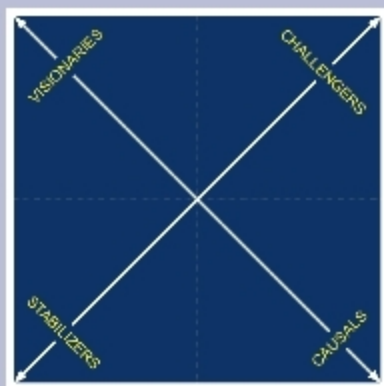


## UNDERSTANDING PERSONAL STYLES



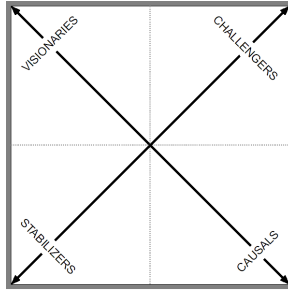
BALANCING INTER-PERSONAL SKILLS WITH PROFESSIONAL SKILLS

NIGEL A.L. BROOKS



THE BUSINESS LEADERSHIP DEVELOPMENT CORPORATION

# UNDERSTANDING PERSONAL STYLES



BALANCING INTER-PERSONAL SKILLS WITH PROFESSIONAL SKILLS

LICENSED TO TECHKNOWPARTNERS, LLC

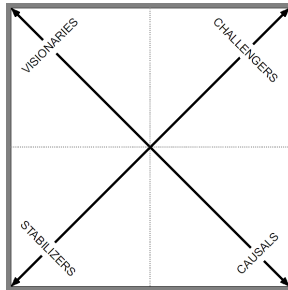
This version of the second edition is licensed by The Business Leadership Development Corporation to TechKnowPartners, LLC for its use and resale.



## **TechKnowPartners, LLC**

4659 South Lakeshore Drive, Suite K, Tempe, Arizona 85282  
V: (480) 553-8951 F: (480) 718--8673  
[www.TechKnowPartners.com](http://www.TechKnowPartners.com)

# UNDERSTANDING PERSONAL STYLES



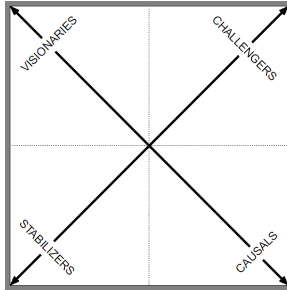
BALANCING INTER-PERSONAL SKILLS WITH PROFESSIONAL SKILLS

NIGEL A.L. BROOKS



THE BUSINESS LEADERSHIP DEVELOPMENT CORPORATION

# UNDERSTANDING PERSONAL STYLES



BALANCING INTER-PERSONAL SKILLS WITH PROFESSIONAL SKILLS

by

Nigel A.L. Brooks

Published by:



THE BUSINESS LEADERSHIP DEVELOPMENT CORPORATION  
13835 NORTH TATUM BOULEVARD 9-102  
PHOENIX, ARIZONA 85032 USA  
[www.bldsolutions.com](http://www.bldsolutions.com)  
(602) 291-4595

Second edition

© Copyright 2008-12:  
The Business Leadership Development Corporation  
Licensed to: TechKnowPartners, LLC  
All rights reserved

## TABLE OF CONTENTS

|   |      |
|---|------|
| Preface                                       | vii  |
| Foreword                                      | xiii |
| Purpose                                       | xvii |
| Introduction to Understanding Personal Styles | 1    |
| Personal Styles Model Characteristics         | 6    |
| Personal Styles Model Framework               | 10   |
| Orientation                                   | 20   |
| Dominant and Subordinate Personal Styles      | 26   |
| Individual Personal Styles Profile            | 34   |
| Recognizing the Person Styles of Others       | 36   |
| Adapting to the Styles of Others              | 38   |
| Enterprise Styles Profile                     | 43   |
| Commonly Used Instruments                     | 48   |
| Recap   | 51   |
| Next Steps                                    | 52   |
| References                                    | 53   |
| Terminology                                   | 55   |
| Appendix                                      | 65   |



## PREFACE

### *Background on BLD and the author*

“Understanding Personal Styles – Balancing Inter-Personal Skills With Professional Skills” is a component of the intellectual capital of The Business Leadership Development Corporation (BLD), which is based upon the professional experience of its president: Nigel A.L. Brooks.

The material contained herein has been developed from research and seminars that BLD has conducted over several years. The name “BLD” is derived from the word “build” for the purpose of building enterprises.

BLD is a professional services firm that assists its clients achieve performance excellence by *building sustainable advantage from vision to value™*.

BLD offers consulting, coaching and mentoring, and training to entrepreneurs, lifestyle business enterprise owners, executives, and managers, and the enterprises they serve.

Nigel A.L. Brooks is an entrepreneur, business enterprise owner, management consultant, and motivational speaker.

He obtained his experience as a partner at two major international consulting firms, as a member of the senior management team of a Fortune 100 company, as a retail and food service enterprise owner, as a wellness enterprise owner, as a radio show host, as a board member, and as a community service volunteer.

He has local-to-global experience (North and Latin America, Europe, and Asia-Pacific) from start-up entrepreneur to Fortune 100 executive.

TechKnowPartners, LLC is a technology strategy and infrastructure professional product and services provider. The firm's “sweet spot” is network telephony systems.



## *Enterpriship™*

Enterpriship™, the art and science of entrepreneurship, leadership, and management, is the process of building enterprises with *sustainable advantage*.

www.enterpriship.com

*Sustainable* means being able to continue over time, either by developing, enhancing, or maintaining the current state, or by changing it.

*Advantage* means favorable, superior, and beneficial.

The *sustainable enterprise* employs three criteria for sustainability in all decision making - are both the mindset and the intended actions responsible:

- Environmentally?
- Economically?
- Socially?

From emerging enterprises to those in their maturity, a universal problem arises from concentrating solely on products and/or services as opposed to people, processes, *and* products and/or services.

In fact, unless an enterprise focuses on its people and process capabilities *in addition* to products and/or services, it will decline and ultimately fail.

Without people there is nothing in business. Processes must be effective and efficient over time at delivering products and/or services.

The solution to building sustainable advantage lies in leveraging values-based governance disciplines that dictate successful people-oriented, process-oriented, and product and/or service capabilities.

The phrase “soft management skills” refers to those disciplines for leading people, while the phrase “hard management skills” refers to disciplines for managing processes.

The sustainable enterprise employs governance disciplines, leverages its capabilities effectively, and utilizes its capital efficiently to build advantage over time.

Entrepreneurs may lack the leadership and managerial competencies, leaders may lack entrepreneurial and managerial competencies, and managers may lack the entrepreneurial and leadership competencies to build a sustainable enterprise.

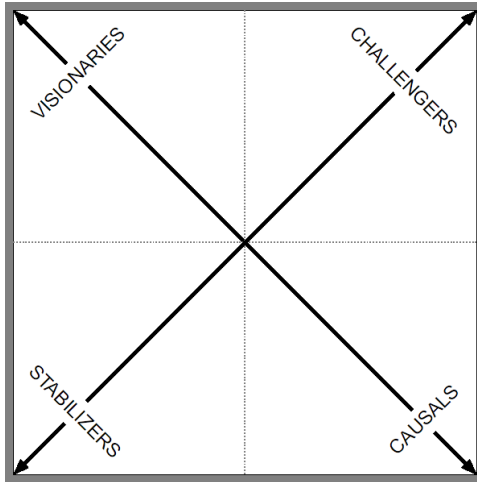
To build a sustainable enterprise requires an understanding of the traditional enterprise functions including:

- Administrative functions
  - Enterprise (multi-discipline)
  - Legal
  - Finance
  - Human Resources
  - Information Technology
  
- Operational functions
  - Research and Development
  - Operations
  - Business Development

To build a sustainable enterprise also requires an understanding of subject areas related to people including:

- Physiology – with respect to human function (for example, compliance with occupational, health, and safety rules)
- Sociology – with respect to product and/or service usage
- Politics – with respect to planning and policy development
- Philosophy – with respect to guiding principles for practical activities
- Psychology – with respect to understanding the behaviors of constituencies:
  - Primary
    - ◆ Employees
    - ◆ Customers
    - ◆ Suppliers
    - ◆ Investors
  - Secondary
    - ◆ Regulators
    - ◆ Competitors
  - Community-at-large

*Background of Understanding Personal Styles*



“Understanding Personal Styles – Balancing Inter-Personal Skills With Professional Skills” provides a framework for understanding what determines the values, attitudes, beliefs, and behaviors of people.

As a consequence, it is possible for entrepreneurs, leaders, and managers to understand the preferences of others, and adapt their Personal Styles accordingly.

By adapting their Personal Styles, entrepreneurs, leaders, and managers can become better decision makers and communicators that entertain, inform, convince, persuade, and negotiate effectively.

*Not just for business, but for social relationships too*

The ability to understand Personal Styles is just as important for enhancing social relationships as it is for professional relationships.

It is a foundation for everyday life.

### *Individuals and Enterprises*

All enterprises are made up of people, and in law, there two types of legal entities: individuals (natural people) and corporations.

The term “individual” is used to describe the Personal Styles Profile of a natural person, versus the “Enterprise Styles” Profile, which represents a group of people collectively.

## FOREWORD

A note from the author for the original ebook edition:

I am lucky to have had a very interesting and diverse career as an entrepreneur, business enterprise owner, management consultant, executive, author, and motivational speaker.

I began my entrepreneurial endeavors when I was fifteen. From my bedroom in North London, England, I organized a poetry competition, and collected poems from all over the world. I subsequently published a collection of the best as a book entitled: “Versewise – A collection of poems,” and awarded prizes.

I became fascinated with computers when the industry was called “data processing,” and spent many years building operational and analytical systems in the financial services, high-tech, manufacturing and distribution, pharmaceutical, retail and wholesale, transportation, and government industries.

By building transaction processing, management information, and decision support systems, I understood how enterprises worked. By working in the financial services industry, I understood how entire industries worked and fitted together, because every enterprise has a relationship with at least one financial institution.

Because I worked in many countries around the world, and many of the systems that I built were related to foreign exchange, import/export, and shipping and distribution, I understood how global commerce worked.

The genesis of the ideas for *Enterpriship BLDer™* and **Sustainable Advantage BLDer™** began in 1986, when I wrote a position paper that contained a model that showed how a commercial bank works.

That paper was based upon some ideas that I had formulated while developing strategic and information technology planning and development methodologies. The paper described a hypothetical bank, the banking industry at large, and relationships between a bank and both its consumer and commercial customers.

It was a first attempt at defining process and function models for enterprises.

At about the same time, I wrote a series of articles for the magazine of the Bank Administration Institute ([www.bai.org](http://www.bai.org)) (“Bank Administration” later “Banking Strategies”), as a contributing editor, that presented outlooks for the future of information technology in the global banking industry.

I wrote an article entitled “Strategic Issues for Financial Services Marketing,” which was first published in 1987 in the United States, and in 1989 in the United Kingdom, that discussed forces driving change in the banking, insurance, and securities industries, and the implications for market segmentation, product development, and delivery channels.

This article helped many financial institutions around the world apply the concepts of demographics and psychographics to their customer databases.

Writing these articles shaped my thinking about the structure of industries.

During my tenure with Andersen (now Accenture: [www.accenture.com](http://www.accenture.com)) and Booz Allen Hamilton (now Booz & Company: [www.booz.com](http://www.booz.com)), I worked with many enterprises in the development of both business and technology strategy. I understood how enterprises work and behave from the inside to the outside, and from the top-down.

Because I was an agent of change, I learned how individuals reacted to change, both favorably and unfavorably, and whether welcomed or not. I began to understand what is referred to herein as “Personal Styles.”

At American Express ([www.americanexpress.com](http://www.americanexpress.com)), I learned the importance of values and quality, first as a customer, then as a client of mine, and later as a member of senior management.

In 1995, I opened my own retail and food service enterprise to apply much of what I had learned in the corporate world to a small enterprise from the inside-out ([www.bldsolutions.com/javacentralemetrocenter](http://www.bldsolutions.com/javacentralemetrocenter)).

My career objective had been to combine my large enterprise management experience with small business enterprise ownership experience, as a basis for returning later to management consulting.

As a client, I worked with both Accenture and Booz Allen while at American Express, and American Express was a client of my food service enterprise (both individuals and the company itself).

Five years later, I sold my award-winning enterprise to return to management consulting, applying my local-to-global experience with entrepreneurs, lifestyle business enterprise owners, executives, and managers in start-ups to large corporations.

Over time, I had become familiar with many personality tests.

From 2000 to 2008, I provided “project-based” consulting through BLD. From 2008, I provide seminars through BLD’s “The Center for Business Leadership Development.”

I developed a new set of models, methodologies, and tools for strategic planning, deployment and execution, and performance measurement that is packaged as *Enterpriship BLDer™* and **Sustainable Advantage BLDer™**.

This set of intellectual capital provides a systematized approach to enterprise building, and has been used on client engagements from 2000 to the present time.

The material is integrated – meaning that it fits together in a way that is usable for any enterprise in any stage of development.

However, the material is designed to provide “just-in-time” information in an integrated (systematic) fashion for entrepreneurs, lifestyle business enterprise owners, executives, and managers as their enterprises migrate through their various stages of development.

Not only has this material been used on client engagements, but components of it have been taught in both private and public seminars.

Over time, the “Understanding Personal Styles” seminar emerged as both an offering in its own right, and as a topic on the agenda of more comprehensive seminars, although not necessarily under that name.

At BLD, I promoted this seminar because people-oriented capabilities are just as important as both product and service and process capabilities in the sustainable enterprise.

These seminars included exercises that enabled me to observe how the participants behaved and to listen to the words they used. Client engagements, including one-to-one coaching and mentoring situations, provided the same opportunities.



Over time, at BLD, I developed the material for the Personal Styles Model, including the Profile Survey.

Understanding Personal Styles is an essential discipline for building a sustainable enterprise that is environmentally, economically, and socially responsible.

It is also an essential discipline for building social relationships too.

I welcome comments at [nigelbrooks@enterpriship.com](mailto:nigelbrooks@enterpriship.com)

I have been lucky to pick-up variations of my name during my travels.

*Nigel A.L. Brooks*  
*Niguel*  
那杰  
*Na Jie*  
*Naj*

September 2008

A note from the author for this second edition:

The second edition is used in the consulting practice of TechKnowPartners, LLC, which is a venture formed between Dylan M. McKinstry and myself.

*Nigel A.L. Brooks*

June 2012

## PURPOSE

- What is this book?
  - A reference tool that introduces the subject of Personal Styles to businesspeople
  - It provides a framework for determining the values, attitudes, beliefs, and behaviors of people
- Who is the audience?
  - Entrepreneurs who start businesses – agents of change in the marketplace
  - Lifestyle business enterprise owners who are responsible for everything in their businesses
  - Executives in the top management of any business who are responsible for positioning in the marketplace
  - Managers in any business who are responsible for ensuring that quality products and/or services are delivered to external and/or internal customers – i.e., the front-line management
  - Associates (supervisors and staff) in any business who are responsible for delivering quality products and/or services to external and/or internal customers – i.e., the front-line
  - Intrapreneurs – agents of change in a business
  - Systems professionals who need to understand business concepts
  - Students and new graduates
  - Anybody aspiring to be in any of the above roles, or just curious

- Why was this book written?
  - Understanding Personal Styles is a prerequisite for building a sustainable enterprise because focusing on people-oriented capabilities is just as important as focusing on product-oriented and service-oriented capabilities
  - Balancing inter-personal skills with professional skills is necessary to entertain, inform, convince, persuade, and negotiate with others to get things done – activities which lead to economic events that drive enterprises – because nothing happens in business without people
  - Understanding Personal Styles is a useful social skill too
  - Hence, understanding Personal Styles is a foundation for everyday life
- What is the basis for the research?
  - Thorough review of the work of psychologists who have studied personality, behaviors, and communications
  - Use of seminar classrooms as laboratories for learning and testing hypotheses
  - Observations on client engagements including one-to-one coaching and mentoring sessions

**INTRODUCTION TO UNDERSTANDING PERSONAL STYLES**

*If I could...would...?*

*Try selling me a pencil* – what do you have to do?

*Try selling me a house* – what do you have to do?

*Try selling me a car* – what do you have to do?

What do you have to do? *Try discussing benefits and features, but use your inter-personal skills to adapt your Personal Style to mine.*

According to research, the likelihood of success in business is as much based upon using *inter-personal* skills effectively as it is based upon using *professional skills*.

Source: BLD research

*“If I could show you a way to strengthen your inter-personal skills, would that be of interest to you?”*

Personal characteristics are specific to each individual.

Professional characteristics are specific to each individual, and to the needs of the work place and/or community.

Individual contributors usually have less developed inter-personal skills than experienced entrepreneurs, leaders, and managers who are able to get things done through others.

This research is based upon observations that suggest that success in business is based upon the ability to entertain, inform, convince, persuade, and negotiate to get things done. These are skills required to turn events into results, and more specifically in business to monetize results.

The same skills apply to being successful in personal life.

Nothing happens in business without the activities of people – all plans, budgets, and forecasts can only be realized through the values, attitudes, beliefs, and behaviors of people.

Hence the ability to influence people is extremely important in gaining results.

Dale Carnegie wrote: “How to win friends and influence people.”

Successful entrepreneurs, leaders, and managers know the benefit of leveraging time and money, i.e., getting things done through others with other people's money.

For example, there are many successful entrepreneurs, such as Michael Dell and Bill Gates, who did not complete college, but built successful enterprises. They had a vision, passion, and the ability to get things done through others.

*What is a Personal Style?*

A Personal Style is a set of personality characteristics.

Every individual has a Personal Style Profile – specific personality characteristics that determine their preferences.

The definition of Personal Styles is based upon research of published material, and from experience on client engagements and with seminar participants.

*Objectives*

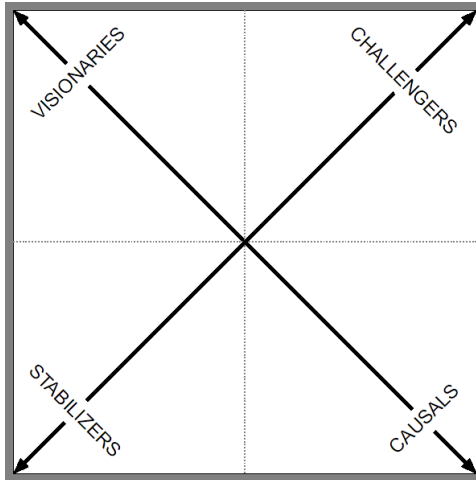
The objectives of this book are to enable the reader to:

- Understand the characteristics of Personal Styles
- Recognize an individual's<sup>1</sup> Personal Styles Profile
- Be able to adapt to the Personal Styles of others

The objectives are achieved by presenting the Personal Styles Model.

---

1 Individual person

*Personal Styles Model*

The Model is defined in terms of four groups of people:

- Challengers
- Causals
- Stabilizers
- Visionaries

The Model defines the groups and the Model Framework defines their characteristics.

*Benefits of understanding the Personal Styles Model*

Understanding the Personal Styles Model:

- Increases the likelihood of success in both social and professional relationships...
- ...which is based upon the ability to relate, to build a rapport, and to interact with others by...
- ...being able to entertain, inform, convince, persuade, and negotiate with them

“Relate” means that an individual has similar preferences to another;  
“rapport” means that an individual can build a relationship with another;  
and “interact” means that two or more individuals can do things together.

By understanding how to quickly identify certain key attributes of each Personal Style, and to recognize them in other people, an individual can quickly relate, build a rapport, and interact with others.

Hence, an individual is more likely to appear friendly and be able to influence others.

*Establishing an environment for motivation*

An individual can use their influence to establish an environment for motivating others through:

- Association – because the individual has characteristics that the other person wants or needs
- Opportunity to achieve a position or benefit
- Incentives such as compensation and/or reward and recognition
- Fear of opportunity loss or threat of negative consequences

It's up to the individual and their ability to recognize and leverage the Personal Styles of others, and then to influence accordingly.

The ability to motivate others is essential to effective entrepreneurship, leadership, and management...and for selling.



**PERSONAL STYLES MODEL CHARACTERISTICS***Historical perspective*

Definitions of four temperaments have been used throughout history by philosophers:

- Hippocrates – Greek physician, known as the father of medicine – described the four humors:
  - Cheerful
  - Enthusiastic
  - Somber
  - Calm
- Plato – classical Greek philosopher who laid the foundation for Western philosophy – developed the four characters:
  - Artistic
  - Intuitive
  - Sensible
  - Reasonable
- Aristotle – Greek philosopher who was the student of Plato – developed the four sources of happiness:
  - Sensual
  - Ethical
  - Material
  - Logical

*Modern perspective*

Modern definitions of Personal Styles trace their roots to research work by Swiss psychiatrist Carl Jung, who was the founder of analytical psychology – the psychological types.

This work has been further developed by:

- Isabel Briggs Myers and Katharine Briggs
- David Keirsey
- Nathan Brice

Jung is famous for his work on psychological types, which are models of personality.

Jung's work was enhanced by Isabel Briggs Myers and her mother Katharine Briggs who developed a personality preference inventory, which was published as the Myers-Briggs Type Indicator (MBTI).

David Keirsey combined the Myers-Briggs types with a set of four temperaments to form the Keirsey Temperament Sorter.

Nathan Brice is co-founder of Insight Learning Foundation and developed the Insight Personality System, which uses a “color-coded” approach to defining four temperaments.

*Personal and professional characteristics*

Personal characteristics of individuals include:

- Intra-personal – regarding the self
- Inter-personal – regarding relationships with others

Professional characteristics of individuals apply to the community (public life) and work-place (occupation) in terms of:

- Role
- Qualifications
- Competence
- Experience

Intra-personal characteristics include domain competencies, such as functional knowledge and technical skills.

Functional knowledge consists of subject-matter expertise; technical skills consist of mental (intellectual) and physical (physiological) expertise.

Inter-personal characteristics include oral and written communications abilities, and the extent to which an individual is a team player.

Professional characteristics of individuals include:

- Income earning – business activities
- Service providing – positions in the community and/or associations

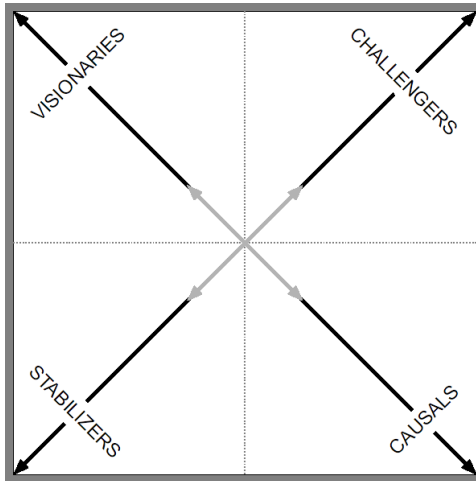
*Preferences*

Personal and professional characteristics determine the preferences of individuals in terms of values, attitudes, beliefs, and behaviors:

- Appearance and communications
- Motivation, conflict handling, and stress tolerance
- Decision making
- Learning
- Occupation
- Recreation
- Relationships

**PERSONAL STYLES MODEL FRAMEWORK**

*Personal Styles Model Framework overview*



The Personal Styles Model Framework defines four groups of people, each with common characteristics that form their primary Personal Style.

Starting clockwise from the “north east” quadrant:

- The Personal Style of *Challengers*
- The Personal Style of *Causals*
- The Personal Style of *Stabilizers*
- The Personal Style of *Visionaries*

Everybody is dominant in at least one primary Personal Style, and most people have secondary, tertiary, and quaternary styles.

However, some people are dominant in two primary, less are dominant in three primary, and even less are dominant in four primary Personal Styles.

The Personal Styles Model Framework describes the characteristics of each Personal Style in terms of:

- Key determinants
- Appreciation
- Aspiration
- Motivation
- Vocabulary

*Personal Styles Model Framework...*

**CHALLENGERS**  
***Energy and excitement; action and adventure***

*Key determinants:*

- Think in terms of the big picture
- Are optimistic
- Are concerned about their physical appearance
- Behave casually

*Appreciate action and adventure:*

- Competition
- Courage
- Energy
- Excitement
- Incentives

*Aspire to be:*

- Entrepreneurs
- Entertainers and composers
- Politicians
- Sales professionals
- Sports professionals

*Are motivated by:*

- Crises
- Opportunity
- Risk
- Freedom
- Performances

*Vocabulary (representative words):*

|            |             |             |             |
|------------|-------------|-------------|-------------|
| Action     | Bold        | Crises      | Equipment   |
| Activities | Challenges  | Cynical     | Excitement  |
| Adaptable  | Contests    | Danger      | Exercise    |
| Adventure  | Courage     | Descriptive | Experiences |
| Audacious  | Crafts      | Energy      | Fast        |
| Flexible   | Opportunity | Recreation  | Success     |
| Freedom    | Perceiving  | Risk        | Talent      |
| Impulses   | Performance | Skill       | Techniques  |
| Incentives | Playmate    | Sports      | Victory     |
| Negotiate  | Promote     | Stimulation | Wild        |



*Personal Styles Model Framework...*

**CAUSALS**  
***Peace and harmony; creativity and relationships***

*Key determinants:*

- Think in terms of more or less
- Are friendly
- Are concerned about self-identity
- Behave emotionally

*Appreciate creativity and relationships:*

- Acceptance
- Family and friends
- Fashion
- Peace, harmony, and tranquility
- Sharing

*Aspire to be:*

- Artists
- Writers (stories)
- Human resource practitioners
- Medical practitioners
- Teachers

*Are motivated by:*

- Causes and ideals
- Harmony (and avoiding conflict)
- Language
- Self-fulfillment (self-actualization<sup>2</sup>)
- “Roundtable” meetings

*Vocabulary (representative words):*

|            |               |               |            |
|------------|---------------|---------------|------------|
| Acceptance | Communication | Empathy       | Genuine    |
| Advocacy   | Compassionate | Ethics        | Growth     |
| Authentic  | Connections   | Feelings      | Harmony    |
| Benevolent | Counsel       | Friends       | Heal       |
| Causes     | Devotion      | Gentleness    | Humanities |
|            |               |               |            |
| Ideals     | Language      | Nurturing     | Sensitive  |
| Identity   | Literature    | Peace         | Sharing    |
| Integrity  | Love          | Pretend       | Sincere    |
| Intimacy   | Meaning       | Relationships | Supportive |
| Kindness   | Mystical      | Romance       | Tolerance  |

---

<sup>2</sup> Term of Abraham Maslow

*Personal Styles Model Framework...*

***STABILIZERS***  
***Safety and security; law and order***

*Key determinants:*

- Think in terms of details
- Tend to be pessimistic (the “devil's advocate”)
- Are concerned about respect
- Behave in an orderly fashion

*Appreciate law and order:*

- Authority, responsibility, rules, and structure
- Budgets
- Loyalty
- Safety and security
- Tradition

*Aspire to be:*

- Government, corporate, and educational administrators
- Professionals – accounting and law
- Military and law enforcement officials
- Leaders in institutional enterprises

*Are motivated by:*

- Duty
- Earning a role in a organization
- Being dependable
- Power
- “Board” meetings

*Vocabulary (representative words):*

|                |             |             |             |
|----------------|-------------|-------------|-------------|
| Accountability | Comparative | Dedication  | Goals       |
| Achievement    | Completion  | Dependable  | History     |
| Authority      | Compliance  | Diligent    | Honor       |
| Cautious       | Consistency | Discipline  | Inspect     |
| Chores         | Control     | Duty        | Judging     |
| Morality       | Protection  | Responsible | Structure   |
| Order          | Provider    | Rules       | Supervision |
| Organization   | Prudence    | Safety      | Traditions  |
| Policy         | Punctuality | Security    | Value       |
| Power          | Respectable | Stabilizing | Wealth      |

*Personal Styles Model Framework...*

**VISIONARIES**  
***Analysis and ideas; innovation and understanding***

*Key determinants:*

- Think in terms of true or false
- Are futurists
- Are concerned about their minds
- Behave rationally

*Appreciate innovation and understanding:*

- Research, analysis, and understanding
- Competence
- Explanations
- Functions
- Inventions

*Aspire to be:*

- Academics<sup>3</sup>
- Architects, consultants, and engineers
- Scientists
- Leaders in entrepreneurial enterprises

---

3 However, may not necessarily be comfortable in an academic institution

*Are motivated by:*

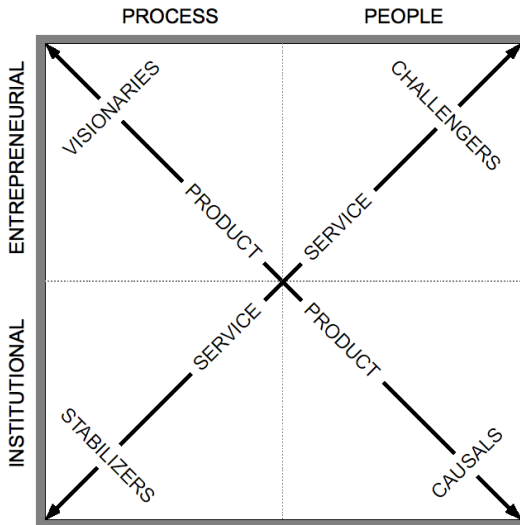
- Self development
- Problem solving
- Independence
- Conflict
- “Brainstorming” sessions

*Vocabulary (representative words):*

|            |             |            |               |
|------------|-------------|------------|---------------|
| Analysis   | Conflict    | Engineer   | Hypotheses    |
| Architect  | Curious     | Expertise  | Ideas         |
| Autonomy   | Data        | Factual    | Improvement   |
| Competence | Debates     | Future     | Information   |
| Composure  | Efficiency  | Hobbies    | Ingenious     |
| Innovation | Mysteries   | Reason     | Thinking      |
| Intellect  | Objectivity | Research   | Understanding |
| Inventive  | Pragmatic   | Solutions  | Vision        |
| Knowledge  | Proof       | Strategy   | Wisdom        |
| Logic      | Puzzles     | Technology | Wizardry      |

## ORIENTATION

*Personal Styles Model arrangement*



Source: BLD research

The Personal Styles Model is arranged according to six orientations:

- Process
- People
- Entrepreneurial
- Institutional
- Product
- Service

*Process-oriented*

The left column of the Personal Styles Model represents the Personal Styles of those individuals who are process-oriented:

- Visionaries
- Stabilizers

The left column represents the left side of the brain.

*People-oriented*

The right column of the Personal Styles Model represents the Personal Styles of those individuals who are people-oriented:

- Challengers
- Causals

The right column represents the right side of the brain.

*Entrepreneurially-oriented*

The top row of the Personal Styles Model represents the Personal Styles of those individuals who are entrepreneurially-oriented:

- Visionaries
- Challengers

The top row represents the Personal Styles of those individuals who are more comfortable with unstructured and opportunistic environments that are typically found in emerging and growth entrepreneurial enterprises such as start-ups and early stage ventures.

Those individuals with these Personal Styles are usually comfortable in the intrapreneurial environments of institutional enterprises, such as research and development activities.



*Institutionally-oriented*

The bottom row of the Personal Styles Model represents the Personal Styles of those individuals who are institutionally-oriented:

- Stabilizers
- Causals

The bottom row represents those individuals who are more comfortable with structured and supportive environments that are typically found in growth and mature institutional enterprises.

Examples of institutions include:

- Government
- Academic/educational
- Philanthropic
  - Benevolent
  - Charitable
  - Humanitarian
- Established enterprises – large corporate and financial

Note: the term “institutional” refers to both small and large established enterprises.

Individuals with these Personal Styles are uncomfortable in unstructured and emerging environments, which they perceive to be “crazy” and “out of control.”

Note: most institutional enterprises began as entrepreneurial enterprises, although in some cases, an institutional enterprise can be a spin-off from another institutional enterprise.

For example, Microsoft is institutionalized as a provider of office applications and operating system software, but began as an entrepreneurial enterprise.

The General Electric Company, one of the largest enterprises in the world, has its roots in Thomas Edison's laboratory.

Medco Health Solutions, Inc. is an institutional spin-off from Merck & Co., Inc.

It is not uncommon for institutional enterprises to acquire entrepreneurial enterprises because institutional enterprises often find it hard to innovate.

For example, IBM acquired Lotus Development Corporation in order to strengthen its position in client/server and collaborative software markets.

### *Product-oriented*

The top left/bottom right quadrants of the Personal Styles Model represent individuals with the “product-oriented” Personal Styles - this axis represents individuals who are innovative and creative with respect to products in terms of inventing them and find uses for them:

- Visionaries – innovate the products
- Causals:
  - Identify the products that people need or want to use
  - Deliver trained or healed people

The definition of products includes service-oriented products, such as those offered by financial institutions; trained people, i.e. products of the education system; and healed people, i.e. products of the health care system.

### *Service-oriented*

The bottom left/top right quadrants of the Personal Styles Model represent individuals with the “service-oriented” Personal Styles - this axis represents the individuals who provide and perform services:

- Stabilizers – the service is structuring the processes that produce and distribute products and/or services
- Challengers – the service is presenting and delivering products and/or services

The definition of services includes professional services, such as legal, finance and accounting, and government; entertainment, such as music and sports; and the delivery of services with respect to product offerings, such as installation, enhancement, and maintenance.

*Note with respect to development stages of enterprises*

Getting the right “fit” within an enterprise is extremely important for individuals in all Personal Styles to be successful.

All enterprises migrate through development stages, and there is a chasm between each one.

Development stages include *emerging, growth, mature, and decline*.

Some enterprises never reach the growth or mature stages, headed straight from emerging to decline.

Some enterprises reach the growth stage, but are unable to mature, and some mature enterprises eventually decline.

Intrapreneurial enterprises often vacillate between mature and growth.

Products and/or services migrate through essentially the same stages (although the emerging stage may be referred to as “introduction.”)

Products and/or services and enterprises become institutionalized when they become permanent features in a community or society.

“Permanence” (in the context of enterpriship) means the ability of an enterprise to generate income on an ongoing basis. It is the third stage of “establishment,” the first two stages being “founded and organized” and “stabilized” respectively.

The choice of terms “stabilizer” and “stabilized” is not coincidental.

Whereas some individuals prefer to be in enterprises that are in one development stage, others prefer to assist an enterprise cross a chasm from one development stage to another.

For example, Stabilizers are necessary to add structure to unstructured enterprises. Although they may struggle at first in the unstructured environment of an entrepreneurial enterprise, they are a necessary resource for reaching maturity.

Causals are necessary to provide the “face” of an enterprise, and to ensure that human resource policies are in place as an enterprise grows and matures.

Whereas individuals associated with the creation of a start-up may be willing to perform “heroic” acts to get a product and/or service to market and to get the enterprise established, employees who come on board later will require “fair treatment” with respect to working hours and compensation.

## **DOMINANT AND SUBORDINATE PERSONAL STYLES**

### *Primary, secondary, tertiary, and quaternary Personal Styles*

Most people are dominant in one Personal Style – their primary Personal Style:

- Challenger
- Causal
- Stabilizer
- Visionary

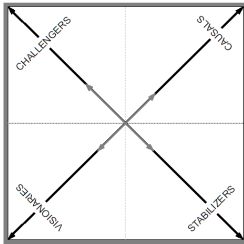
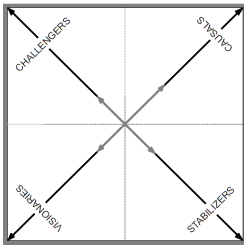
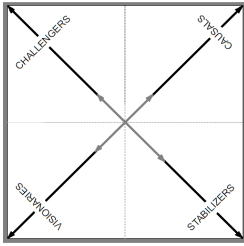
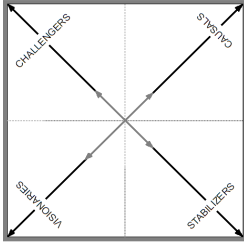
and subordinate in the other Personal Styles – their secondary, tertiary, and quaternary Personal Styles, in decreasing levels of dominance.

Consequently, every individual displays the characteristics of their subordinate Personal Styles to some extent.

For example, an individual whose primary Personal Style is Visionary and whose secondary Personal Style is Stabilizer, tends to be more judgmental than an individual whose secondary Personal Style is Challenger who tends to be more sensing.

If the individual whose primary Personal Style is Visionary has a quaternary Personal Style of Causal they will be perceived as “cold.”

An individual can “relate” to another individual that shares the same primary Personal Style – in effect they have a “bonding” because they have similar, if not identical preferences.



Most people are dominant in one Personal Style and subordinate in the others.

Two individuals that “relate” can usually communicate with each other very effectively, whereas two that don't relate may have a difficult time in communicating.

For example, Challengers want recommendations first, followed by conclusions, followed by findings; Stabilizers want findings first, followed by conclusions, followed by recommendations.

Consequently, Challengers may become impatient with Stabilizers, and Stabilizers may become frustrated by Challengers.

Visionaries ask direct questions that may generate conflict; Causals ask indirect questions that tend to avoid conflict.

Consequently, Visionaries may become frustrated with Causals for apparently “dancing around” issues; Causals may feel threatened or offended by Visionaries for their directness.

For each primary Personal Style, there are six combinations of secondary, tertiary, and quaternary Personal Styles, for a total of twenty four combinations across four primary Personal Styles.

| Primary    | Secondary  | Tertiary   | Quaternary |
|------------|------------|------------|------------|
| Challenger | Causal     | Stabilizer | Visionary  |
| Challenger | Causal     | Visionary  | Stabilizer |
| Challenger | Stabilizer | Causal     | Visionary  |
| Challenger | Stabilizer | Visionary  | Causal     |
| Challenger | Visionary  | Causal     | Stabilizer |
| Challenger | Visionary  | Stabilizer | Causal     |
| Causal     | Challenger | Stabilizer | Visionary  |
| Causal     | Challenger | Visionary  | Stabilizer |
| Causal     | Stabilizer | Challenger | Visionary  |
| Causal     | Stabilizer | Visionary  | Challenger |
| Causal     | Visionary  | Challenger | Stabilizer |
| Causal     | Visionary  | Stabilizer | Challenger |
| Stabilizer | Challenger | Causal     | Visionary  |
| Stabilizer | Challenger | Visionary  | Causal     |
| Stabilizer | Causal     | Challenger | Visionary  |
| Stabilizer | Causal     | Visionary  | Challenger |
| Stabilizer | Visionary  | Challenger | Causal     |
| Stabilizer | Visionary  | Causal     | Challenger |
| Visionary  | Challenger | Causal     | Stabilizer |
| Visionary  | Challenger | Stabilizer | Causal     |
| Visionary  | Causal     | Challenger | Stabilizer |
| Visionary  | Causal     | Stabilizer | Challenger |
| Visionary  | Stabilizer | Challenger | Causal     |
| Visionary  | Stabilizer | Causal     | Challenger |



*Dominance in more than one Personal Style*

Some people are dominant in two Personal Styles – as a consequence, they will have strong orientations:

- Challenger/Causal – strong “people-orientation”
- Challenger/Stabilizer – strong “service-orientation”
- Challenger/Visionary – strong “entrepreneurial-orientation”
- Causal/Stabilizer – strong “institutional-orientation”
- Causal/Visionary – strong “product-orientation”
- Stabilizer/Visionary – strong “process-orientation”

However Challenger/Stabilizers and Causal/Visionaries may be indecisive because of the opposite characteristics of their dominant Personal Styles.

There are eighteen combinations of two dominant Personal Styles.

| Primary    | Primary    | Tertiary   | Quaternary |
|------------|------------|------------|------------|
| Challenger | Causal     | Stabilizer | Visionary  |
| Challenger | Causal     | Visionary  | Stabilizer |
| Challenger | Stabilizer | Causal     | Visionary  |
| Challenger | Stabilizer | Visionary  | Causal     |
| Challenger | Visionary  | Causal     | Stabilizer |
| Challenger | Visionary  | Stabilizer | Causal     |
| Causal     | Stabilizer | Challenger | Visionary  |
| Causal     | Stabilizer | Visionary  | Challenger |
| Causal     | Visionary  | Challenger | Stabilizer |
| Causal     | Visionary  | Stabilizer | Challenger |
| Stabilizer | Visionary  | Challenger | Causal     |
| Stabilizer | Visionary  | Causal     | Challenger |

| Primary    | Primary    | Tertiary   | Tertiary   |
|------------|------------|------------|------------|
| Challenger | Visionary  | Causal     | Stabilizer |
| Challenger | Stabilizer | Causal     | Visionary  |
| Challenger | Causal     | Visionary  | Stabilizer |
| Causal     | Visionary  | Challenger | Stabilizer |
| Causal     | Stabilizer | Challenger | Visionary  |
| Stabilizer | Visionary  | Challenger | Causal     |

A few people are dominant in three Personal Styles with a weak quaternary Personal Style:

- Challenger/Causal/Stabilizer – weak as a Visionary
- Challenger/Causal/Visionary – weak as a Stabilizer
- Challenger/Stabilizer/Visionary – weak as a Causal
- Causal/Stabilizer/Visionary – weak as a Challenger

Those individuals that are dominant in two or three Personal Styles can “relate” to other individuals that are dominant in any of those Personal Styles.

There are four combinations of three dominant Personal Styles.

| Primary    | Primary    | Primary    | Quaternary |
|------------|------------|------------|------------|
| Challenger | Stabilizer | Visionary  | Causal     |
| Challenger | Causal     | Visionary  | Stabilizer |
| Challenger | Causal     | