

PERSONALITY AI FOR CONSULTING

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Intro

Advise Clients Effectively

ADVISE CLIENTS EFFECTIVELY

It can be challenging to help other people and businesses reach their full potential, especially if you don't have much time to get to know a client and understand what they may be doing well and what may need improvement. Discussing the nuances of different problems and advising clients on how to best grow can also be a tricky situation, since people can interpret feedback in different ways.



When your job involves regularly working closely with people, it's important to pay close attention to your interpersonal skills. Effective communication can mean the difference between helping a client succeed and losing their business. The best way to ensure you're communicating well with each client is by understanding personality. More specifically, understanding their personality. Once you're able to better understand yourself and your clients, you can learn to empathize with and adapt to their personality and have effective communication with them.

The best way to do this is by understanding personality.

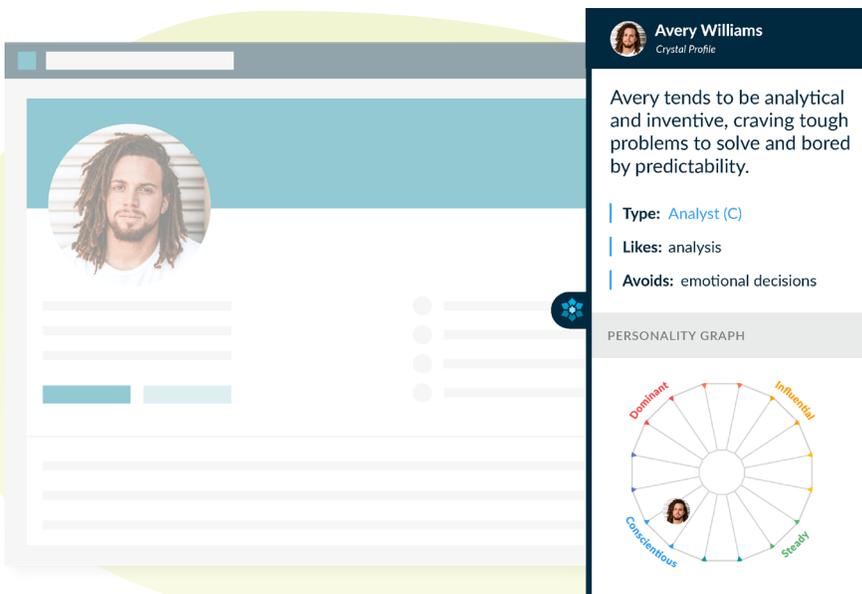
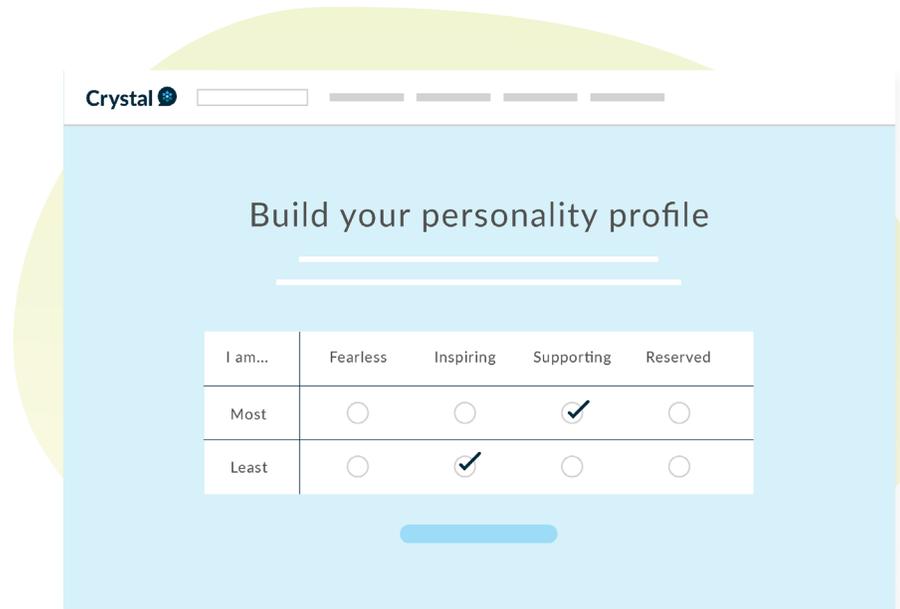


