INSIGHT Inventory
SELF
self personality profile and interpretive booklet

Condensed Facilitator Guide
Using this Condensed Facilitator Guide.

This Condensed Facilitator Guide describes how to present a training program using the INSIGHT Inventory SELF. It matches the content up with the various support materials, slides, and activities.

Use this Condensed Guide to:

• Plan your session and its objectives.

• Identify those areas of the Expanded Training Manual you want to review in more depth.

• Select and match slides and discussion activities to support the points you wish to emphasize.

Get familiar with the training resources.

To conduct the best training session possible make use of the many training resources, examples, training aids, and interactive activities contained in the Facilitator Resource Center (Success Center).

In addition to this Guide, the Facilitator Resource Center provides:

• Expanded Training Manual with over 150 pages of detailed training suggestions, support information, teaching examples, role play exercises, etc. In short, everything you need to know to present a powerful session.

• Skill-Building Activities that contains reproducible skill-building exercises which help participants apply the material to real life situations. It also has facilitator instructions for processing each exercise.

• Technical Manual with the history of the development of the INSIGHT Inventory, theoretical basis, research data, and validity studies.

• Slides in Microsoft PowerPoint® and PDF form that can be used to guide the entire presentation.

• Extra training aids, tools and resources for facilitators, i.e. name tags, wall charts, small group activities, etc.
Open the session.

Welcome participants to the *INSIGHT Inventory* Program.

- Introduce yourself and your role as the trainer or facilitator.
- Consider starting the program with real life examples, i.e. a story about a working relationship that ended in conflict due to personality differences or a thought provoking question about how personality traits impact communication, etc.
- Ask participants to introduce themselves by sharing personal stories about personality traits that either drew people together or lead to conflict and tensions.

Describe what the *INSIGHT Inventory* program is and isn’t.

- Make the point that the *INSIGHT Inventory* assesses strengths and behavioral preferences, not weaknesses or problems.
- Emphasize that this program is about improving self-understanding and interpersonal communication, not about predicting all behavior or labeling people.
- Point out that they will learn about their individual preferences and when to flex their styles to improve relationships and communication with others.

Review the objectives of the program.

- Go over the objectives to give participants a clear direction of where the program is headed.
- If you are coordinating this program with other training materials such as team development or communication skills, identify how this component links to the entire course.
- Emphasize that the primary purpose of the program is to expand one’s skill at creating positive, trusting relationships with a variety of people with various personality styles.
Describe the program.

Review the components of the program.

Discuss the sequence of sections involved in this program:

1) Completing the INSIGHT Inventory
2) Learning about one’s own and other’s personality traits
3) Understanding the different reactions to stress
4) Identifying strategies for flexing one’s style
   These include:
   • flexing to communicate with people having opposite traits.
   • flexing to communicate with people having similar traits.

Identify how the INSIGHT Inventory helps people understand themselves and others.

- Ask for a show of hands of how many people have taken a personal style or personality assessment in the past and then, after getting their results, said to themselves, “But I’m not that way all the time.” Explain that the INSIGHT Inventory prevents this by providing two profiles, based on behavior in different settings.

- Point out that the INSIGHT Inventory recognizes that behavior may change from one setting to another. As such, it doesn’t “type cast” people as always behaving a certain way.

- Emphasize that the INSIGHT Inventory focuses on positive descriptions and strengths, rather than negatives or weaknesses. Support material emphasizes “flexing” instead of trying to change underlying personality preferences.

- Note that the INSIGHT Inventory is research-based, statistically normed, and validated. It is not a simple survey or self-comparison instrument.
Using the self-scoreable printed version.

- If participants don’t have internet access or it’s desirable that everyone complete the INSIGHT Inventory at the same time, then the paper self-scorable version and attached booklet is the best option.

- The self-scorable version makes it possible to keep all participants moving through the program together and eliminates the need for any pre-work that has to be tracked and brought to the seminar.

- There are basically two parts to the printed INSIGHT Inventory booklet. Each booklet contains a carbonless self-scorable assessment. The second part of the booklet is an interpretative guide and can be used as a stand alone workshop or combined with other materials.

- A new feature allows individuals who have completed the paper version of the INSIGHT Inventory to go online and enter their score totals without retaking the assessment. They can then generate their personalized e-INSIGHT Self Report. It’s a great seminar follow-up and personal study guide. There is a fee for the personalized reports that are generated, but it is a great combination.

Using the online e-INSIGHT reports.

