

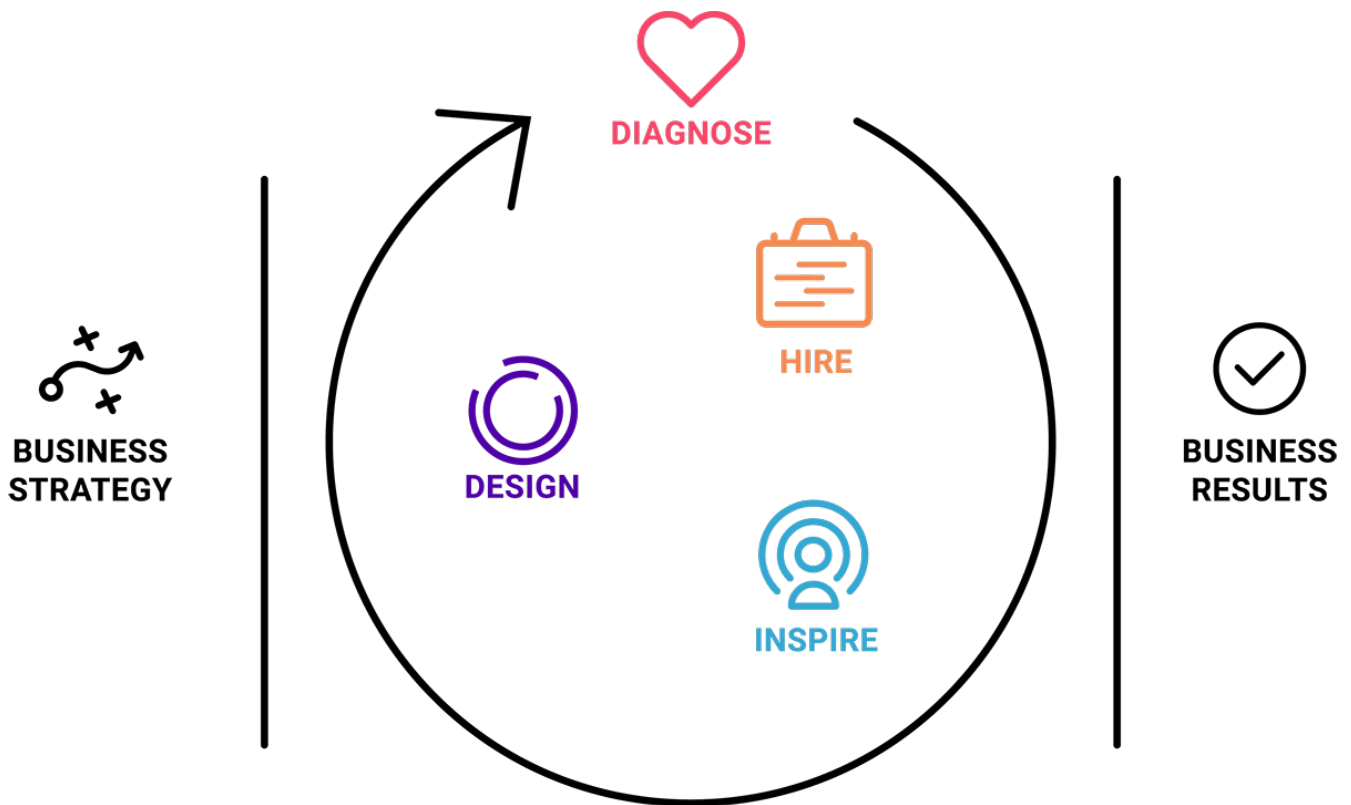
# Everything Predictive Index (PI) Workbook

## Handout

- 1. What is the Predictive Index Behavioral Assessment**
- 2. Characteristics of a Successful Manager**
- 3. Behavioral Drives**
- 4. Understanding the PI Graph**
- 5. Dominance Behaviors (A)**
- 6. Extraversion Behaviors (B)**
- 7. Patience Behaviors (C)**
- 8. Formality Behaviors (D)**
- 9. Understanding Your Leadership Style**
- 10. The 17 Reference Profiles**
- 11. Improving How You Motivate Others**
- 12. What Motivates You**
- 13. PI Motivation Playbook**
- 14. Action Plan for Creating a Motivating Environment**
- 15. Influencing Team Members**
- 16. Takeaways – Action Steps**

