



# CHAMPIONS GUIDE

Facilitation & Coaching with PrinciplesUs





**Understand yourself.**  
**Understand others.**  
**Help others understand you.**

**A New Personality Assessment**  
**Designed to Make Teams More Effective.**

## 2 | Introduction: How to Use This Guide

## 6 | The PrinciplesUs Experience

- 7 Personal and Team Discovery Workshop Outline
- 9 Pre-Work
- 9 Research and Development
- 14 Dr. Adam Grant on Self-Awareness  
and Career Success
- 15 How to Interpret and Reflect on Your Results

## 16 | Module 1: Personality Assessment Fundamentals

- 17 Getting into the “Personality Mindset”
- 17 **Exercise:** Getting in the Mindset
- 18 The PrinciplesUs Assessment Journey
- 20 Reflecting on Traits
- 21 **Exercise:** How Traits Help or Hinder You

## 22 | Module 2: Discover Your Relationships and Work Better Together

- 23 Interpersonal Relationships
- 24 **Exercise:** Explore Personalities on Your Team with Comparisons
- 28 Team Dynamics –  
Trait Scales, Archetypes, and Team Profiles
- 29 Trait Scales
- 31 **Exercise:** Explore How You Relate to One Another
- 32 **Exercise:** Unlocking Your Potential
- 33 Archetypes
- 44 Team Profiles

## 48 | Check- Out

- 49 **Exercise:** Your Personal Takeaway

## 50 | Appendix

# INTRODUCTION: HOW TO USE THIS GUIDE



PrinciplesUs is designed in a way where users can learn and gain insights about themselves, their interpersonal dynamics, and team composition with a self-directed approach. However, we have found that while people ‘intellectually’ understand the value of understanding yourself and others in this way, the experience of actually welcoming others to understand more about you –your personal preferences, strengths, and growth areas– can be challenging as it requires vulnerability. An informed facilitator can maximize learnings by carefully curating the activities and the reflection prompts that create the psychological safety necessary to begin the process of self and team discovery.

There are a couple ways to guide your team through a PrinciplesUs experience:

- 1. Self-Directed:** You can provide the necessary resources/background materials and socialize any one of the reflection exercises from this Guide for people to complete on their own time. Be sure to encourage them to share learnings even if you’re not organizing a dedicated session.
- 2. Bite-sized Team Building Activities:** Pick 1-2 of these exercises at a time and incorporate them into a weekly team meeting. Have your whole team participate and reflect together. What are the 1-2 takeaways and practical insights that you can incorporate into your team’s day to day?
- 3. Workshop:** We have found it to be most effective when teams dedicate a 60-90 minute session to go over their personality results and team profile together with the guidance of a facilitator.

This Guide will focus on the Workshop experience and will offer exercises, simple facilitation techniques, and a high-level outline of a workshop that you can follow to guide your team. Below, you will find the core modules of this facilitated PrinciplesUs experience. These modules and exercises can be used in a self-directed way or as an organized group activity:

- | Pre-work, including the completion of PrinciplesUs Assessment, review of background materials, and a personal reflection exercise.
- | Personality Assessment Fundamentals, including a facilitated review of the background materials for a robust understanding of the nuances of personality results (getting into the “personality mindset,” review of Assessment report structure, interpretation of key trait scales) and structured personal and team discovery exercises to deepen the learnings.
- | Discover Your Relationships and Work Better Together
  - | Interpersonal Relationships, including a one-on-one reflection exercise with the PrincipleUs Compare feature to reflect on results and actionable insights with your closest colleagues.
  - | Team Dynamics, including overview, facilitation tips, and exercises for your team’s exploration of the three PrinciplesUs group visualizations: Trait Scales, Archetypes, and Team Profiles.

Now let’s take your team members on a self and team discovery journey!



## ❖ PrinciplesUs Certification

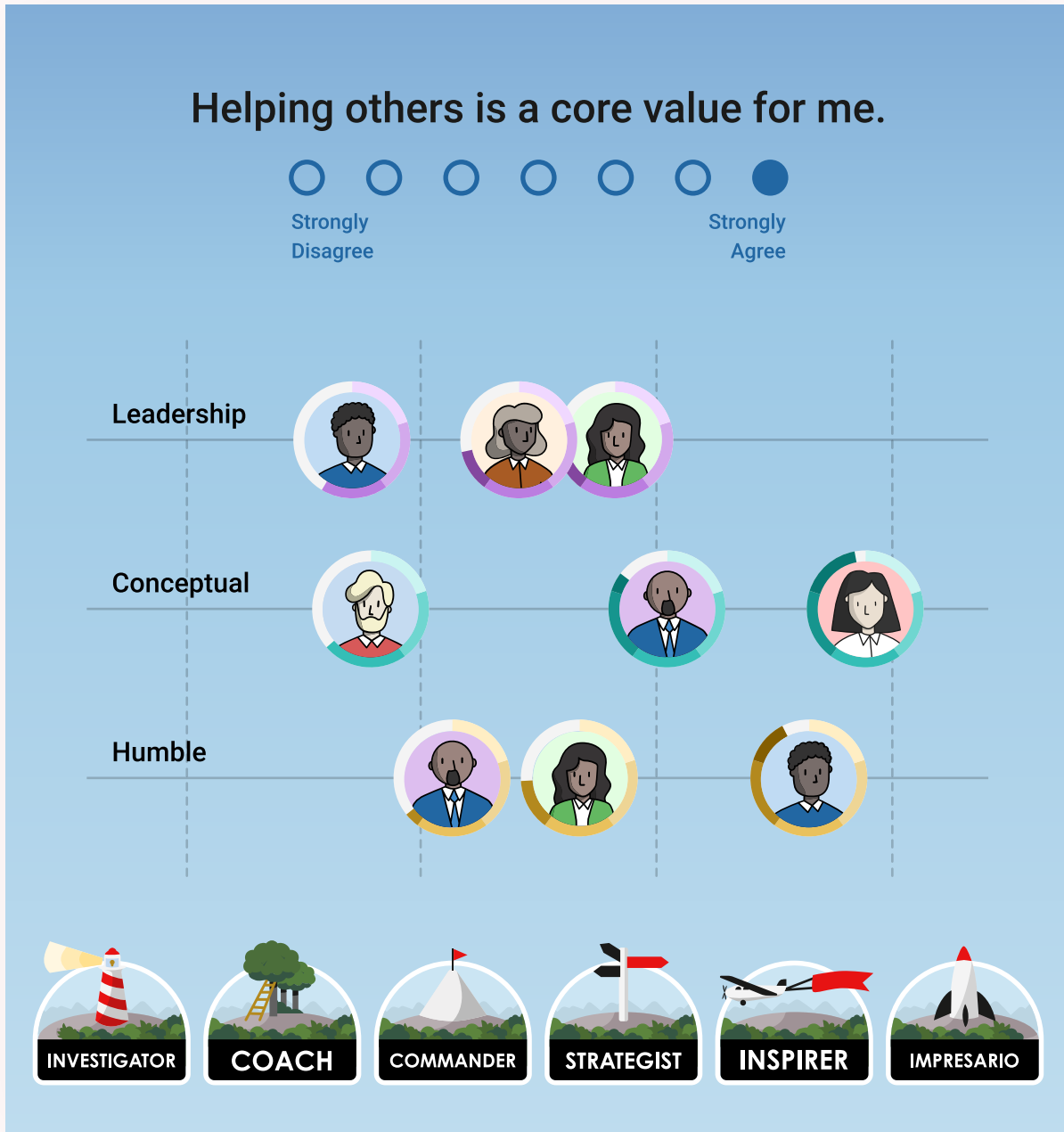
Want More Support?

