upside of any behaviour or trait you see as negative.

Recognise their value – Using the opposite type page as a catalyst, write as many positive statements as you can to describe what you value about an opposite type that you know.

Learn from the past – Think about times when communication with your opposite type has not been effective. Using the Communication page, identify what you did or didn't do that may have contributed to this.

Plan an approach – For an upcoming conversation with your opposite type, select the communication statements that you think are most important and plan the interaction with these in mind.

Suggestions for development

Provides thought-provoking ideas for the individual to consider both their focus for personal development and how to enhance their behavioural flexibility.

What's in this section?

This is the last text page in the Foundation chapter. There are ten statements that offer suggestions for development. They are designed to stretch the recipient out of their comfort zone and expand into areas that are typically outside the parameters of their personal style. The more an individual can be comfortable doing things that are not typical for them, the more flexible their approach will be and they will be better able to adapt and connect to different people and different environments.

Hints and tips

Identify priorities – Highlight the top 3-5 statements that stand out as things you need to develop.

Identify the impact – Working with one suggestion at a time, list what benefits could be gained from following through and what the possible consequences could be if you didn't follow through.

Make it specific – Re-word a statement so that it conveys something specific and tangible that you can work on; then make a commitment to action.

Build on previous successes – Pick out any statements that you have already developed; identify what you did and what impact it had.

Get feedback – Ask a friend, colleague or manager which suggestion they think you would benefit most from developing and why.



Management chapter

Helps individuals consider the best working environment to maximise their effectiveness and helps their managers understand how best to manage and motivate them. Also develops an individual's awareness of their own management style and how to improve it.

What's in this chapter?

There are four pages in this chapter, each of which has ten statements. The four pages cover the following topics:

- Ideal environment
- Managing you
- Motivating you
- Management style



Ideal environment

Hints and tips

In place/not in place – Put a tick next to those statements that are already in place in your current working environment and a cross beside those that are not in place.

Assess the impact – Discuss with a partner what the impact is of not having key aspects of your ideal environment in place.

Most important – Prioritise the statements, identifying your top 3-5 issues that have the most impact on your ability to work effectively.

What I can control – Having identified what you need in your ideal environment, assess what you can do to create and maintain it.

Requests of others – Consider what help or support you need from others to make the environment as effective as it can be for you and make the necessary requests.

The Discovering Leadership Effectiveness workshop journal is a useful resource to go alongside this chapter.



Management style

Hints and tips

Use in any position – Use this page even if you are not in a management role; it can bring awareness to interpersonal behaviours that may emerge in a team situation or a peer relationship.

More of/less of – Ask your team what they would like to see you doing more of and what they'd like to see you doing less of.

Your style in action – Identify which statements you think are most evident in your management style.

Areas for development – Identify which aspects of your management style trip you up most often and are most in need of development.

Engaging discussion (questions for coaching and facilitating)

Which aspects of your management style are effective and appreciated by certain individuals and not by others? Why is this and what do you need to do differently?

Back in the workplace

Suggest that managers share the page with people who they manage and ask which aspects of their management style they appreciate and which they find more challenging. This will vary from person to person, depending on their preferences, so it gives the manager direct feedback on 'adapting and connecting' requirements. Also ask these individuals to put their initials next to the statements that they see most in their manager. They can then engage in a series of one-to-one discussions to identify tangible examples and clarify points for action with each individual.

Effective selling chapter

Helps individuals understand how their unique colour mix impacts how they sell or influence others and how they can better adapt their style.

What's in this chapter?

There are eight pages in this chapter as follows:

- Selling style – one page
- Six steps of selling – six pages
- Sales Preference Indicators – one page



General hints and tips (apply to all eight pages)

This chapter isn't just relevant to selling – Many of the statements can be applied to relationship building and influencing.

Make the best use of strengths – Highlight any statements that refer to strengths they are not using and identify ways you can draw on these strengths.

Build a strategy – With reference to the recommendations and the colour energy preference of a customer, create a strategy for your interaction with them.