# 1. What is the Predictive Index (PI) Behavioral Assessment?

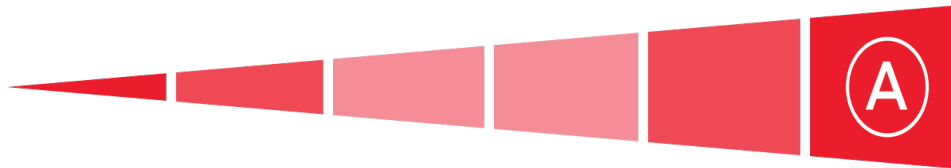
Take notes on what you learn from the video



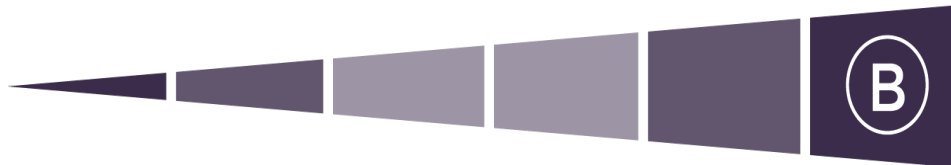
## 2. Characteristics of a Successful Manager

Document the characteristics of a successful manager based on your experiences and the experiences of the group:

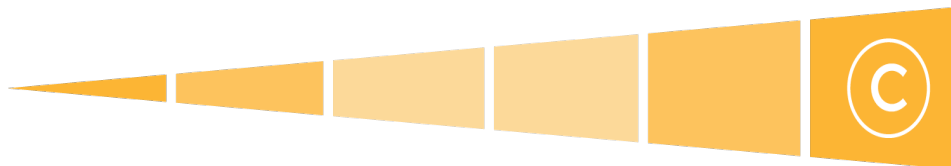
### 3. Behavioral Drives



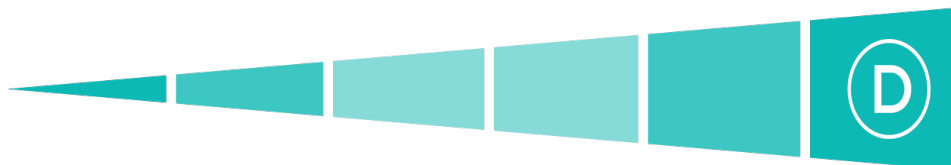
**Dominance:** The drive to exert one's influence on people or events



**Extraversion:** The drive for social interaction with other people



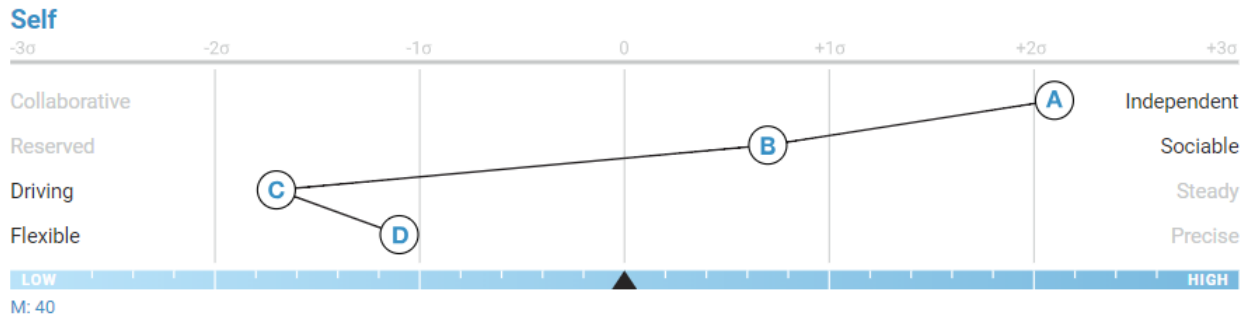
**Patience:** The drive for consistency and stability