Section 1

Understanding Personality

UNDERSTANDING PERSONALITY

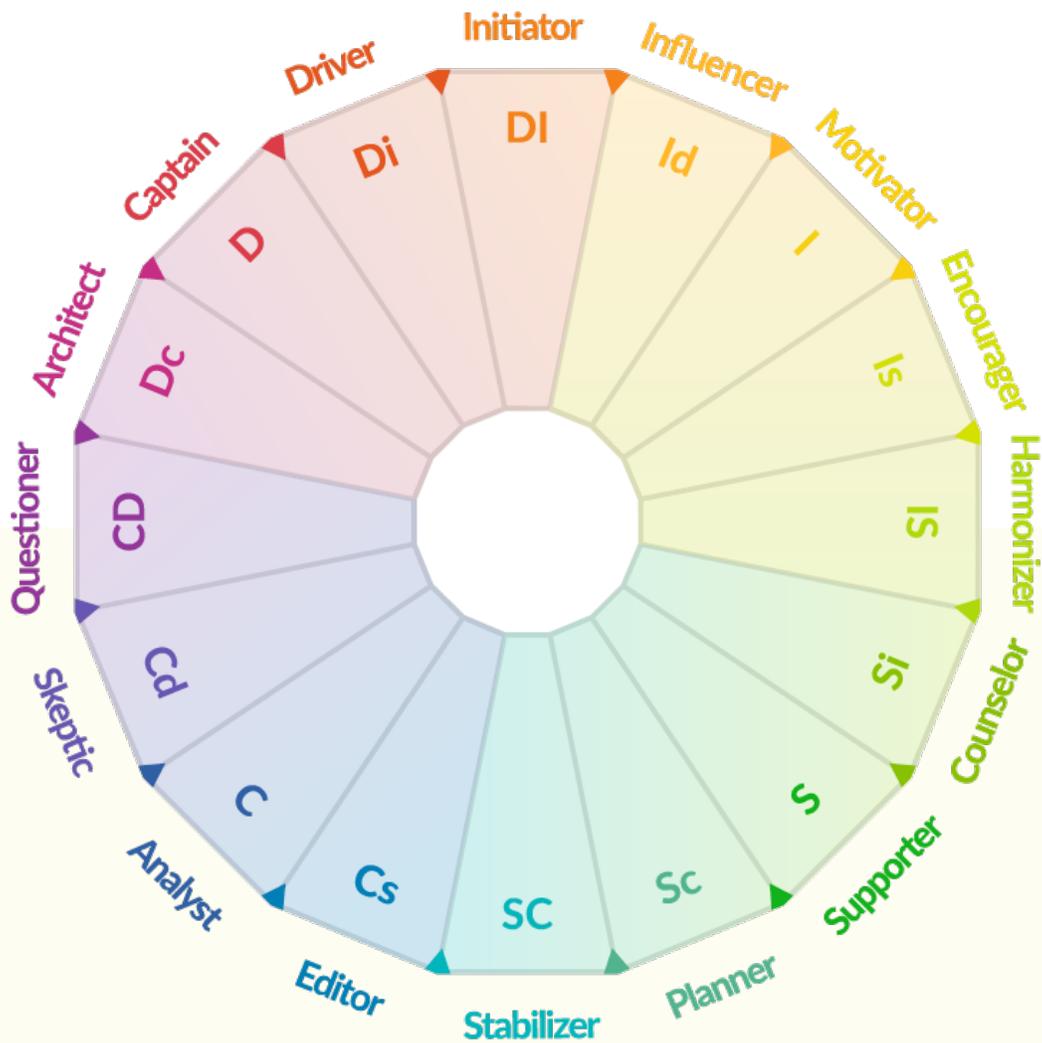
When working with others, it's important to have a good understanding of who they are. You can do this by either having them take a short personality assessment or by predicting their personality using a new technology known as Personality AI.



Personality AI analyzes publicly available information on websites like LinkedIn to predict someone's personality, using artificial intelligence and machine learning. So you can unlock insights into their natural likes, dislikes, strengths, weaknesses, communication style, and more. Each insight can help you work better with those around you. Personality AI and assessments allow anyone to improve their communication and build stronger relationships, all based on the core principle of empathy.

Without getting too technical, when Crystal determines someone's personality, it uses a framework called DISC to classify their personality into a few categories which we refer to as D (dominance), I (influence), S (steadiness), and C (conscientiousness). Each of us has a primary DISC type in one of these categories and sometimes a secondary DISC type in another. To keep things simple, we separate these into easy-to-remember labels called Archetypes.