- There are two online reports available. The Self Narrative Report and the Self Profile with Interpretive Booklet. They are purchased separately. Most facilitators select only one of the two, however they may also be used together in training situations where the combination fits the organizations talent development needs.

- The Self Narrative Report is written for the users. It focuses on strengths, trait overuse precautions, flexing strategies, and various ways for users to apply the information to improve their communication.

- The Self Report and Interpretive Booklet is a product very similar to the self-scoreable paper version. This report provides information about both extremes of each the four traits, has blank spaces for self reflection and notes and is written more generically to serve as a seminar workbook rather than a self-discovery report.
Complenting the self-scoreable paper assessment.

Instruct participants on how to complete the paper, self-scorable INSIGHT Inventory.

- Emphasize again that all the results are positive; therefore, users should be honest when checking the descriptive terms.
- Suggest that they press firmly when checking their responses so their marks show through on the scoring sheet of the two-part carbonless form. They may use either a pen or pencil.
- Encourage them to complete the Work Style column first and then complete the second column, the Personal Style. When finished, ask them to move to the second sheet and follow the scoring instructions.

Explain how to score the carbonless form.

- Point out that detailed instructions are provided on the scoring sheet. Often it’s helpful to demonstrate how to score a form by marking directly on a sample or slide image.
- Remind participants to be sure and use the numbers in the boxes on the scoring sheet. These are different—for statistical reasons—from the numbers on the first page.
- Note that no score total can be less than 8 or more than 48. Ask participants to recompute if their scores fall outside this range.

Chart the results in the INSIGHT Inventory booklet.

- If available, display an example of a completed chart to give participants a vision of the end product. Otherwise, direct them to the small image in the upper right corner of the page.
- Encourage participants to make large solid points and draw heavy dark lines connecting the points so the profiles are easy to read.
Overview the traits and trait intensity.

Give an overview of the four traits.

- Present a quick overview of the four traits. Emphasize only the general characteristics at this time.
- Explain that all people have these four traits. How they exhibit their preference on each trait is reflected by how far their score falls to the left or right of the center line.

Display the layout of the profile chart.

- Note how the colors of the traits are different and can be tracked throughout the reports, slides, and booklets.
- Mention that each scale has been statistically normed; therefore, the locations where the scores are plotted have different spacing.

Clarify the purpose of the shaded areas on the charts.

- Explain that the shaded areas provide an easy way to identify how strong a preference is.
- Read each of the descriptions of the shaded areas and reassure participants that scores at any location are fine. There are no good or bad, pass or fail scores.

Discuss what the overall profile shape conveys.

- Explain that “personality style” is the combination of trait preferences and the interactions of these preferences with each other.
- Describe the example. The person’s Work Style and Personal Style are different. She is Direct at work but Indirect at home. She remains Reserved in both settings. She is slightly Steady at work but very Steady at home. And she remains fairly structured and Precise in both settings.
- Note that they may spot shifts such as these in their own profiles. This will be discussed in more depth later.
Discuss how environmental pressures impact behavior.

- Point out that the INSIGHT Inventory acknowledges that people may behave differently in various settings (environments) because of how they react to different pressures and expectations.

- Note that the INSIGHT Inventory identifies behavior in two general environments, Work and Personal. There are also many smaller, more specific environments (church, sporting events, etc.) that might bring out other behavior.

- Emphasize again that the goal is to better understand general behavioral tendencies. It is important to avoid labeling oneself or others as always behaving a certain way.

Introduce the four trait descriptions.

Review the descriptions of opposite preferences.

- Ask participants to follow along in their booklet or self-report as you review the opposite characteristics on each of the four traits.

- Encourage participants to identify how well certain preferences describe them by checking or underlining any phrases they find particularly descriptive of them.

- Remind participants that the phrases describe the very extreme characteristics on each trait. It is unlikely that the descriptions will fit them perfectly.

- Collect stories and humorous material from your own life so you can make presenting this section personal and fun.
Review the descriptions of Scale A: Influencing

Provide an overview of Scale A

- Point out that all people have the ability to influence others and will tend to use either a Direct or Indirect approach. Emphasize that people using the Indirect style can be just as powerful and influential as people using the Direct style.

- Note that this scale provides an indication of how people assert themselves and “attempt” to influence others. It doesn’t mean they always succeed; it only describes their general tendency.

- Remind participants that given certain situations, pressures, or motivations, an Indirect person can be Direct and also, a Direct person can become Indirect. These aren’t mutually exclusive characteristics; they are on a continuum.