We offer a Foundational Certification program for HR professionals and practitioners who are seeking a more in-depth understanding of the training and tools needed to effectively administer PrinciplesUs to teams of all sizes. Our program teaches you about the science and research behind the assessment, how to interpret assessment results, and how to help teams leverage the insights the test provides to improve relationships and maximize team potential.

To learn more, visit our website at <https://principlesus.com/get-certified>.



# THE PRINCIPLESUS EXPERIENCE





# Personal and Team Discovery Workshop Outline

The high-level outline that we propose for a 60-90 minute team-building workshop is as follows:



## | Prework

### Complete Assessment

Exercise: Personality Discovery Reflection

### Background Materials

Self-Awareness and Career Success | Dr. Adam Grant (co-creator of PrinciplesUs)

How to Interpret and Reflect on Your Results | Zack Wieder (Principles CXO)



## | Module 1: Personality Assessment Fundamentals

### Getting into the “Personality Mindset”

Exercise: Getting in the Mindset

### The PrinciplesUs Assessment Journey

Guideposts for Your Report

How to Read Your Scores

### Reflecting on Traits

Exercise: How Traits Help or Hinder You



## | Module 2: Discover Your Relationships and Work Better Together

### Interpersonal Relationships

Exercise: Explore Personalities on Your Team with Comparisons

### Team Dynamics Trait Scales, Archetypes, and Team Profiles

Trait Scales

Exercise: Explore How You Relate to One Another

Exercise: Unlocking Your Potential

Archetypes

Team Profiles



## | Check-Out

Exercise: Your Personal Takeaway

The rest of this Guide will go over this proposed outline and provide simple facilitation techniques and exercises that you can use along the way. Ultimately, your goal as a facilitator is to lead out personal and team-discovery and have people crystallize 1-3 takeaways to show up and interact most effectively. You do this by bringing awareness to people's expressed preferences and how they relate to one another, and guide them to use that knowledge to improve how the group gets things done together. In service of that goal, these modules and associated exercises can be offered in sequence in the context of an organized group activity or individually or asynchronously.

Feel free to skip around the document, skim the supporting materials, and direct your focus on any of the exercises, indicated with an \* next to them in the outline above, if you're simply looking for a couple quick things you can do with your team to get started.



## Pre-work

Before kicking off with Principles Us, you will want to communicate the reasons why you're doing a personality assessment exercise with your team, the ways in which your team will benefit from a tool like PrinciplesUs, and if/how the assessment will be used in an ongoing way at your company. In your communications, you may also want to emphasize why you're using PrinciplesUs and how it's differentiated from other assessments you may have used in the past such as Myers-Briggs, Enneagram, or DISC. Read more [about the PrinciplesUs Assessment](#) and its [Research & Development](#).

First and foremost, instruct participants to complete their PrinciplesUs Assessment. It's preferable to allow for a couple days between assessment completion and the workshop so that your team members have ample time to review their in-depth report and come prepared to the session with any questions.

Our personality experts designed a [Personal Discovery Reflection Exercise](#) to help people step back from—and look more closely at—their PrinciplesUs Assessment results. It helps people use their new perspective on personality to come up with practical, actionable insights. As part of the prework, consider requiring the completion of this exercise and/or pose reflective questions that get people to think more deeply about their results. Ask, “In your initial reading of your report, what seemed true about you? What are you curious to learn more about?”.

## Research and Development

PrinciplesUs combines best-in-class assessment frameworks, the latest personality science, and practical and proven insights from decades of business experience. To learn more about the creation of the test, [read our methodology](#).



**Ray Dalio**

Founder, Investor,  
Entrepreneur



**Dr. Adam Grant**

Organizational psychologist  
at Wharton, bestselling  
author of *Think Again*, and  
host of the TED podcast  
*WorkLife*



**Dr. Bryan Little**

Senior Fellow People  
Analytics at the Wharton  
School University of  
Pennsylvania, Distinguished  
Research Professor Emeritus  
at Carleton University



**Dr. John P. Golden**

President and Founder of  
Golden LLC, a psychological  
assessment publishing  
company with a legacy  
spanning more than 50  
years.



# Reflection Exercise

Learn even more about yourself and others  
with this simple 5-step self study.



# 1 Pick out 4-6 traits from your report that stand out to you:

Consider, among other things:



Where you scored Highest

TRAIT 1



Where you scored Lowest

TRAIT 2



Where you were most surprised/where you disagree most

TRAIT 3



Where you see the most potential for your development

TRAIT 4

# 2 For each of the traits you picked, write a 2-sentence summary of your reflection on your result.

- a. Do you agree with the result? Focus more on the general level than the specific number.
  - i. [See trait definitions](#) for more information about each scale.
- b. How does this trait serve to help or hurt you in your current role and in your growth aspirations?
  - i. List one way each trait might help you
  - ii. List one way each trait may hurt

TRAIT 1

TRAIT 2

TRAIT 3

TRAIT 4

### 3 Ask your manager and 1 person who works closely with you to reflect on the same questions.



TRAIT 1

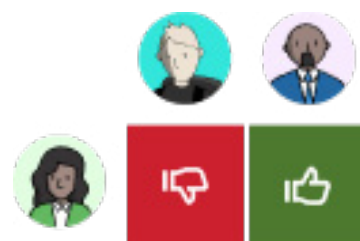
TRAIT 2

TRAIT 3

TRAIT 4

### 4 Put together your own, your manager's, and your coworker's reflections to arrive at a more complete picture of what is true about yourself in these areas of your personality.

Don't shy away from nuance, but try to state the most important points as clearly as possible. If certain areas feel unresolved or unclear, ask questions of others to understand their perspectives better.



TAKEAWAY 1

TAKEAWAY 2

## 5 Now that you have your takeaways, what do you want to do about them?

- a. In most cases, when you have a tendency that is hindering your progress, you can either work on it to get better or (more often) find others who are strong where you are weak. It usually will involve a combination of both strategies.
- b. Are there any growth areas you'd like to work on to improve?
  - i. Solicit feedback and coaching from others around you through Dot Collector. Look to others' Principles You results to see who might be strongest in these areas and ask them for their tips.
  - ii. Try to list some specific and achievable steps you might take e.g. if organization is a weakness, you might design a detailed schedule and partner with someone to hold you to deadlines.
- c. When looking for people to partner with where you are weak, use Dot Collector and Principles You to find others who have complementary strengths and weaknesses to yours.



### GROWTH AREA

### ACTION PLAN

1.

2.



### GROWTH AREA

### ACTION PLAN

1.

2.



### GROWTH AREA

### ACTION PLAN

1.

2.



### GROWTH AREA

### ACTION PLAN

1.

2.



As an additional resource, you may want to make some background materials available to the participants. The two videos that we recommend are:



### **Dr. Adam Grant on Self-Awareness and Career Success**

In this quick 5-minute video, Dr. Adam Grant, Organizational Psychologist at Wharton and Co-Creator of the PrinciplesUs Assessment, talks about getting into a helpful mindset for approaching personality assessments and how those assessments can be powerful tools for personal reflection and reflection with others.





## How to Interpret and Reflect on Your Results

In this two-part video series (16 minutes), our Chief Experience Officer, Zack Wieder, walks through the structure of the assessment and gives perspective on how to approach interpreting and reflecting on your results.

# MODULE 1: PERSONALITY ASSESSMENT FUNDAMENTALS



Note - Our Chief Experience Officer Zack Wieder's two-part video series "[How to Interpret and Reflect on Your Results](#)" covers the Personality Assessment Fundamentals section of the workshop outline. As noted earlier, we recommend sharing this video with your team in advance and then simply recapping the important points, shared below, during the workshop. If you're looking for a couple quick exercises to get your team started, refer to the Check-in Reflection (Getting into the Mindset) and Personal Discovery Exercise (How Traits Help or Hinder You) called out in this section.