Create a cue card – Note down key points from your strategy for each customer interaction and have it with you during your meeting.

Engaging discussion (questions for coaching and facilitating)

- How have your colour preferences and your particular style been evident in your approach?
- What specific example do you have to illustrate your unique approach in action?
- Where has your approach been particularly effective and where has it not been effective?
- How and where could you make better use of your strengths?

Selling style

This page describes how the recipient's preferences show up in a sales environment. It describes both strengths and possible weaknesses of the individual's style. Working with this chapter in a group also gives recipients an opportunity to understand and appreciate others' selling styles.

Hints and tips

Pair share – Highlight the statements that stand out as being particularly true and working with a partner, share how your colour preferences and your particular style have been evident in your approach to selling/ influencing. Look for specific examples to illustrate your unique approach in action.

On the mat – Select the one statement that is most relevant to you. Stand on a floor mat in your wheel position and read out the chosen statement in turn. All the delegates will gain a better understanding of the strengths of the different positions around the wheel.

Blind spots – Take note of any statements that you think DO NOT apply to you. Share examples to illustrate how this statement is not true for you and/or get feedback from people you know to check your perception as the statement in question may be a blind spot.

Suitability – Consider where your selling style has not been effective with some customers and work in pairs or small groups to identify what you need to change in your approach.

Engaging discussion (questions for coaching and facilitating)

- How have you used your strengths in the last month?
- How have your challenges shown up in a recent project?
- Have any of your strengths in selling/influencing ever not been effective for you?
- How could you amend your style to become more effective?
- With whom has your selling/influencing style not been effective? Why not?
- Who else's style in the team might be more effective with this customer?
- Who in the team may be able to fill a gap that you find difficult to fill, based on your preferences?

Six steps of selling

There is one page for each step and each page has 12 statements; six statements describe typical strengths of the recipient and six statements make suggestions for how to be even more effective in each aspect of selling. The six steps are shown in the six steps model graphic:



The size of the respective sections of the graphic give an indication of the relative importance of each step.

The six step pages follow a similar format. In one workshop it may not be necessary to go through all six sections in sequence. The delegates may choose one or two sections to focus on. Typically they will choose those sections that have most relevance to them.

Six step pages

Hints and tips

Strengths in action – Share examples of when you’ve seen any of the statements showing up either in a sales or influencing interaction and explore how your colour preferences impacted on the situation.

Underusing your strengths – Consider where you are not utilising some of your strengths. Discuss with a partner where you could make better use of these.

Put one customer in the spotlight – Highlight the statements that could help you in working towards identifying one customer’s needs. Discuss with a partner and agree what next steps you will take. Select the most relevant recommendations for this same customer.

Best fit – Consider which colleagues or customers your natural style works well with and where it is a mismatch.

Prepare questions – Develop a set of questions that you will ask your customer depending on where you are in the sales process.

Sales team norms – Consider the typical practices utilised in the team. Define and discuss what best practices, if any, are being followed in preparation for prospective sales.

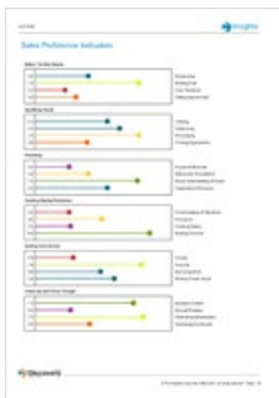
Beyond selling – Consider these statements in the context of any relationship issue.

Engaging discussion (questions for coaching and facilitating)

- How could these statements be relevant beyond a sales relationship?
- Where are you typically using your strengths most?
- Which strength do you particularly need to use more of? Why?
- When have your strengths become over-extended and not been beneficial?
- Which recommendation would make the most difference with a current customer? What do you need to do differently and what support, if any, do you need to ensure you follow through?
- With whom might your typical style work best and with whom might it be effective?
- What approach could you take next time you are faced with a challenging interaction, bearing in mind your colour preferences and those of the customer?
- In a challenging interaction, what good day and bad day colour energy behaviours did you perceive in the customer and in yourself?