You can see them all on this graphic called the Personality Map:



Below is a breakdown of common personality traits within each of the categories in DISC.

D Personality Types: *Captains, Drivers, Initiators, Architects*



- Motivated by control over the future and personal authority
- Tend to prefer instant, concrete results and having an advantage over competition
- Communicate clearly and succinctly

I Personality Types: *Influencer, Motivator, Encourager, Harmonizer*



- Motivated by innovative, unique, creative ideas and excited by the future
- Tend to prefer building new relationships and experiences
- Communicate in a casual, expressive way

S Personality Types: *Counselor, Supporter, Planner, Stabilizer*



- Motivated by peace, safety, and others' wellbeing
- Tend to prefer security, reliability and trust
- Communicate in a friendly and genuine way

C Personality Types: *Editor, Analyst, Skeptic, Questioner*



- Motivated by logic, information, and problem solving
- Tend to prefer accurate information and quality solutions (quality over quantity)
- Communicate in a business-like, fact-based way

These differences are extremely important for your approach in every conversation with a client. For example, a client who is a warm, people-oriented Supporter (S) is less likely to engage in a discussion about facts and data. They'd usually prefer to engage in more personal, get-to-know-you conversation or listen to helpful, well-thought-out personal advice. An Analyst (C), on the other hand, tends to enjoy learning more about specific, concrete information.

By identifying someone's personality type, you can learn how to best communicate with and teach them.



UNDERSTAND YOUR STYLE

Before you start applying personality insights to your clients, it's important that you begin by understanding yourself. By learning more about your own communication and consulting style, you can begin to practice more effective communication with others.



D-type consultants are likely to be results-oriented and confident people, who tend to enjoy leading the conversation. D-types often have high expectations of themselves and others, and will likely use a direct, assertive tone to make a point. When advising others, they tend to focus on clearly and straightforwardly communicating any problems.



I-type consultants tend to be more creative and outgoing. They are usually fans of getting to know others and excitedly brainstorming new ideas. I-types are more likely to crack a lot of jokes and use compelling stories to teach. They are very friendly, spontaneous people, which may create a very fun, experimental consulting style.



S-type consultants are likely very supportive and encouraging. They tend to be hands-on and helpful when working through problems with others. They enjoy helping people grow at a steady pace. S-types tend to calmly offer well-thought-out advice when consulting. They will likely show patience by spending as much time and effort as it takes to help everyone fully grasp a concept.



C-type consultants tend to be very analytical and focused. They like to share all relevant information, but may seem fairly reserved around clients. C-types often speak in a very formal, businesslike manner and are likely to give step-by-step overviews of how something should be done. They may be particularly effective at explaining the intricacies of complex topics.

When you're aware of your natural communication style, you can better understand how to advise others in a way that makes an impact and helps them learn more effectively. Adjusting your communication style and reaching each client in an empathetic, understanding way can help you improve your consulting effectiveness.



Section 2

Improving Communication with Clients

IMPROVING COMMUNICATION WITH CLIENTS

Once you understand your own communication style, you can begin to learn more about your clients' natural styles so you can practice communicating in a way that better suits each of them. By communicating in a way that makes sense to your clients, you can help them understand what you're teaching more quickly. Rather than having some concepts be mis-understood or missed entirely, you can be sure you're getting points across in a way they will understand. Here's how to do that for your different client personalities.

D Client Types

Captains, Drivers, Initiators, Architects

If you're working with a D-type client, try using phrases like:

- The end result should be...
- This will be the tough part...
- These are the most important steps...
- You can try this part on your own...



Do

- Be clear about the end result
- Give them a time to ask questions
- Order the steps from most important to least
- Give them space to work and learn independently

Don't

- Insist they do something in one specific way
- Require them to wait on other people to move forward
- Be vague about the expectations
- Ask them to work at a steady pace



I Client Types

Influencer, Motivator, Encourager, Harmonizer

If you're working with an I-type client, try using phrases like:

- Watch me as I do this...
- Let's start with the easy part...
- You can be creative with this part...
- I'm ready to walk through this when you are...



Do

- Use visual examples to show how to do something
- Ask them to complete the quickest, clearest step first
- Focus on the ways they can be creative
- Project a friendly, positive demeanor

Don't

- Expect them to take all instructions literally
- Allow them to go too long without checking-in
- Ask them to complete repetitive, routine tasks
- Be overly intense or demanding

S Client Types

Counselor, Supporter, Planner, Stabilizer

If you're working with an S-type client, try using phrases like:

- Let me know if you have any questions...
- Follow the steps and this will go smoothly...
- You can work at your own pace...
- The way other people have done it is...



S Client Types (cont.)

Do

- Maintain open communication while they're learning
- Project a calm, methodical demeanor
- Allow them to work at a steady pace
- Show them how other people do it

Don't

- Assume they will always ask for clarification
- Push them too far outside their typical routine
- Ask them to work at an intense or chaotic pace
- Ask them to improvise



C Client Types

Editor, Analyst, Skeptic, Questioner

If you're working with a C-type client, try using phrases like:

- Here's all the relevant information...
- If you need to find answers as you go, here's how...
- I'll let you figure that one out...
- From start to finish, this should take...

Do

- Share all the relevant information
- Provide a way to research their own answers as they go
- Leave some room for them to figure things out
- Tell them how long it will take to learn

Don't

- Withhold any information
- Make the goal vague
- Describe steps in an overly broad way
- Expect them to bounce between concepts



UNDERSTANDING YOUR CLIENTS' STRENGTHS AND BLIND SPOTS

TYPE	STRENGTHS	BLIND SPOTS
<p>D: Captains, Drivers, Initiators, Architects</p>	<ul style="list-style-type: none"> - Eagerly taking charge and providing clear direction. - Tending to challenge others with demanding tasks and high expectations. - Providing high-level instructions that focus on the end result. - Creating a competitive, dynamic work environment. 	<ul style="list-style-type: none"> - Working with a sense of urgency that may cause others unnecessary stress - Using a very goal-oriented approach that might ignore important details - Making changes quickly and decisively, potentially disrupting the work of others. - Being overly brief in communication
<p>I: Influencer, Motivator, Encourager, Harmonizer</p>	<ul style="list-style-type: none"> - Creating a casual, outgoing work environment. - Focusing on inspiring others with a bold vision of the future. - Being more comfortable delivering important messages verbally, with group meetings. - Giving others autonomy to find their own solutions to problems 	<ul style="list-style-type: none"> - Pursuing too many new ideas or opportunities at once. - Over-delegating the responsibility to follow through on details. - Improvising or trusting gut feelings when more planning is necessary. - Displaying impatience when providing detailed instruction.



PERSONALITY MAKES THE DIFFERENCE

TYPE	STRENGTHS	BLIND SPOTS
<p><i>S: Counselor, Supporter, Planner, Stabilizer</i></p>	<ul style="list-style-type: none"> - Typically leading by example. - Creating a peaceful, calm work environment. - Expecting team members to be stable, reliable, and cooperative. - Focusing on developing the team with one-on-one coaching and instruction. 	<ul style="list-style-type: none"> - Minimizing their feedback to others, leaving them unclear about the problem. - Delaying making decisions involving interpersonal conflict. - Not being forceful or assertive when necessary. - Having trouble adapting to sudden changes.
<p><i>C: Editor, Analyst, Skeptic, Questioner</i></p>	<ul style="list-style-type: none"> - Being more comfortable distributing important messages in writing. - Focusing on creating rules and processes for others to follow. - Expecting team members to make decisions with logic and supporting data. - Providing detailed, specific instructions to solve problems. 	<ul style="list-style-type: none"> - Doing important work independently to be sure it is done correctly, without communicating status updates. - Expecting others to be as organized and attentive to detail as they are. - Resisting people who do not use a systematic approach to organizing work. - Overcomplicating solutions to simple problems

When you're able to help clients identify and understand their own potential strengths and blind spots, you can teach them to lean into and take full advantage of their natural strengths while growing and overcoming their natural weaknesses.



PERSONALITY MAKES THE DIFFERENCE

No matter what kind of consulting you're doing, your job can be made easier by utilizing personality insights. Improving your communication skills will only benefit your business and your clients as you teach them in a more impactful, effective way. *Rather than working with each client without a guideline to understanding them, you can begin to navigate your discussions more easily so you can be successful and confident when advising them.*



Create lasting value *for your clients*

Thousands of coaches and consultants use Crystal to share easy-to-use personality insights with their clients, enhance their workshops, and improve retention.



TAKES TIME TO DECIDE

MAY BE OVERLY IDEALISTIC



TRY IT TODAY

Click to learn more

UPGRADE TO PREMIUM