Review the descriptions of Indirect and Direct extremes.

- Present the slide and move through the traits one extreme at a time.

- Go back and note how each description is closely paired with an opposite on the other side.

- Add personal stories and examples or ask participants to share theirs. It’s often easiest to identify personal ones and then circle back and describe some that occur in the work setting.

Review the strengths of each preference.

- Keep the session strengths based and include any of the additional phrases.

  INDIRECT: creating harmony, minimizing conflict, negotiating peacefully, accommodating to buy time, willing to go second, pleasing others first, etc.

  DIRECT: pushing for results, holding others accountable, driving action, holding firm, focusing on tasks not emotion, saying no, setting boundaries, etc.
Review the descriptions of Scale B - Responding

Provide an overview of Scale B

- Note that Scale B, Responding, measures the classic introversion-extroversion dimension found on many personality instruments.

- Advise participants not to interpret Reserved as meaning shy or insecure. Reserved people can be self-confident, self secure, and enjoy others. However, they tend to choose to remain quiet in groups and may not openly share feelings.

- Note also that most Outgoing people need some alone and quiet time. However, they don’t need as much alone time as Reserved individuals. Plus, Outgoing people often tend to recharge and get energized when around others.

Review the descriptions of Reserved and Outgoing extremes.

- Present the slide and move through the traits one extreme at a time.

- Go back and note how each description is closely paired with an opposite on the other side.

- Add personal stories and examples or ask participants to share theirs. It’s often easiest to identify personal ones and then circle back and describe some that occur in the work setting.

Review the strengths of each preference.

- Keep the session strengths based and include any of the additional phrases.

  RESERVED: comfortable with silence without needing much attention or stimulation, non intrusive, willing to listen to others without need to talk much themselves, self-sufficient, etc.

  OUTGOING: attentive to others, noticing of other’s emotional state, good at connecting and building relationships, energetic and enthusiastic about people issues, sixth sense about others, etc.
Review the descriptions of Scale C - Pacing

Provide an overview of Scale C.

- This scale, Pacing, provides an indication of people’s style of making decisions and taking action. This dimension has a time component: fast and quick vs. steady and deliberate.
- Point out that the quality of a decision, whether it is good or bad, relates to the decision-maker’s knowledge and experience with the issue not the pace at which the decision was made.
- Emphasize that people with either the Steady or Urgent preference can make good decisions. However, the speed at which they make the decisions and the process they go through will be quite different.

Review the descriptions of Urgent and Steady extremes.

- Present the slide and move through the traits one extreme at a time.
- Go back and note how each description is closely paired with an opposite on the other side.
- Add personal stories and examples or ask participants to share theirs. It’s often easiest to identify personal ones and then circle back and describe some that occur in the work setting.

Review the strengths of each preference.

- Keep the session strengths based and include any of the additional phrases.

URGENT: puts energy to movement and change, willing to decide quickly and reassess results later, jumps in fast, brings variety and action to life, etc.

STEADY: puts energy towards stability, changes only after getting comfortable, establishes harmony and peacefulness, deliberates before deciding, brings security and consistency to life, etc.
Provide an overview of Scale D.

- Point out that how a person Organizes the details in their lives is an important component of this scale but, the scale is actually broader in nature. It also involves the need for structure, time management, and order.

- Emphasize that both Unstructured and Precise individuals can produce high quality results requiring precision. However, they will go about the process of completing a task quite differently, i.e. files vs. piles.

- Note that Unstructured people’s need for flexibility affects how they manage time. Time is approximate for them. On the other hand, Precise individuals tend to manage time by the clock. It’s an exact science for them.

- Point out that most Unstructured individuals have one or two areas in their life that they order and keep meticulously perfect. Likewise, most Precise individuals have an area or two that they let get disorganized.

Review the descriptions of Unstructured and Precise extremes.

- Present the slide and move through the traits one extreme at a time.

- Go back and note how each description is closely paired with an opposite on the other side.

- Add personal stories and examples or ask participants to share theirs. It’s often easiest to identify personal ones and then circle back and describe some that occur in the work setting.

Review the strengths of each preference.

- Keep the session strengths based and include any of the additional phrases.

UNSTRUCTURED: lives life in shades of gray rather than black and white, starts projects freely before organizing, sees creative ways around unneeded rules, etc.