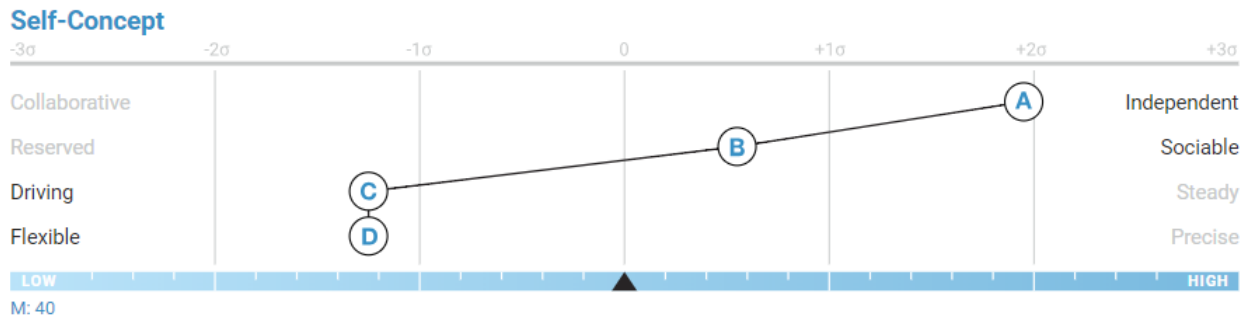
**Formality:** The drive to conform to rules and structure