Sales Preference Indicators (SPIs)

This page shows each of the six steps of selling sub-divided into a further four aspects. Each SPI graphic is coloured to match one of the eight Insights types. The colour represents which of the eight types is likely to be most suited to that aspect of selling, e.g. researching is a strength most closely related to the observer whereas building trust is a typical strength of the helper. The numerical ratings indicate how likely the recipient is to be effective in that aspect of selling, based on their colour energy preferences.



The calculation of SPI scores

The scores for the Sales Preference Indicators (SPIs) graphic are calculated as follows:

Each of the 24 elements of the graphic is allocated an Insights Discovery graph shape, with scores for Cool Blue, Earth Green, Sunshine Yellow and Fiery Red energies. This graph shape identifies a profile which can lend itself to a strong preference for that particular element.

The individual score for each element is calculated by comparing the person's averaged conscious and less conscious persona scores, giving an element score out of a maximum of 10. In other words, the closer an individual's profile is to the ideal, the higher the score for that element. The actual score is calculated using a mathematical distance formula which identifies how close the individual's graph is to the ideal. The lower the score for an element, the further the individual's profile is from the profile that is deemed to be ideal for that element. In this case, it's less likely that the individual will have a preference for that element.

There are 24 different ideal graphs, one for each element in the SPI graphic. The graphs are broadly distributed around the Insights wheel: three in each of the primary eight types. Since this is a measure of preference, it is not possible to score highly in all 24 elements at once. Preference in selling areas and psychological preference are closely correlated. Because of the distribution of ideal types for each element around the Insights wheel, an increased preference in one area will mean a reduced preference in another.

The SPIs are designed to be used as a guide for development and are not a direct measure of skill or competency.

Engaging discussion (questions for coaching and facilitating)

- How are you making the best use of your strengths?
- Reflecting on your lowest three SPI scores, when have these been a challenge for you?
- Which SPI needs your focus most? Why? How could you enhance your performance in this?

Use the Discovering Sales Effectiveness workshop journal with this chapter.



Personal achievement chapter

Stimulates thinking around goal setting and time management and also helps recipients maximise their creativity and deepen knowledge of their own learning style.

What's in this chapter?

This chapter consists of six pages. After the introductory page, there are a further five pages on:

- Living on purpose
- Time and life management
- Personal creativity
- Lifelong learning
- Learning styles



Living on purpose

This page has three paragraphs of text describing the recipient's personal style and typical approach to goal setting.

Hints and tips

Purposeful goals – Write down up to three goals that you are working towards at the moment. Note any connections between statements on the page in the profile and these goals. How are they linked?

Engaging discussion (questions for coaching and facilitating)

- What matters most to you when setting goals?
- What examples do you have of success in your approach to goal setting?
- Where has your goal-setting approach not been effective? What got in the way?

Time and life management

Contains six statements on how the recipient typically manages their time and a further six statements giving suggested actions.

Hints and tips

A day in the life – Pick a typical day and consider how the managing time statements show up. Consider what would look different if you took on one of the suggestions for development.

Motivation – Using this page as a catalyst, work with a coach to explore when you do things enthusiastically and effectively and when you procrastinate and/or work slowly.

Engaging discussion (questions for coaching and facilitating)

- What do you see as your greatest strength in maximising your time?
- When have you experienced getting a lot done in a short space of time? What were you doing and why was this important to you?
- What has to be in place for you to be both productive and purposeful?
- What do you typically waste the most time on?
- What could you put in place to ensure you do not get side-tracked by distractions?

Personal creativity

Contains six statements on the recipient's approach to creativity and a further six statements giving suggested actions.

Hints and tips

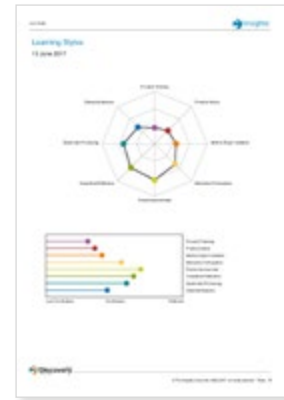
Exploring creativity – Consider times when you have been creative and reflect on what has contributed to the creative flow. Create a list of people and/or things that stimulate your creativity.