## Getting into the “Personality Mindset”

An important first step to using PrinciplesUs at your company is to get your team into the “personality mindset.” One of your overarching goals when facilitating should be to create a psychologically safe environment for people to talk about what they are really like. The most effective discussions and learnings happen when people feel like they can be vulnerable. To set the stage, let your team know that personality, at its essence, is the set of tendencies you carry around with you. While traits are not destiny, they are important anchor points, and your comfort zone. It’s about finding balance within yourself and with others to do what you need to do. Most importantly, there are no right and wrong answers when it comes to assessing personality: it takes all types.

### CHECK-IN REFLECTION EXERCISE

#### Getting into the Mindset

In your initial reading of your report,

- | What seemed true about you?
- | What are you curious to learn more about?

# The PrinciplesUs Assessment Journey

## Guideposts for Your Report

The PrinciplesUs report is organized into 3 parts:



1. **Your Archetype:** This section summarizes the patterns of your results. Review your top three archetypes, as well as the archetypes you're least like.

◆ How You  
How You **Think**

◆ How You  
**Engage** with Others

◆ How You  
**Apply** Yourself

2. **Your Orientations:** This section covers your three orientations (Cognitive, Interpersonal, and Motivational), each with detailed scores across 17 traits and 41 facets.

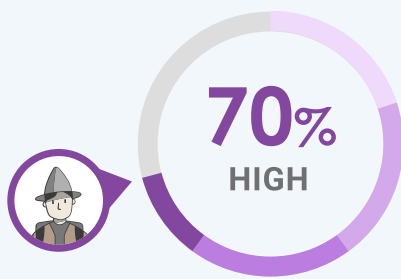


3. **You in Context:** This section provides practical insight into how your personality preferences (combination of your attributes) may play out in a variety of work and life situations.

## How to Read Your Scores

A couple things to note:

- | Each trait lies on a continuum.
- | The results follow a normal distribution, which is expected with large populations. As such, most people's results will fall in the middle. This can be adaptive at work and in life by allowing one to flex across the trait continuum.
- | Preferences are relative to population percentiles.
- | There's nothing inherently good or bad about scoring in a particular way.



Each graph places your score on scale of 0 to 100 in relation to the scores of other that have taken the assessments, this is a percentile

**There is nothing inherently “good” or “bad” about scoring a particular way.**

In the above example, you scored higher than 69% of people in that facet.

## Reflecting on Traits

The PrinciplesUs Assessment report is your main resource to get a better understanding of the 17 core Traits and 41 Facets of personality. The interactive report has detailed descriptions for each trait including the likely tendencies of those with high and low scores, together with a tailored readout of your preferences based on your specific percentile. You can also find descriptions for each of the facets in the Assessment report.

As a resource to our facilitators, our Assessment experts built [this packet of Trait Patterns \(Beta\)](#) that introduce opposing descriptors for each of the 17 Traits. Because each trait lies on a continuum, our users have found it helpful to have descriptors for both ends of the trait spectrum instead of using the language of “low” and “high” results. As an example, for our Creativity scale we use the descriptor “Creative” for those with a high preference toward creativity and “Traditional” for those with a lower preference. Similarly, with our Deliberative scale, we can begin to think of those with a high preference as “Deliberative” and those with a low preference as more “Intuitive” (though note that our scales are constructed unidirectionally; meaning, on the Creative scale we’re really only measuring one’s preference toward Creativity and the use of “Traditional” in this case is simply meant to be descriptive. As such, you won’t see these descriptors in the PrinciplesUs tool).

The opposing descriptors are especially effective when using a strengths-based approach to talking about the trait scales. This approach helps emphasize that wherever you are on the scale there are strengths and growth areas to consider. To get them in the mindset, ask your team to do some thinking around what strengths someone might have if they score “very low” on a trait. During that discussion, refer to the strengths and growth area quadrant sheets from the Trait Patterns packet as needed. Along similar lines, pay attention to using the language of high/low affinity, preference, comfort, connection, etc. versus high/low scores.

When facilitating a session, clicking down into a few traits and reviewing their trait patterns with your group brings helpful focus to people’s initial understanding and reflection on the traits. You can focus on the same 3 traits (Tough, Flexible, Extraverted) as Zack from the video linked above or choose other ones from the Trait Patterns Library that are more relevant and closely aligned to your group. After your review, we recommend that you break out the participants in your session into groups of two to three for a 10- to 15-minute self-discovery exercise that follows. Remember to adjust the exercise traits to reflect the trait patterns you choose to review with your team.



### How You Prefer to **Think**

#### **Creative**

Traditional

#### **Deliberative**

Intuitive

#### **Detailed & Reliable**

Spontaneous / Less Precise

#### **Conceptual**

Concrete

#### **Practical**

Idealistic



### How You **Engage** with Others

#### **Extraverted**

Introverted

#### **Tough**

Diplomatic / Collaborative

#### **Nurturing**

Less Nurturing / Focused on Others

#### **Leadership**

Less Directive / Accommodating

#### **Humorous**

Serious



### How You **Apply** Yourself

#### **Composed**

Reactive / Perceptive

#### **Autonomous**

Externally Directed

#### **Flexible**

Constant

#### **Determined**

Casual

#### **Humble**

Less Receptive

#### **Energetic**

Recharging

#### **Status-Seeking**

Self-Contented

## PERSONAL DISCOVERY EXERCISE

### How Traits Help or Hinder You

Look at your own report and find your results for Tough and Nurturing.

How does this trait serve to help or hinder you in your current role and your growth aspirations?

- | Share one way this trait may help you
- | Share one way this trait may hinder you

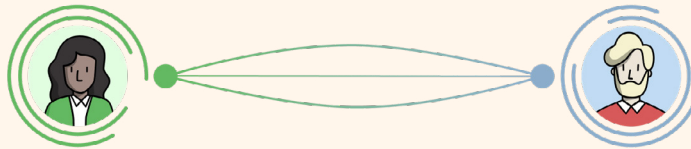
Please be ready to share one thing you reflected on with the group.

# MODULE 2: DISCOVER YOUR RELATIONSHIPS AND WORK BETTER TOGETHER





## Interpersonal Relationships



The Interpersonal Relationships module utilizes the person-to-person comparison feature of PrinciplesUs to see how personalities comprise and affect your team at work, and how you can use that knowledge to improve how you get things done together. Going through the “Team-Discovery Exercise - Explore Personalities” below, in a matter of 5 to 10 minutes you’ll end up with a short list of relevant insights about your work relationships and a toolkit for reflecting on and getting the most out of them.

You can do the exercise either in the context of your workshop or independently with one or more coworkers. In our experience, it flows nicely from the earlier Team Dynamics module and the Trait Scales team-discovery exercise, and you don’t need full team participation to get value from the exercise. If you’re facilitating this exercise as part of a workshop, we recommend that you go through one example pair with the whole group to “teach them how to fish,” meaning the group can observe and learn from your facilitation approach, the way you encourage the pair to reflect and give feedback to each other, and how you navigate the exercise to distill three to four actionable insights. Then, break them into pairs to go through the exercise on their own. Regroup at the end and take a couple of minutes to have the pairs share insights and action plans with the full group. Allow time for feedback and reactions and encourage the pairs to update their takeaways if appropriate.



Optionally, if you want to continue the exercise to allow people to pair up with different partners, have them pick someone else on the team and complete the exercise with that partner. In this round, have them incorporate thoughts and observations from other people’s presentations into their discussion. Then, have them present again, shuffle partners, and repeat the exercise one more time. Three

repetitions should be plenty for most teams and team sizes, but feel free to re-shuffle and repeat again if it’s useful!

