

CLIENT CONVERSATIONS ~ WITH A PERSONALITY ADVANTAGE

TAKING CLIENT ENGAGEMENT TO NEW LEVELS



ENGAGEMENT





PERSONALITY SYSTEMS COMPARED – COLOR SYSTEMS

Personality Lingo®	Connector	Thinker	Planner	Mover
Hippocrates	Phlegm	Yellow Bile	Black Bile	Red Blood
Don Lowry's True Colors	BLUE	GREEN	GOLD	ORANGE
Color Lingo	BLUE	GREEN	GOLD	ORANGE
Personality Dimensions	BLUE	GREEN	GOLD	ORANGE
Insight Learning	BLUE	GREEN	GOLD	ORANGE
Four Lenses	BLUE	GREEN	GOLD	ORANGE
Four Windows	BLUE	GREEN	GOLD	ORANGE
Real Colors	BLUE	GREEN	GOLD	ORANGE
Spectrum Temperaments	BLUE	GREEN	GOLD	ORANGE
Personality Resources	BLUE	GREEN	GOLD	ORANGE
Color Code	BLUE/WHITE	RED	Blue – N/A	YELLOW
Herrmann Brain	RED	BLUE	GREEN	YELLOW
Ritberger	ORANGE	GREEN	RED	YELLOW
Birkman	GREEN	BLUE	RED	YELLOW

WORD DESCRIPTOR SYSTEMS

Personality Lingo®	Connector	Thinker	Planner	Mover
Ancient Greeks	Fire	Water	Earth	Air
Galen	Phlegmatic	Choleric	Melancholic	Sanguine
Carl Jung	Intuition/Feeling	Intuition/Thinking	Sensing (/Judging*)	Sensing (/Perceiving*)
Seasons	Summer	Winter	Autumn	Spring
Keirsey	Idealist	Rational	Guardian	Artisan
Keirsey/Bates	Apollonian	Promethean	Epimethean	Dionysian
Diet Styles	Diet Feeler	Diet Thinker	Diet Planner	Diet Player
Inner Hero	Helper	Thinker	Planner	Doer
Helen Fisher	Estrogen/Oxytocin	Testosterone	Serotonin	Dopamine
Helen Scully	Facilitator	Innovator	Organizer	Liberator
Character Champions	Blue Dolphin	Green Owl	Gold Ant	Orange Wolf

LETTER SYSTEMS

Personality Lingo®	Connector	Thinker	Planner	Mover
Myers – Briggs	ENFJ, INFJ ENFP, INFP	ENTJ, INTJ ENTP, INTP	ESTJ, ISTJ ESFJ, ISFJ	ESFP, ISFP ESTP, ISTP
Keirsey Temperament	NF	NT	SJ	SP

OTHER SYSTEMS

DISC	D Dominance	I Influence	S Steadiness	C Conscientiousness
Personality Lingo	Mover/Thinker	Connector/Mover	Planner/Connector	Thinker/Planner
COLORS	Orange/Green	Blue/Orange	Gold/Blue	Green/Gold
Keirsey	SP/NT	NF/SP	SJ/NF	NT/SJ

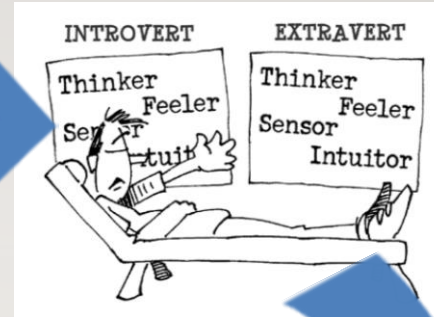
ENNEAGRAM

1	2	3	4	5	6	7	8	9
Planner	Connector	Planner/Connector	Connector	Thinker	Thinker	Mover	Planner	Connector
SJ	NF	SJ/NF	NF	NT	NT	SP	SJ	NF

EXTROVERTS VS INTROVERTS

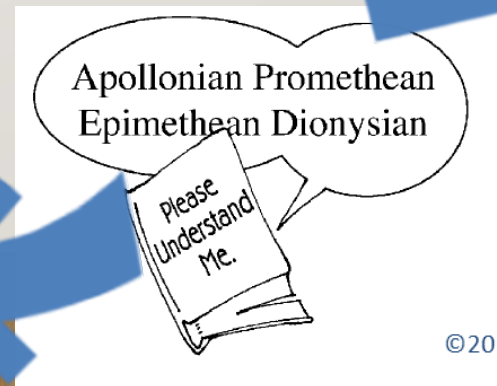


The evolution of PERSONALITY LINGO



Myers-Briggs

	ISFJ	INFJ	INTJ
ISTP	ISFP	INFP	INTP
ESTP	ESFP	ENFP	ENTP
ESTJ	ESFJ	ENFJ	ENTJ



Sanguine
ESTP Dionysian **SP** ISFP ISTP
MOVER Sensing
Artisan
Perceiving **ORANGE** ESFP

Sensing ESTJ **SJ** ISFJ
Guardian Judging
PLANNER ESFJ
Melancholic **GOLD** ISTJ Epimethean

ENFJ **NF** ENFP Intuition
Idealist INFJ Feeling
CONNECTOR
Phlegmatic INFP **BLUE** Apollonian



Intuition **INTJ** **NT** **ENTP** Thinking
Rational **ENTJ**
THINKER **CHOLERIC**
Promethean **INTP** **GREEN**

MOVER

(SP ORANGE)

- **Playful**
- **Spontaneous**
- **Seeks Variety**

Core Value - FREEDOM



PLANNER (SJ GOLD)

- Prepared
- Punctual
- Relies on Rules

Core Value - RESPONSIBILITY



CONNECTOR (NF BLUE)

- Peacemakers
- Caring
- Optimistic

Core Value - RELATIONSHIPS



THINKER (NT GREEN)

- **INNOVATIVE**
- **“WHY?”**
- **Crave Knowledge**

Core Value - COMPETENCY

CLUES

- What do you see?
- What do you hear?
- Check the environment



CONVERSATIONAL CLUES



QUICK QUIZ



FINANCIAL PREFERENCES

- Thinker
 - Money is a Tool
 - Be strategic
- Mover
 - Money is a Toy
 - Have fun
- Planner
 - Money is a Treasure
 - Be safe
- Connector
 - Money is a Token
 - Make it easy

FINAL EXAM

Name the predominant personality in each of the following scenarios:

1. The report is due tomorrow. Carol started working on it 2 weeks ago and put the completed report in a binder tonight. PLANNER
2. Jackie has some spare time and chooses to sit by herself reading Michael Lewis' book "The Big Short". THINKER
3. John has arranged for a candlelight dinner at a cliff-side café overlooking the ocean. CONNECTOR
4. Ralph adds humour and energy to the office. You never know what he'll do next! MOVER

CLIENT CONVERSATIONS ~ WITH A PERSONALITY ADVANTAGE

TAKING CLIENT ENGAGEMENT TO NEW LEVELS