Engaging discussion (questions for coaching and facilitating)

- When did you last do something creative and how did you go about it?
- What typically stimulates your creativity (other people/music/art/a problem to solve ...)?
- How could you tap into your natural creativity more effectively? Where could it be most beneficial?

Lifelong learning and learning style

The Lifelong learning page has six statements describing what enables the recipient's learning and a further six statements with suggestions for how to stretch their learning. The Learning style page lists eight learning styles mapped to each of the eight Insights types. The radar graphic shows the recipient's typical distribution of preference for each style, depending on their colour energy scores and the graph below shows the same data in a bar-graph format.



Hints and tips

Link lifelong learning with ideal environment – Look at how the ideal environment statements can also support you in providing the most conducive learning environment.

Identifying learning styles – Think of specific learning activities that you have enjoyed and assess which style these activities linked to.

Enhancing learning – Think about specific times when you were learning effectively and identify what benefitted you in your approach.

Expanding learning style – Look for opportunities to try out learning using an approach outside your typical preference.

Engaging discussion (questions for coaching and facilitating)

- What helps you to be effective in your learning?
- When have you struggled to learn? What was getting in the way?
- Where could you apply your preferred learning style?
- Where could you stretch your learning by adopting a different approach?

Interview chapter

Provides the individual with some thought-provoking questions that look into areas of potential weakness.

Note: This page is not intended to be part of a selection process, as the Insights Discovery Profile is not a recruitment tool. Whilst research has shown that some personality types may be suited to particular roles, this doesn't mean that other personality types may not also be suited to those roles.

What's in this chapter?

There are ten questions on this page that ask the recipient to respond to some issues they may be less comfortable with.

Hints and tips

Adapt to suit the context – Use the questions as a catalyst but adapt them to be a better fit for the purposes of the interview.

Use for coaching – Select some questions that you would like to explore in a coaching interaction.

Respond with specifics – Make references to actual events that illustrate your approach in action.

Engaging discussion (questions for coaching and facilitating)

- Which question did you find most difficult to answer? Why?
- What other questions would you ask yourself if you were to design your own interview?



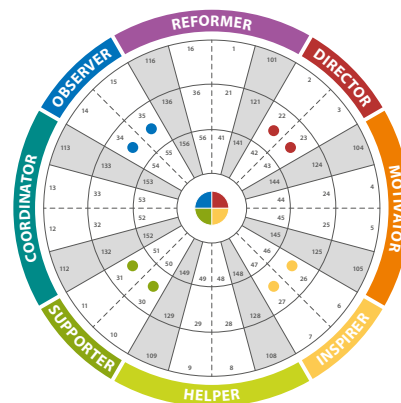
The 72-type wheel

This page shows the individual's position on the Insights Discovery 72-type wheel.

What's on this page?

This page shows the recipient's conscious and less conscious wheel positions. Remember, only two factors determine an individual's wheel position: the order of the colour energies and the number of colours above the mid-line. In rational classic types (Director, Inspirer, Supporter, Observer), in the positions highlighted in the wheel below, it will appear that there is only one wheel position plotted. This is because the conscious and less conscious wheel positions are the same and the two pie charts are on top of each other.

For a technical explanation of the wheel, see the Insights Discovery Theory Practitioner Guide.



Hints and tips

Share wheel position with colleagues – In a team setting, look at the differences in wheel positions. Have each team member stand on their position on a mat, or plot it on a slide if working online, and discuss how these differences show up in the team dynamics.

Plot your own team wheel – When you know the wheel positions of your team, plot and label them on your own profile so you can see the team dynamics. If you don't know the wheel positions, think about the people you want to plot on the wheel – what do you think are their highest and lowest colour energies? This will give you an idea of their Insights eight type, and allow you to consider adapting and connecting strategies.

Conscious and less conscious positions – Discuss the implications of any differences in conscious and less conscious positions.

Compare wheel positions in successive profiles – If you have completed more than one profile, compare where you are now with wheel positions in the past. If you have changed position, discuss what may have contributed to this.

Colour dynamics graphs

Provides a graphical image of the recipient's responses to the evaluator.

What's on this page?

This page has four graphs:

Persona (Conscious) – This bar graph is a direct representation of how the recipient scored the evaluator and indicates their chosen preferences for each of the colour energies.

Persona (Less Conscious) – This bar graph is calculated from the construction of the conscious graph, based on Jung's theory of polar opposites.

Preference Flow – This graph shows the energy change from the less conscious to the conscious persona. It indicates the extent to which the recipient is consciously boosting or restraining each of the colour energies.

Footprint – This circular graph plots the scores for the four colour energies around the wheel and shows a unique footprint for both the conscious and less conscious personas.

Hints and tips

Make it personal – When discussing the graphs, keep any explanation of the theory to a minimum. Instead talk about what the graphs mean to the delegates.

Encourage personal examples – Share examples of your colour dynamics showing up in the work environment.

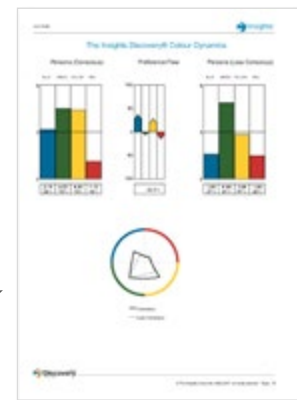
Discuss combinations of colour energies – Encourage discussion about how different combinations of colour energies work together, e.g. Fiery Red energy coupled with Cool Blue can show up quite differently than when coupled with Sunshine Yellow.

Cover ALL colour energies – Encourage discussion about the use of all the colour energies rather than being focused only on those that are particularly high or low.

Use the blocks – Put the foam colour blocks in the order of colour energies that match your wheel position, splitting the blocks at 90° where the mid-line is. Make these visible to others and share feedback with each other on how you see these colour dynamics showing up.

Explore the differences – Explore situations when your behaviour comes from the less conscious graph, more than the conscious.

For a technical explanation of the graphs, see the Insights Discovery Theory Practitioner Guide.





04 Further resources

In addition to the ideas included in this guide, you can find further exercise descriptions using the profile in the following Insights Discovery practitioner resources.

Section overview

Workshop journal facilitator notes	61
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Social media	61

Workshop journal facilitator notes:

Insights Discovery an introduction (beginning the journey) – Refers to overview, strengths and weaknesses, communication, graphs and wheel.

Discovering team effectiveness – Refers to value to the team, team wheel, effective communication, ideal environment.

Discovering leadership effectiveness – Refers to decision making, management chapter.

Discovering sales effectiveness – Refers to effective selling chapter.

Practitioner guides:

Insights Discovery theory

Preparing to deliver Insights Discovery

Working with the Insights Discovery Personal Profile

Applying Insights Discovery

Social media

www.facebook.com/InsightsConnections

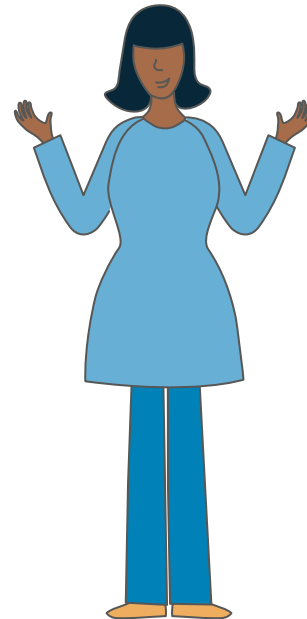
www.twitter.com/Insights

www.instagram.com/insights/

www.linkedin.com/company/insights

Remember that there is great richness in the Insights Discovery Personal Profile. You will be able to come back to it time and again to continue the learning for your clients.

If you're wondering about new ideas or an exercise for a specific application, get in touch with your Insights contact or join the online conversation on social media to connect to your community of global practitioners.





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