**Note:** For a functional review of the Compare feature of PrinciplesUs, please refer to the [PrinciplesUs User Guide](#).



# Explore Personalities on Your Team with Comparisons

Learn how to work more effectively  
with your teammates.



Leadership



Conceptual



Humble



This exercise walks you through using PrinciplesUs' person-to-person comparisons feature to see how personalities make up and affect your team at work, and how you can use that knowledge to improve how you get things done together. By the end, you'll have a short list of relevant insights about your work relationships and a toolkit for reflecting on and getting the most out of them. You can do the exercise either by setting aside time for an organized group activity, or on your own independently with one or more co-workers (you don't need full team participation to get value from the exercise).



**To begin, log in to PrinciplesUs. Take the Assessment or import your PrinciplesYou results. Make sure your colleagues complete the Assessment as well.**

This will allow you to share and compare results easily.

Once everyone has taken the assessment, do the following exercise:

## **1 Pair up people on the team to compare their assessment results.**

This works best if people pick someone they work closely with or their manager.

TEAMMATES

## **2 Before comparing assessment results, take a moment to quickly note 2-3 observations about your experience working with the person you selected.**

List at least 1 area where you are similar and 1 where you differ. Feel free to use our template below! For each observation, note whether the observation generally makes it easier or harder for you to collaborate.

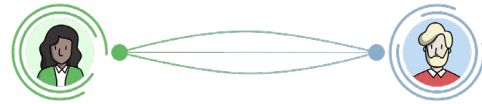
**SIMILAR**

1.
2.

**DIFFERENT**

1.
2.

**3** Use the PrinciplesUs [Compare](#) feature to compare yourself to the person you chose. (you can find this under About Others)



**4** Pick 3 specific insights from your PrinciplesUs comparison output that you want to focus on.

Choose whatever strikes you as most interesting, regardless of whether you agree or disagree. Try to pick at least 1 area where you are similar, and at least 1 area where you are different.



Most Similar

**INSIGHT 1**



Strikes you most interesting  
(regardless of whether you agree/disagree)

**INSIGHT 2**



Most Different

**INSIGHT 3**

**5** Note in each case whether your similarity or difference makes it easier or harder to collaborate, or sometimes both!

**INSIGHT 1**

Advantages

Disadvantages

**INSIGHT 2**

Advantages

Disadvantages

**INSIGHT 3**

Advantages

Disadvantages

## 6 Take a few minutes to discuss the insights with the person you compared yourself to.

As part of the conversation, consider what you wrote down in Step 2. By the end of the conversation, you should be in sync on at least 2 shared insights about your working relationship. It's ok if the conversation is nuanced; focus on being truthful rather than over-simplifying.



### TAKEAWAY 1

### TAKEAWAY 2

## 7 Finally, open the conversation to what (if anything) you can and should do to use your personality insights to improve how you work together.

For each insight you got in sync on, list at least 1 concrete step you can take to balance one another, maximize a shared strength, or compensate where you have a shared gap.



### TAKEAWAY 1 ACTION PLAN



### TAKEAWAY 2 ACTION PLAN

## Optional

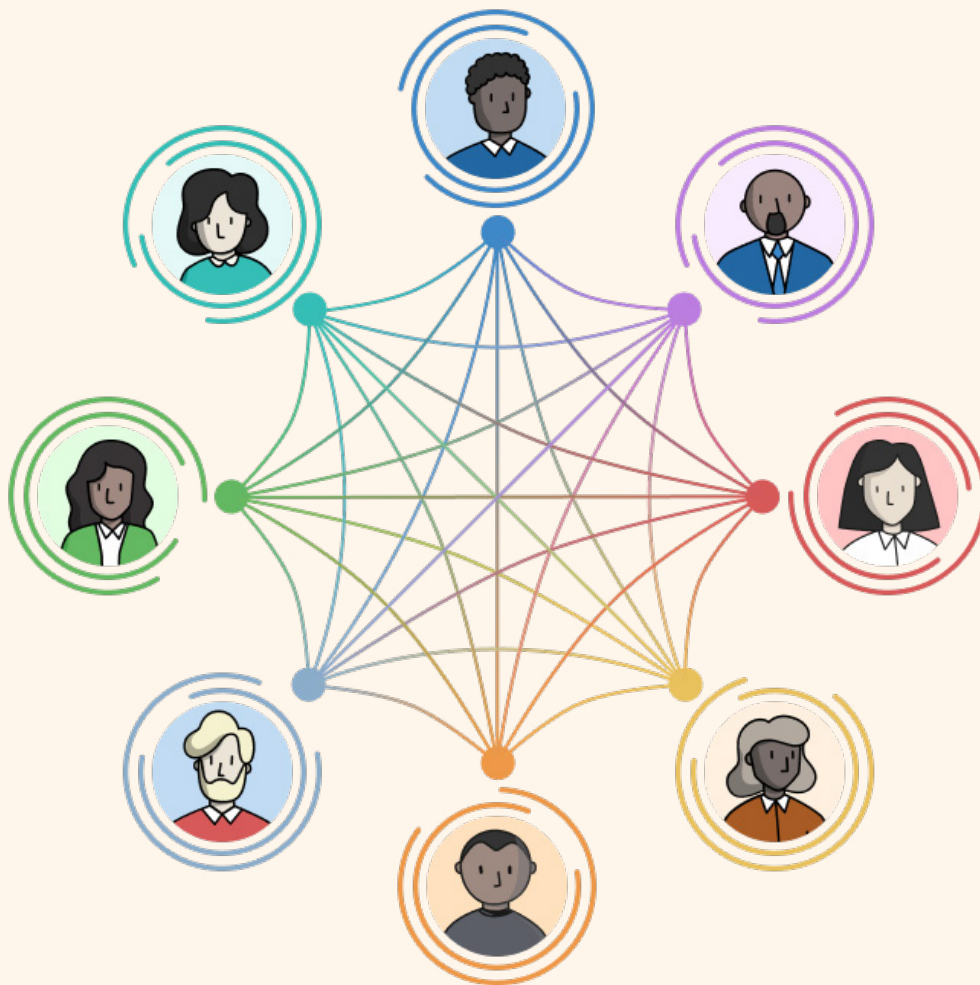
If your whole team is participating in the exercise together, this is a good opportunity to regroup. Take 3 minutes to share your insights and action plans with the entire team. Then allow 3 minutes for quick feedback and reactions. Update your takeaways if appropriate.

Pick someone else on your team and complete the same exercise with them. If your team is completing the exercise together, shuffle up the partners so that everyone is matched with someone new. This time, incorporate your thoughts and observations from people's presentations into your discussion. Then present again, shuffle partners again, and repeat the exercise one more time. 3 repetitions should be plenty for most teams and team sizes, but feel free to re-shuffle and repeat again if useful!

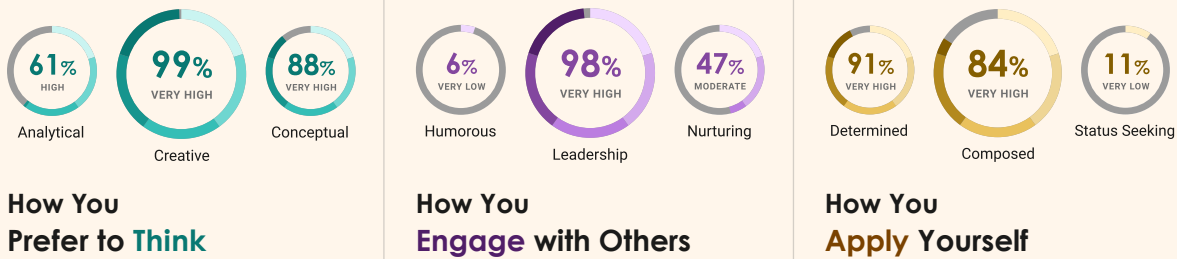
## Team Dynamics — Trait Scales, Archetypes, and Team Profiles

Using the PrinciplesUs Groups functionality, you can create dynamic visualizations for your team across Archetypes, Trait Scales, and Team Profiles.

These visualizations allow you to see how different personalities exist within and affect your team, and how you can use that knowledge to improve how you get things done together. When reviewing your team views within the context of an organized group activity, a focused process of exploration and a series of effective prompts can help you arrive at insights about your work relationships and develop a toolkit for reflecting on and getting the most out of them.



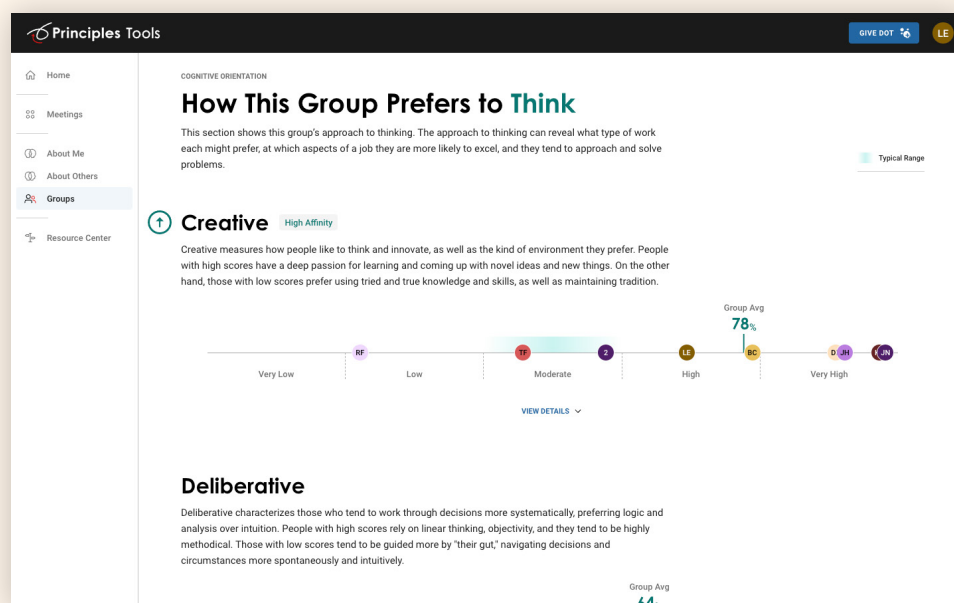
## Trait Scales



Let's start with Trait Scales.

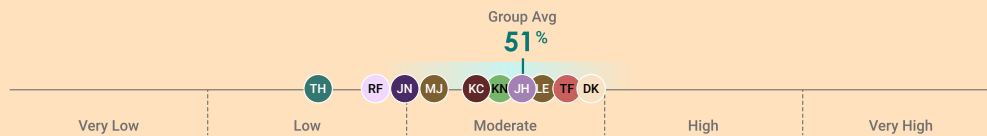
The Trait Scales visualizations allow you to see how your group is distributed across the 17 PrinciplesUs Assessment traits organized under the 3 orientations. There will likely be traits you have in common and others where you differ. Some distributions may provide balance for the group while others can present challenges. Being aware of how you relate to one another can help you interact most effectively.

When facilitating team reflections with these visualizations, you'll want to focus your team's attention on the shape of the distribution of your group (clustered, extremes and differences, balanced) and where the group average falls relative to the typical range, accounting for high and low group affinities. You may also see cases where an individual's score is marked as "Notable," meaning it diverges significantly from the group, and this is another good opportunity for reflection and facilitation to pull that individual into the conversation with their unique experience of the team. Refer to the below list for our recommended team discovery prompts:



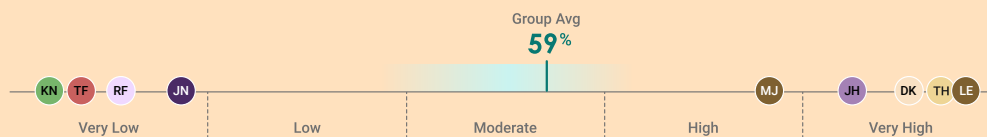
## REFLECTION

**Are you clustered, more balanced, or are some team members different or at the edges of the range?**



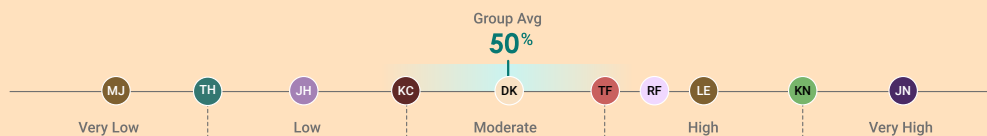
If clustered, reflect:

- | Does the team have a general tendency in one direction or another? What might that say about where you might be strong?
- | Where might it leave a gap in the team?
- | Are there individuals that are notably different from each other? What's one way you may accommodate their different styles? How can those differences benefit you in your interactions?



If different or at the edges of the range, reflect:

- | In what contexts might these differences play out? Are there tensions that might arise from those differences? Can being aware of differences help mitigate tensions?
- | What's one strategy those who are different can use to engage or communicate more effectively?



If balanced, that can be a great strength if engaged properly. Reflect:

- | What's one strategy those who are different can use to engage or communicate more effectively?
- | What are one or two strategies for leveraging different strengths? Can more moderate team members help bridge those gaps?



When reviewing the Trait Scales with your team, you may choose to focus your facilitation on a select set of traits, either because they are important or relevant to your team culture or reveal interesting clustering or extremes, or you may choose to review an orientation, such as Interpersonal, trait by trait. Optionally, have the Trait Patterns sheets handy for the traits on which you're focusing. Remember, your goal when reviewing the Trait Scales is twofold: to bring awareness to people's expressed preferences and how you relate to one another via traits you have in common or where you differ, and to crystalize one to three takeaways to help you interact most effectively. Our recommended simple exercise for an initial exploration of the Trait Scales is as follows:

### **TEAM DISCOVERY EXERCISE**

#### **Explore How You Relate to One Another**

- 1.** Pick 3 specific insights from your team's Trait Scales output that you want to focus on. Choose whatever strikes you as most interesting, regardless of whether you agree or disagree. Try to pick one area where your team is balanced, one area where your team is clustered, and one area where you see one of your team member's result marked as "Notable," meaning it diverges significantly from the group's results.
- 2.** Note in each case how the distribution of personality preferences that make up your team (group similarities, differences or extremes, clustering, and being balanced) makes it easier or harder to collaborate, or sometimes both! Facilitate an open group discussion using the targeted reflection prompts from the above list. Don't worry about covering all the prompts in your first session, just select a couple questions that will get the discussion going and focus the group's attention on what is interesting. Record at least three insights.
- 3.** Open the conversation to how the group can and should use its personality insights to improve how it works as a team. For each insight you discussed, list at least one concrete step you can take to balance one another, leverage a shared strength, or compensate where you have a shared gap. Translate these into practical next steps as "team agreements" to improve team communications and effectiveness.

Ultimately, your goal with this exercise is to bring awareness to people's expressed preferences and how you relate to one another, and to use that knowledge to improve how you get things done together. If you want to look at other traits you can repeat that process and choose from the broader list of reflection prompts. Wrap up the Trait Scales exercise with a second self-discovery breakout exercise in groups of two to three.

### **TEAM DISCOVERY EXERCISE**

## **Unlocking Your Potential**

For the next few minutes, let's reflect together!

Find yourself in the Trait Scales and share. Pick one to two traits where:

- | You feel strong and that trait is a benefit in this environment.
- | That trait is a challenge, you want feedback, or you want to grow.

Please be ready to share one thing you reflected on with the group.

## Archetypes



Now let's look at Archetypes.

The Archetype Island visualization highlights the relative concentration of archetypes on your team across the various archetype islands. Darker greens indicate the team has a relatively higher concentration of the archetypes on that island compared to lighter greens, which show a lower representation. The relative placement of the islands is important to note, as the distance on the map corresponds roughly to overall personality differences, and the trait names between the islands are a rough guide to the characteristics that define them.

The Archetype Island visualization is particularly useful for noting some overall group tendencies. It's also a helpful tool to identify individuals who have unique gifts in areas where the overall group shows a lower representation. Click on any island to see a description of that archetype group, the supporting archetypes, and any individuals with those archetypes as their top archetype. Click on the islands where the group trends "very high" and "high," and note from the descriptions how these attributes play into your group strengths. Next, click on the islands where the group trends "very low" and "low," and note from the descriptions how these attributes might be good for your group to watch out for. Note individuals whose top archetypes are in these "very low" and "low" islands and facilitate a group reflection on the ways in which these individuals can help establish balance within the group.

Discuss strategies that those who are different can use to engage or communicate more effectively. What's one way you can accommodate their different styles? How can those differences benefit the team in group collaborations?

Reflect on contexts where these differences may play out and tensions that might arise from those differences. Can being aware of differences help mitigate tensions?

## REFLECTION

### Team Archetypes

1. Note islands where the group tends "very high" and "high" and note from the descriptions how these attributes play into your group strengths.
2. Note islands where the group tends "very low" and "low" and note from the descriptions how these attributes play into your group strengths. *Note individuals whose top archetypes are in these "very low" and "low" islands and discuss the ways in which they can help establish balance within the group.*
3. Reflect on the full picture of your team. Note overall Group Tendencies and discuss:

Discuss strategies that those who are different can use to engage or communicate more effectively. What's one way you can accommodate their different styles? How can those differences benefit the team in group collaborations?

Reflect on contexts where these differences may play out and tensions that might arise from those differences. Can being aware of differences help mitigate tensions?

Principles Tools


GIVE DOT
LE

Home
Meetings
About Me
About Others
Groups
Resource Center

### Member Archetypes

	Most Like	Least Like
<b>BC</b> Brian Case	ENTERTAINER COACH IMPRESARIO	ENFORCER INDIVIDUALIST
<b>DK</b> Dominique Kole	GROWTH SEEKER ORCHESTRATOR EXPLORER	IMPLEMENTER ENFORCER
<b>JH</b> Jason Holder	THINKER GROWTH SEEKER EXPLORER	HELPER IMPLEMENTER
<b>JN</b> John Nelson	INVENTOR EXPLORER GROWTH SEEKER	TECHNICIAN IMPLEMENTER
<b>KN</b> Kendrick Nate	ORCHESTRATOR GROWTH SEEKER INSPIRER	INDIVIDUALIST CRITIC
<b>KC</b> Kathy Chold	ENTERTAINER IMPRESARIO ADVENTURER	TECHNICIAN IMPLEMENTER
<b>LE</b> Lewis Eddittings	ORCHESTRATOR STRATEGIST COACH	IMPLEMENTER INDIVIDUALIST
<b>MJ</b> Marcy Jetsons	THINKER HELPER INDIVIDUALIST	ORCHESTRATOR COMMANDER
<b>RF</b> Rachel Footwood	HELPER PROBLEM SOLVER TECHNICIAN	INVENTOR ENTERTAINER
<b>TF</b> Terry Folgers	GROWTH SEEKER COACH ORCHESTRATOR	INVESTIGATOR INDIVIDUALIST
<b>TH</b> Tommy House	ENTERTAINER ADVENTURER IMPRESARIO	INVESTIGATOR IMPLEMENTER

#### Group Reflections



People who have balanced thinking, with some differences and some similarities, can often relate well to each other. They can find that their overlapping tendencies give them a common foundation and their differences help them each in areas where they are weaker. Have you found that to be the case?

Being aware of those areas of commonality—as well as the clear areas of difference—will help you know which roles you are likely to play more or less naturally in a relationship or partnership.

## Leaders



Commanders are driven to achieve goals through determination and holding themselves and others to high standards of performance.



Shapers visualize ambitious goals, set plans in place, and push through relentlessly to make them happen.



Quiet Leaders focus on leading themselves and others through their open-mindedness and their equanimity in facing challenges - often leading as much through "taking in" as "putting out".

## Advocates



Inspirers lead through motivating people to get behind a challenging and important idea, project, or business objective.



Campaigners focus on rallying others around ideas, positions and solutions and achieving practical results.



Coaches regard self-growth, development and learning as a cornerstone of life and daily practices and they teach and model these as aspirations for others.

## Enthusiasts



Promoters tend to be distinguished by their outgoing, charismatic nature and people skills.



Impresarios love to entertain, engage socially, and facilitate great experiences with others.



Entertainers are driven by creating experiences and engaging with the world and particularly the people in it.

## Givers



Peacekeepers relish developing positive relationships between people, and seeking harmony, compromise, and cooperation.



Problem Solvers are motivated to support and help others in an industrious and professional manner.



Helpers are driven by compassion and care for others, and support of their emotional needs.

## Architects



Strategists are adept at generating and translating concepts and ideas into effective strategies to achieve results.



Planners are driven to put structure and systems around goals, translating ideas into practical and achievable plans.



Orchestrators excel at bringing people together, organizing around them, and mobilizing resources to achieve and exceed expectations.

## Creators



Adventurers are motivated by taking part in fun, exciting, and adventurous activities and pursuits.



Artisans are driven to use their creativity to bring life to beautiful and well-crafted ideas.



Inventors are driven by coming up with new and innovative ideas, products and solutions.

## Seekers



Explorers love to take in new knowledge and are drawn to new experiences through intrinsic motivations.



Growth Seekers are defined by a deep passion for learning and personal growth and development.



Thinkers are inclined to approach problems in an abstract, philosophical fashion. They naturally seek the deeper meaning of issues that arise in their daily lives.

## Fighters



Protectors care about traditions, rules and standards, and are driven by a strong sense of personal duty.



Enforcers are driven to engage with the world through reliance on standards, rules, traditions.



Critics freely express their opinions and love debating different perspectives with others.

## Producers



Technicians are driven to break down, analyze and solve problems in a methodical and practical way.



Implementers organize and structure people and processes to reliably execute tasks.



Investigators are driven to research and analyze information and data to build knowledge and understanding.

## Individualists



Individualists walk to the beat of their own drum and find unique ways of expressing themselves and their originality.

## Archetype Archipelago

Each “archetype island” contains archetypes that are related by some more fundamental traits. This is meant to help people understand not just the nuances of each type but some more fundamental attributes that connect them.

There are interesting relationships beyond each island as well. The proximity of the islands is a general representation of how closely they relate. And the trait names in the water are general indicators of what connects them.

For instance, Enthusiasts are connected to Advocates through traits around Extraversion, and to Creators on their other side through traits around Creativity and Originality. These are not precise however, they are meant to be evocative and helpful as you explore the landscape of your own and others’ personality differences.



### Leaders

Commander • Shaper • Quiet Leader

#### Key Characteristics

Leaders share traits that help them take charge, motivate others, or set demanding standards that they hold themselves and others accountable to seeing through.

#### High Affinity

Tend to take charge and have a strong preference to manage others, hold others accountable and direct teams and groups towards achievement of goals and outcomes.