# 4. Understanding the PI Graph

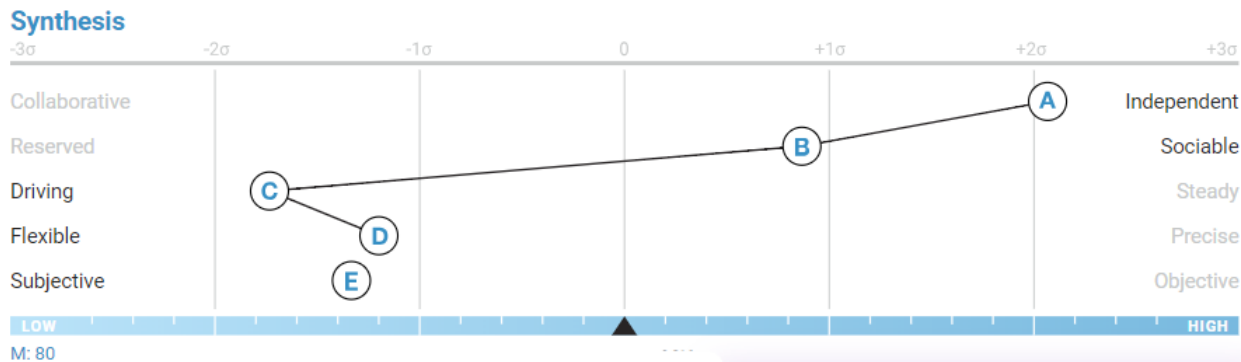
## Behavioral



**True Self:** That you yourself believe really describe you.

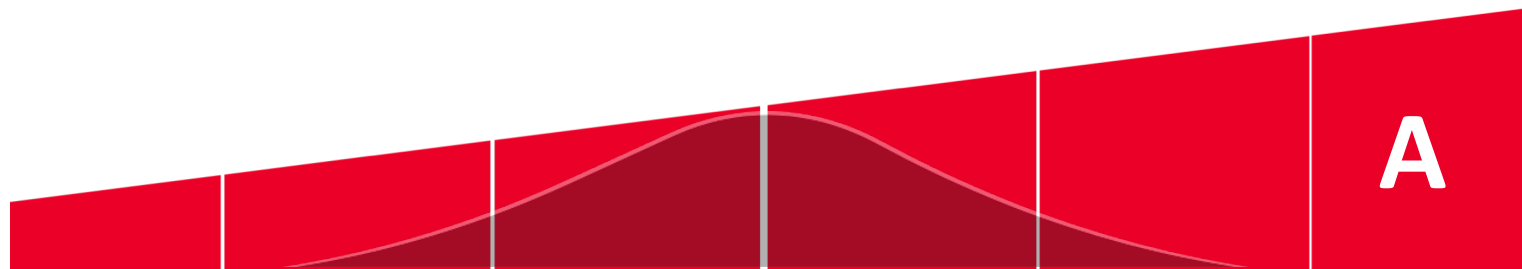
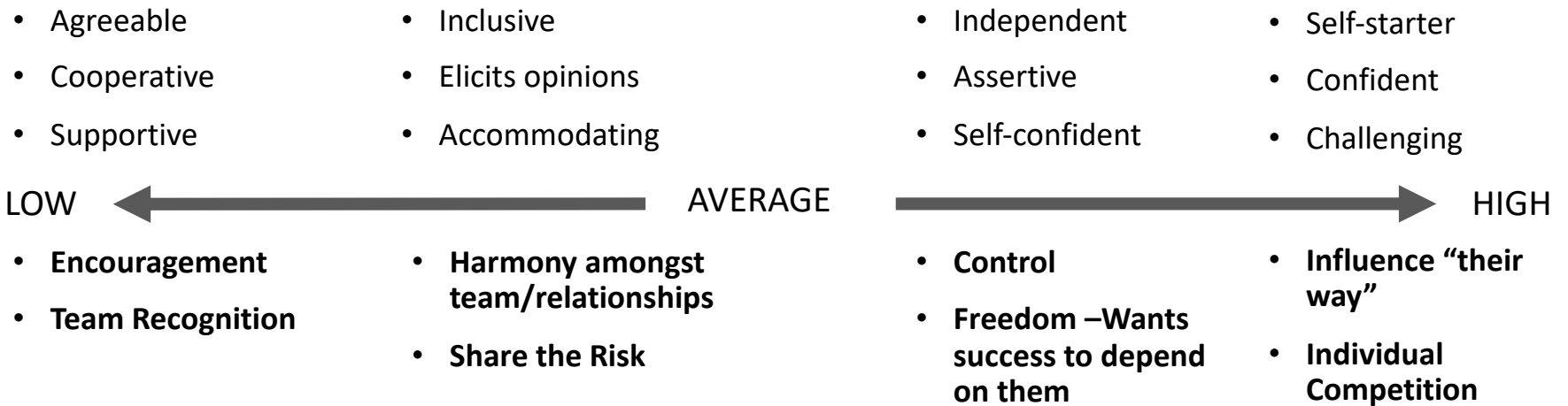


**Self-Concept:** The way you are expected to act by others.

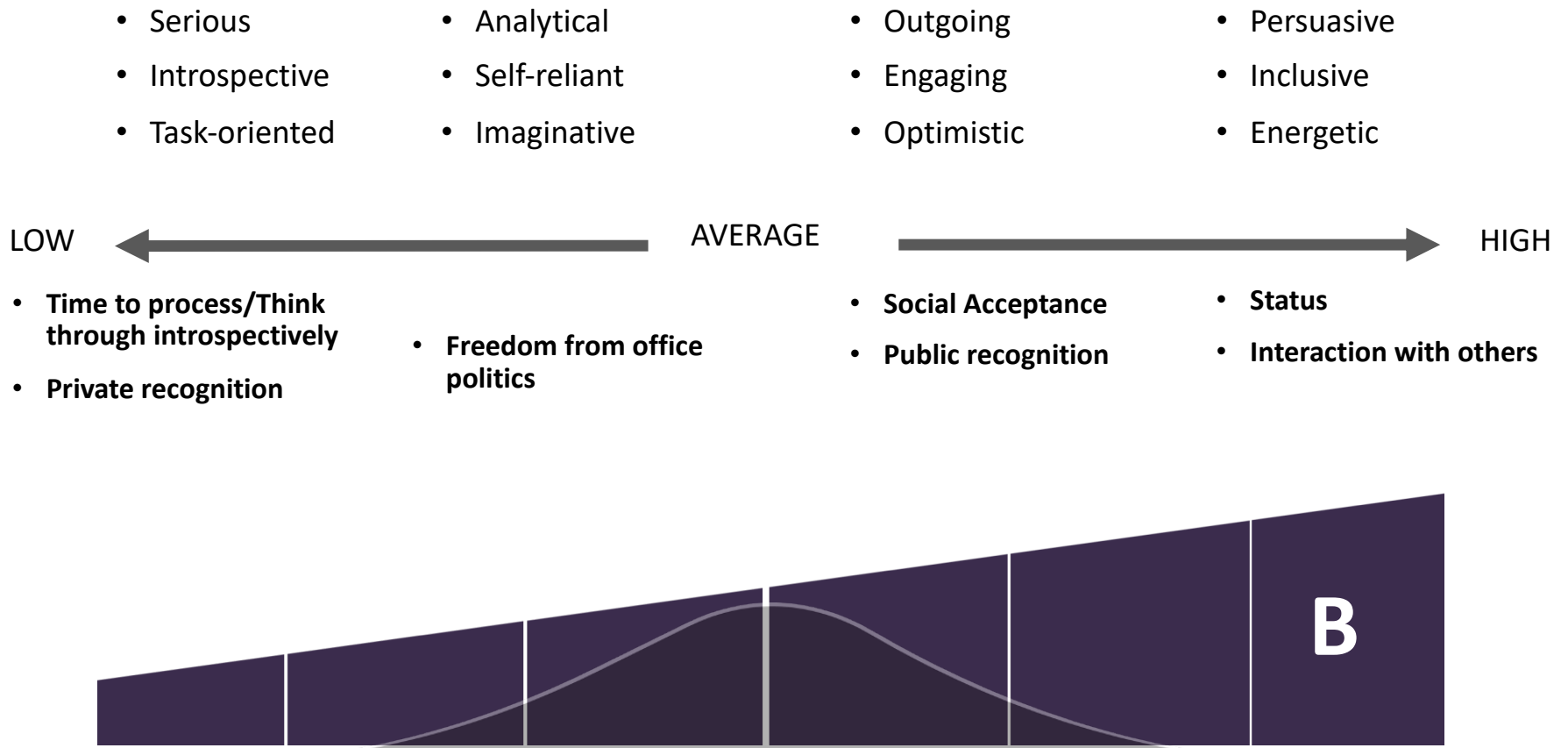


**Synthesis Graph:** Combination of True Self and Self-Concept

## 5. Dominance Behaviors (A)



## 6. Extroversion Behaviors (B)



## 7. Patience Behaviors (C)

- Tense
- Restless
- Multi-tasker

- Driving
- Fast-paced
- Sense of urgency

- Relaxed
- Steady
- Consistent

- Responsive
- Patient
- Calm

LOW



AVERAGE



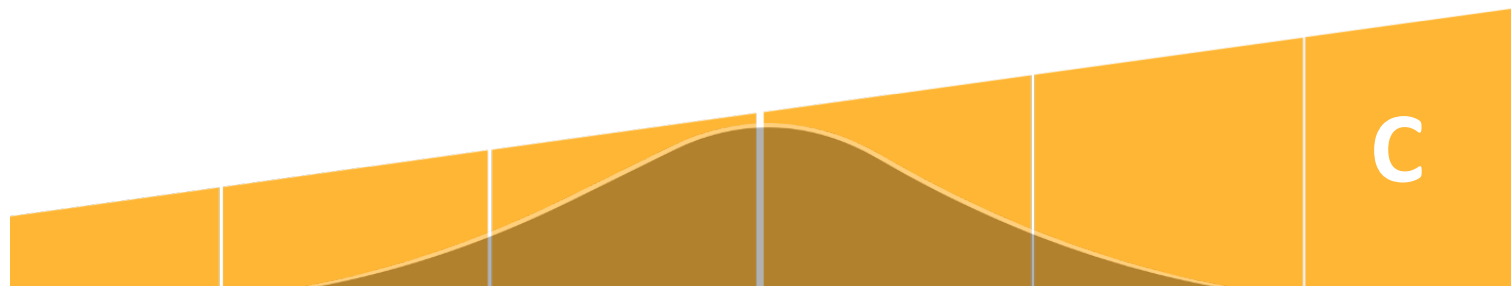
HIGH

- **Variety**
- **Change of pace**

- **Mobility**
- **Freedom from Repetition**

- **Security**
- **Stable work environment**

- **Familiar processes/systems/ people**
- **Recognition for loyalty**



## 8. Formality Behaviors (D)



## 9. Understanding Your Leadership Style

Identify your highest drive and your lowest drive on your PI Behavior Report: \_\_\_\_\_

- How do they impact the way you communicate, make decisions, and approach change?
- What are the strengths that your leadership style brings to the organization?
- Describe a situation where the style worked in your favor.
- Where do potential weaknesses exist?
- Describe a situation where this affected the team.
- How should you adapt your approach to someone with the opposite styles?
- What insights have you gained about yourself? How do these insights impact or affect your role as a leader?
- Who would I be willing to share this with and why? When will I share it?