PRECISE: able to draw clear lines in what otherwise looks like gray zones, good at finishing projects and wrapping up details, finds rules that help them navigate systems in creative ways, “use rules rather than fight them,” etc.
Discuss how environment affects behavior.

- Explain that many personality assessments try to predict behavior and hold that personality fixed and unchangeable. The INSIGHT Inventory instead maintains that behavior is also a reaction to environment.
- Point out that the INSIGHT Inventory is based on field theory. The underlying premise is that behavior is the function of personality within an environment.
- Discuss the various types of environmental pressures, expectations, stresses, that encourage or discourage certain behaviors.
- Ask participants to share examples of how certain environmental pressures cause them to change their behaviors. A great activity is to have them discuss this within breakout groups.
Review the various reactions to stress.

Explain typical reactions to stress.

- Stress throws people into atypical patterns of behaving. Usually, these exaggerated behaviors are attempts to cope, but they can strain relationships.

- Point out that people usually have one or two preferences they initially overuse when under stress.

- Core stress reactions—flight, fight, refuse, or freeze—play out differently in various personalities.

- Behavioral differences between personality traits show up more intensely when under stress.

Describe how each preference may react differently.

- Use the Stress Reaction slide to help participants better understand how people who have intense scores on certain scales may behave when under stress.

- Emphasize that people’s stress reactions show up when people, often unconsciously, believe that they won’t get what they need if they stay in their strength zone. For example, Steady people prefer to have time to think things over and consider all options before deciding. When pressured to decide quickly, they feel stressed and may delay deciding to regain control.

- Give participants an overview by discussing each of the overuse reactions.

- Encourage participants to share examples of: 1) what stresses them, 2) how this relates to one or more of their strongest preferences, and 3) how they tend to react.

- To go even deeper, ask participants to identify what co-workers and family can do to help them alleviate their stress. Some will want action, others will ask to be left alone, etc. Planning ahead helps.
Insight Inventory – Self

Discuss how traits can be counter productive under stress.

- Point out that it’s important for participants to know how they react when under stress, but it’s also critical to know how others react under stress and how to avoid taking their behavior personally.

- Help participants improve their skills at identifying when others are under stress (body language, tone of voice, etc) and how this impacts their own behavior.

Discuss Examples

Example 1: This person will tend to become more Indirect and may cause him to avoid conflict, not speak up, or agree when he doesn’t really support an idea. He is also very Steady and may postpone decisions and delay taking action when stressed. Since he is also Precise, stress may cause him to become rather compulsive or rule bound.

Example 2: Under stress, this individual may move from Direct and straight forward to autocratic and aggressive. He is Urgent and this may shift from a preference for fast action to impatience and reactivity. His Unstructured preference on Scale D may cause him to break rules he would normally follow.

Introduce the concept of Triggers and Hot Buttons

Discuss the meaning of triggers and hot buttons.

- Triggers and hot buttons are intense and very quick reactions to certain behaviors in others. They cause people to move away from their strengths.

- People often get known for their triggers more than their strengths. This is because these triggers are emotional and “hot” and therefore much more memorable and impactful, even if not helpful.

- Don’t let participants get hung up over semantics or wording. Hot buttons, triggers, or blowups are the same general things; they are flash reactions without pauses for thinking.
Help participants identify their triggers and hot buttons.

- Note that a wide variety of behaviors may trigger an excessive reaction. This slide identifies many examples that people may relate to or find are in fact hot buttons of their own.

- Triggers often trace back to incidents in childhood and old patterns of interactions with parents, siblings, or school mates. When people identify their triggers they may want to describe how these developed. Encourage this but try not to go into too much depth, this is a process of awareness, not counseling.

Discuss what it means to “Move Out of Strengths.”

- All the characteristics and descriptions used by the INSIGHT Inventory are positive and strengths based. Shifting away from these and using ineffective behaviors or even destructive reactions is called “moving out of your strengths.”

- Emphasize that it’s important to not get known for your triggers. Others tend to remember when you overreact and may label you by these behaviors rather than your strengths.

- Ask for examples and encourage open discussions.

Explore how the Change Cycle can help unravel triggers

- The well known cycle for making changes, Awareness, Understanding, and Action can work with triggers.

- In the Awareness phase, help participants identify their triggers, the behaviors that cause them to explode, leave, avoid, or overreact. Suggest making a list.

- Use the Understanding phase, to help discover where the trigger developed. Spotting the situation and rethinking their “old” reaction as a survival technique helps participants own the solution they developed earlier in life. Don’t over analyze; spot and move on.

- In the Action phase, identify new, desirable patterns and strategies for remembering to use them, i.e. avatars, music cues, catch phrases, etc.
Discuss the meaning of the term “flexing.”

- Point out that this program uses the term “flexing” to mean to temporarily change one’s style (or behavior) to communicate differently with various people.

- Note that some programs use the words “versatility,” “adaptiveness,” or “style shifting” to refer to a similar concept.

- Ask participants to discuss why it is challenging to “flex” even at those times they know it would be helpful. Anticipate responses such as, “It can be hard and thankless work,” “I want the other person to do it.” “I simply forget and focus on what I’m trying to say and don’t realize how I’m coming across.” etc.

Identify strategies for flexing to communicate with Opposites.

- Note to participants that at one time or another they will probably have to communicate with someone who is opposite from them on one or more traits. They will need to be aware of the challenges.

- Ask participants to discuss the differences between the traits on HOW things are said as opposed to WHAT is actually said.

- Sometimes the Platinum Rule applies. “Do unto others as they would have you do unto them.”

- An excellent activity is to have participants break into small groups according to one of their strongest trait scores. Then ask these groups of like minded individuals to identify how they want others to communicate with them. In essence this is telling others how to flex for them. Then, ask groups to share their advice.
Discuss complementary vs. conflict issues with Opposites.

- The formula, \(1 + 1 > 2\) holds that when two people bring different strengths together their performance exceeds what two similar people might achieve.

- Point out that often people having opposite traits complement each other and bring energy and different perspectives to their work and personal relationships.

- The formula \(1 + 1 < 1\) suggests that when there is conflict because of different traits, individuals get less done than they would had they been working alone.

- Ask participants to review the example of Person A and Person B and comment on how they might complement or conflict.

Identify strategies for flexing to communicate with people having Similar styles.

- Note that everyone will, at one time or another, need to “flex” to avoid communication problems that occur between two individuals with similar styles.

- Ask participants to share what issues they have seen arise between two people who are the same on a particular trait.

- Be sure to emphasize the positive also. Two like minded people can often relate well and work very productively together. They often do. Ask for examples.

Practice identifying both supporting strengths and problems between two people with similar styles.

- Ask participants to predict how Person C and D will work well together; emphasize strengths.

- Next, ask participants to discuss what conflicts may emerge over time when values or priorities differ.
Additional practice identifying both supporting strengths and problems between two people with similar styles.

- Ask participants to predict how Person E and F will work well together. These two profiles are almost the exact opposite of those presented in the previous slide.
- Then, ask participants to discuss what conflicts may emerge over time when values or priorities differ.
- If time is short, have some observations of your own thought out and present them quickly.

**Personalizing flexing concepts.**

**Communicating Strategies, Example 1**

- Ask participants to identify what communication behaviors might be most effective with the person in Example 1.
- Next, ask participants to look at their own Work Style profile and imagine they are needing to suggest a change in policy and procedure to the person portrayed in Example 1. Ask them to identify what traits they personally might need to flex to best communicate with this person.

**Communicating Strategies, Example 2**

- Repeat this activity with a different profile. Example 2.
- Ask participants to identify what communication behaviors might be most effective with the person in Example 2.
- Next, ask them to identify what traits they personally might need to flex to best communicate with this person.
Create a team chart of member’s profiles.

Explain the purpose of creating a team profile chart.

- Introduce how the team profile chart enables teams to quickly visualize personality similarities and differences among team members.
- Draw each team member’s profile and go around the room and ask each team member to:
  - Identify each person’s strengths:
  - Discuss how they could communicate better:
- Note that for many individuals this is the first time they have heard fellow team members personally say to them what they are seen as contributing, and hear ideas on how they can better work together. This powerful activity can change the dynamics of team functioning.

Create an action plan

Guide participants through a summary of key points.

- Ask participants to identify and then share a key take away or insight they gained from the program.
- Encourage participants to list a new behavior they plan to take action on, a plan they have for communicating better with someone on their team or family.
- Ask them to share. This can be done in conjunction with the “insight” from the previous bullet, or separated into two different, but supporting closing activities.

End strong

Plan a memorable ending that captures participants attention.

- Identify a poem, song, music video, or slide image that helps you end on a strong, positive note.
- One option is to present the corporate values that this program was selected to help participants practice. Create slides and show these perhaps with music or messages from corporate leaders to build the connection between the program objectives and the time the participants invested.