#### Low Affinity

May be less naturally inclined or less interested in taking more assertive in managing others - perhaps they prefer being contributors rather than managing others, or possibly, they simply have less experience managing.



### Creators

Artisan • Inventor • Adventurer

#### Key Characteristics

Creators tend to be excited by novelty and disruptive of conventional ways of thinking and doing.

#### High Affinity

Tend to be curious, creative, interested in ideas. May be less practical and conventional in thinking.

#### Low Affinity

May tend to be more traditional, conventional, cautious and by the book.





## Enthusiasts

Entertainer • Promoter • Impresario

### Key Characteristics

Enthusiasts tend to be highly expressive and often witty and light-hearted. They eagerly engage with others to advance mutual causes.

### High Affinity

Tend to be engaging, social, oriented towards people and exciting and often new experiences with them.

### Low Affinity

Tend to be more internal, introverted, less driven to engage with people or stimulating experiences.



## Givers

Helper • Problem Solver • Peacekeeper

### Key Characteristics

Givers display genuine interest in other people. They tend to be nurturing, empathetic and caring.

### High Affinity

People who score high tend to be extremely motivated to support others, sometimes to the extent that they'll be less likely to lead or take charge in groups.

### Low Affinity

Tend to be more assertive, less oriented towards supporting others either because they are more direct and oriented towards accountability, or that they tend to be more demanding and assertive (vs compassionate/supportive) leaders in their style.



## Producers

Investigator • Implementer • Technician

### Key Characteristics

Producers tend to be "Can do" people who are practical and pragmatic in dealing with everyday issues. They may be more technical than theoretical in their approach to challenging projects.

### High Affinity

Tend to be reliable, diligent, effective in getting tasks done and thinking in a precise and methodical way.

### Low Affinity

May be less diligent, precise and perfectionistic and "by the book". Possibly because they prefer more creative and conceptual pursuits or simply more spontaneous and intuitive ways of organizing their activities and decision-making.



## Seekers

Explorer • Thinker • Growth Seeker

### Key Characteristics

Seekers tend to be deeply motivated to challenge themselves and pursue projects that promote personal growth.

### High Affinity

Tend to structure goals and tasks into plans, and work systematically to achieve them.

### Low Affinity

Tend to be less interested in personal and/or discovery and growth as a core desire. May be less inclined to seek constructive feedback on mistakes or curious to engage in new ideas and concepts.



## Fighters

Critic • Enforcer • Protector

### Key Characteristics

Fighters enjoy fighting for beliefs and ideas. They tend to be direct, feisty and blunt in communication.

### High Affinity

Tend to be dutiful, focused on rules and standards, sometimes conventional.

### Low Affinity

Tend to be less focused on rule-enforcement either because they tend to be less direct and more diplomatic, or if they have higher toughness, because they are less conventional/dutiful.



## Advocates

Inspirer • Campaigner • Coach

### Key Characteristics

Advocates motivate others to their highest potential through inspiration and example.

### High Affinity

Tend to be people-oriented, driven to motivate, build connections, support, develop and achieve goals with and through others.

### Low Affinity

Tend to be less people-oriented, less interesting in motivating and engaging and rallying others through ideas or common goals.



## Architects

Orchestrator • Strategist • Planner

### Key Characteristics

Architects engage with creating the strategic planning and oversight needed to bring people and resources together and get things done.

### High Affinity

Tend to structure goals and tasks into plans, and work systematically to achieve them.

### Low Affinity

Tend to be less inclined to bring structure and plans around initiatives and goals. Some maybe focused on creation and big picture thinking over planning (they'll likely have a strong tendency towards being "Creators", while others may be focused on detailed, tactical, and reliable execution that doesn't require them to conceptualize goals (they may find themselves strong in the Producers group).



## Individualists

### Key Characteristics

Individualists are aligned by their independent-mindedness and originality. While they are their own group, they are aligned closely with Creators who tend to be excited by novelty and disruptive of conventional ways of thinking and doing

## **PERSONAL DISCOVERY EXERCISE**

### **Island Exploration Part 1**

Your first group is with others who have the same family of top archetypes.

Your task/mission is to conduct a self-guided/small group tour of archetype islands for which you have the most affinity. You and your group members will be exploring the landscape, culture, and traits of this archetype island.

You will be interviewing each other – some sample questions (or your group can make up your own):

- | What is a typical response when someone asks, “what is your island like?”
- | What does your island look like?
- | What is its overall vibe?
- | What types of jobs or industry are common here?
- | What types of natural disasters occur here?
- | What are the national holidays or traditions?
- | What would a local consider to be the people’s greatest strengths?
- | What types of stressors challenge the locals’ the most?
- | Where do the locals go for their dream vacations?
- | What are some of the fun activities that one would find on this island?

Designate someone from your group to be the speaker when we come back together to discuss the findings of our journeys.

## PERSONAL DISCOVERY EXERCISE

### Island Exploration Part 2

We are now going to send you out exploring. You will reconvene into your original small groups. As a tour group you will be venturing out to a new territory, exploring 1-2 other archetypes.

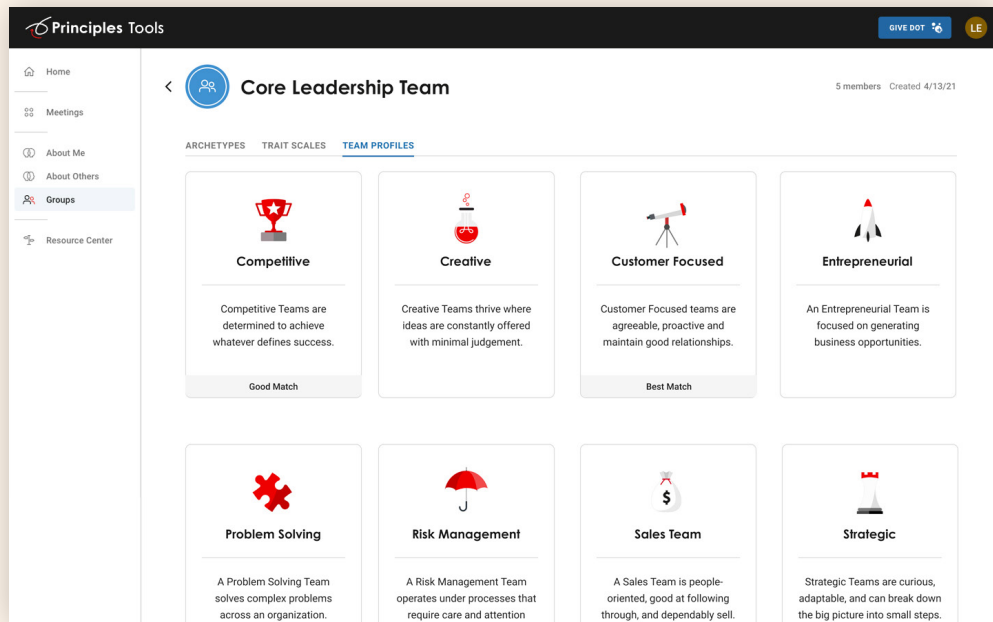
You will interview the locals/inhabitants of the new territories and see how you are similar and how you are different. The locals will also interview you.

Feel free to use the same interview questions you asked one another in your affinity groups including ones from the sample list:

- | What is a typical response when someone asks, “what is your island like?”
- | What does your island look like?
- | What is its overall vibe?
- | What types of jobs or industry are common here?
- | What types of natural disasters occur here?
- | What are the national holidays or traditions?
- | What would a local consider to be the people’s greatest strengths?
- | What types of stressors challenge the locals’ the most?
- | Where do the locals go for their dream vacations?
- | What are some of the fun activities that one would find on this island?

Designate someone from your group to be the speaker when we come back together to discuss how your island and the other islands that you explored are... Similar? Different? What do you see as strengths of the other island? What do you see as challenges of the other island? How would you establish a trading agreement or bartering system? How would you work together on a shared project (a diplomatic mission)?

## Team Profiles



Finally, let's look at Team Profiles.

Team Profiles helps you look at the composition of your team in the context of a specific area of focus. All teams adopt different areas of focus at various times, and it can be useful to be aware of how your preferences match that area of focus. In our Team Profiles, we've selected 8 common areas of focus for teams and matched them to a collection of traits that research shows can be relevant to success in those contexts. These contexts include: Competitive, Creative, Customer Focused, Entrepreneurial, Problem Solving, Risk Management, Sales, and Strategic. These are primarily meant as points of reflection that can help teams be aware of their overall tendencies, the tendencies of the individuals in the team and how they relate to the activities relevant to each of these profiles - they can help show areas that you might be in your "comfort zone" as a team or you might be required to stretch beyond your natural preferences as a team, as well as who you might draw on within the team for specific needs in those contexts.

By expanding the Profiles, you can see how your group compares to the target ranges. Each expanded view includes a definition of that Profile, its primary traits, and your group's Trait Scales for those primary traits so you can compare your group average and distribution against the target ranges (highlighted in blue).

Expanded Profiles also include write-ups for Team Challenges. Just like how an individual may need to consider strengths and growth areas/blind spots depending on where they fall on any given Trait scale, the same is true at a group level. You may find that certain members of your team can help balance the team in those areas (see example below).

Lastly, you can review Leader Characteristics - archetypes that would make for good leaders for teams with this particular Profile who will be uniquely suited to balance likely team tendencies and blind spots.

When reviewing Team Profiles with your team we recommend focusing on the following reflection opportunities:

Consider where your team falls relative to the ranges of the Primary Traits within your desired Team Profile. For instance, a high affinity for Extraversion is noted as important for a team with a Sales focus. Extraversion may be a useful trait because it means you're likely to have a lot of comfort and desire for engaging with other people. While that doesn't mean that everyone on the team has to be that way, the further your aggregate team preferences are from that direction, the more the elements of the profile that require those behaviors may be uncomfortable. Once you see that you can ask: Is that an area of strength or weakness relative to this Profile for our team?



People will be different on different traits, so ask: When we need to have this focus as a team, who might we draw upon for different aspects? As individuals, take a look at your own trait preferences and reflect on areas that are within your comfort zone versus what might be a stretch. Are there others on your team that can help balance you? For instance, if you are an Introvert you might click with lots of other traits related to a Sales focus, like Determination, but may have to get past some discomfort with a lot of social interaction. That's worth being aware of in yourself and also knowing others who might be good partners at the times where more social interaction is required. Additionally, if you look at the "team challenges" section, there are risks with highly Extraverted groups around how a strong preference for social interaction can come at the expense of listening and reflecting effectively. This is an area where more introverted members of a team may provide balance. Remember, the goal isn't for everyone to have every attribute in the same way - in fact, the diversity of the team will be a strength in accomplishing the different activities all teams need to focus on at different times. The goal is being aware of the different preferences in your team and how you can use those effectively to succeed together.

To sum up, It's much less about whether your team is good or bad overall at this thing, and instead more about:

What are some traits that might be important,

Where might they be most important? (i.e. how do they connect to the actions/activities associated to that Profile), and

What reflections does that give you in terms of how you can be most effective at times when you'll want to focus on the particular activities described in that Team Profile.

## **REFLECTION**

### **Team Profiles Guidance**

- 1.** Consider where your team falls relative to the ranges of the Primary Traits within your desired Team Profile.
- 2.** People will be different on different traits, so ask: When we need to have this focus as a team, who might we draw upon for different aspects?



Principles Tools
GIVE DOT
TH

Home
Meetings
About Me
About Others
Groups
Resource Center

WWT
ARCHETYPES
TRAIT SCALES
TEAM PROFILES

## Team Profiles

Team Profiles are a collection of Traits that are important for success in a specific context. Expand the Profiles below to show how your Group compares to the Target Ranges.

**Competitive**

↑ Tough
↑ Composed
↑ Leadership
↑ Determined

### Definition

A Competitive Team is focused on winning. Competitive Teams tend to be unrelenting in terms of achieving whatever it is that defines success. Competitive Teams can be quite aggressive in the pursuit of their goals and so caution is needed to ensure that ethical standards of behavior are not compromised. If such standards can be maintained, then Competitive Teams can be highly effective when winning is called for.

### Important Traits

Consider how your group compares with the Target Ranges on the following Traits:

#### Tough

#### Composed

#### Leadership

#### Determined

### Team Challenges

There are two key challenges for Competitive Teams. The first is that they can be so focused on winning at all costs that they become overly aggressive. The problem with too much aggression is that behavioral standards can slip, in turn introducing reputation and legal risk. The second challenge is that there are typically many tough-minded individuals who are liable to compete with each other at the expense of team objectives.

# CHECK-OUT



At the end of the workshop experience make sure to set aside time for a reflection moment so that you create space for your group to reconnect to the goals of the exercise and walk away with at least one takeaway that they can immediately apply to their day-to-day life. Reiterate your goals with the ongoing use of assessments by your team, to understand yourself, understand others, and welcome others' to understand more about you. Encourage reflections with the following prompt, and note that you can combine this reflection exercise with any of the other self- and team-discovery exercises from this document even when you're not conducting all the activities sequentially as a workshop.

### CHECK-OUT REFLECTION EXERCISE

#### Your Personal Takeaway

What one thing do you want your teammates to know about you so that you can interact most effectively?

*Note: The best teams are the ones that know each other well enough to interact with empathy, awareness, and informed skill.*

# ADDENDUM

## [About the Assessment](#) | [page 9](#)

The Assessment is a free, best-in-class personality assessment that gives rich, comprehensive insights into what someone is really like and how they interact with others.

## [Research & Development](#) | [page 9](#)

The Assessment is based in part on the Big Five personality assessment, an extensively researched and respected perspective within personality and organizational research. This framework was augmented by insights from our own personality research and Dalio's business experience.

## [Personal Discovery Reflection Exercise](#) | [page 9](#)

We designed this individual reflection exercise to help you step back from—and look closer at—your PrinciplesYou results. It's focused on helping you use your new perspective on personality to come up with practical, actionable insights. Download the PDF attached to the bottom of this page.

## [Dr. Adam Grant on Self-Awareness and Career Success](#) | [page 14](#)

In this quick 5-min video, Adam Grant (Organizational Psychologist at Wharton and Co-Creator of PrinciplesYou) talks about getting into a helpful mindset for approaching personality assessments and how they can be powerful tools for your personal reflection and reflection with others.

## [How to Interpret and Reflect on Your Results](#) | [page 16](#)

In these videos, our Chief Experience Officer Zack Wieder walks through the structure of the assessment and gives perspective on how to approach interpreting and reflecting on your results.

## [Trait Patterns](#) | [page 20](#)

As a resource to our facilitators, our Assessment experts built this packet of Trait Patterns (Beta) that introduce opposing descriptors for each of the 17 Traits. Because each trait lies on a continuum, our users have found it helpful to have descriptors for both ends of the trait spectrum instead of using the language of "low" and "high" results.

[PrinciplesUs User Guide | page 23](#)

This guide is intended to give you help in navigating and applying the tools and insights available in PrinciplesUs. It is divided into functional sections and provides an overview of what you can do. For more help and information check out our Help Center.

[Team Discovery](#)

We designed this individual reflection exercise to help you step back from--and look closer at--your PrinciplesYou results. It's focused on helping you use your new perspective on personality to come up with practical, actionable insights. Download the PDF attached to the bottom of this page.