## 10. The 17 Reference Profiles



**Adapter**



**Altruist**



**Analyzer**



**Artisan**



**Captain**



**Collaborator**



**Controller**



**Guardian**



**Individualist**



**Maverick**



**Operator**



**Persuader**



**Promoter**



**Scholar**



**Specialist**



**Strategist**



**Venturer**

# 11. Improving How You Manage Others

- Select an employee on your team who is either a high performer you want to manage more effectively or a struggling employee that needs your help. Write down your reflections below.
  
- What are three things you are already doing to manage this employee the way they want to be managed?
  
- What are three strategies you can apply to more intentionally manage this employee based on their motivating needs and styles?
  
- Based on your own behavioral drives and needs, what might prevent you from applying these strategies?
  
- In order to hold yourself accountable, set a date to reevaluate your progress.

## 12. What Motivates You

Read the phrases below. Then check two that you find most motivating at work.

- Taking on new challenges
- Solving problems
- Knowing I made other people happy
- Meeting new people
- Being in charge
- Building connections with coworkers
- Making steady progress toward goals
- Being able to express my opinions freely
- Getting public recognition
- Analyzing all the options
- Working on team projects
- Being in a constantly changing environment
- Helping others succeed
- Getting closure on projects
- Doing a high-quality job
- Being in the limelight
- Taking risks
- Being the expert on a topic
- Producing concrete results
- Having freedom to do things my way

# 13. PI Motivation Playbook

Drive	Low	High
<b>A Dominance</b>	<ul style="list-style-type: none"> <li>- Create opportunities for team competition, find ways that we all win together</li> <li>- Work with them to develop a solution to the problem, challenge, situation</li> <li>- Provide clear options, recommend solutions and walk through them together</li> <li>- Ask what they think they should do and then, in a supportive way, confirm their choice</li> <li>- Mitigate risk, share it, have their back, be there to take the heat</li> <li>- Don't compare them to others and make them feel less than or having to compete against</li> <li>- Don't challenge them</li> </ul>	<ul style="list-style-type: none"> <li>- Create opportunities for individual competition, me versus you!</li> <li>- Challenge them to identify a solution to the problem, challenge, situation</li> <li>- Give them options, they prefer to make choices - do not tell them what to do</li> <li>- Ask "What do you think," "What have you thought of," "Would you like some help with that?"</li> <li>- Be willing to let them take a risk, drive toward a big goal, challenge them to it</li> <li>- Show them where they rank against others, they like to win, to compete, play them against others</li> <li>- Challenge them</li> </ul>
<b>B Extraversion</b>	<ul style="list-style-type: none"> <li>- Give recognition in private, 1-1, send the email to them, copy the important individual – not the whole company, be specific about what the praise is for</li> <li>- Don't ask for immediate response, give them time to think and process</li> <li>- Allow them to think things through, to be processed internally</li> <li>- Provide an agenda ahead of time, write it down, email it, or at least follow up with something written for later review</li> <li>- Stay on task when speaking, be specific</li> <li>- Realize that it will take time to build the relationship, you will need to develop trust over time</li> <li>- Provide data, examples, in advance when possible</li> </ul>	<ul style="list-style-type: none"> <li>- Give them public praise, frequently, send the email to the team, the company, celebrate success openly, include others</li> <li>- Ask them for "What do you think," allow them to share lots of ideas openly</li> <li>- Let them talk it out, talk through the options, they speak to think, allow for external processing</li> <li>- Do the drive by! Call or meet with them daily to ask "How's it going", they want to know you are thinking about them</li> <li>- Make small talk, connect with them, ask about stuff</li> <li>- Communicate 2-3x what you think you need to, the higher the B</li> <li>- Don't provide too much data!</li> </ul>
<b>C Patience</b>	<ul style="list-style-type: none"> <li>- Set deadlines and create a sense of urgency, they respond positively to pressure, need pressure!</li> <li>- Meet frequently for short touchpoints</li> <li>- Provide planned interruptions! Shake it up!</li> <li>- Keep your meetings moving, cover multiple topics, use an agenda to make sure you get all topics covered</li> <li>- CHANGE? They need it, let them be a part of it, keep it coming...</li> <li>- Allow them to choose what to do and when to do it</li> </ul>	<ul style="list-style-type: none"> <li>- Set the deadline but try not to change it, changing deadlines frustrates and takes them out of their routine</li> <li>- Meet on a regular schedule, be predictable</li> <li>- Limit your interruptions, try to batch your hand offs</li> <li>- Schedule sufficient time for meetings, you need to listen and be patient, allow for full discussion</li> <li>- CHANGE? Share the WHY behind changes, build a process for adoption of new stuff</li> <li>- Be consistent and create some predictability</li> </ul>
<b>D Formality</b>	<ul style="list-style-type: none"> <li>- Don't send them lengthy emails, they won't read it</li> <li>- Provide clear direction, be specific but without too much detail and info – discuss the key non-negotiables!</li> <li>- Let them choose how to do it, don't give too many specifics, details</li> <li>- Allow for freedom of choice – let them pick a direction</li> <li>- Don't overwhelm with too much information – keep it simple and focused</li> <li>- Have an agenda but keep it to a few specific items – you want to keep them focused and avoid distraction!</li> <li>- Give recognition for finding new alternatives or options</li> <li>- Tell them when it does not depend, be clear</li> </ul>	<ul style="list-style-type: none"> <li>- Send it in writing, either before or as follow up!</li> <li>- Provide clear direction, be specific and provide an opportunity for questions, give lots of info!</li> <li>- Walk through the plan with them, develop it together and map it out</li> <li>- Spell it out – walk through the road map of how to do it</li> <li>- The more information you provide, the sooner, the better</li> <li>- Have an agenda – they want to know what is going to be discussed, they want to prepare and check stuff off</li> <li>- Give recognition for doing things "right," reinforce this</li> <li>- Limit ambiguity – don't give too many options or talk about... "it depends"</li> </ul>

## 14. Action Plan for Creating a Motivating Environment

Employee Name:

PI Profile:

Use what you've learned in this workshop and the information on the Motivation Playbook on page 14 of your workbook to write an action plan for creating a more motivating environment for him or her.

### STEP 1: UNDERSTAND THE CURRENT ENVIRONMENT

Read the appropriate section of the Motivation Playbook to learn about this person's motivational needs.

Write down ideas, words, or phrases as you read that apply to your current interaction with this person.

### STEP 2: PLAN TO CREATE A MORE MOTIVATING ENVIRONMENT

Discover strategies for creating a motivating environment for this person.

Write down two bulleted statements that you think will make the greatest positive impact on this person's motivation.

Write down specific actions you will take to use these strategies to make the work environment more motivating.

# 15. Influencing Team Members

- You plan to connect with team member 1 and team member 2 to pitch an idea to them.
- You are meeting with them at different times.
- Before meeting with either of them, review their PI's and develop a plan for the meetings

<p><b>What is this person's motivating needs?</b></p>		
<p><b>How would you describe their natural communication style?</b></p>		
<p><b>Given what you discovered above, what's your general approach to the conversation?</b></p>		
<p><b>You need to be sure to provide this person with... <i>Why?</i></b></p>		
<p><b>When influencing to this person, you should...</b></p>		

**One word to keep in mind when communicating with this person:**

\_\_\_\_\_

## 16. Takeaways – Action Steps

**WHAT ARE YOUR MAIN TAKEAWAYS FROM THIS WORKSHOP?**

**WHAT ARE THE 3-5 ACTIONS STEPS YOU ARE GOING TO IMPLEMENT IN THE NEXT FOUR WEEKS?**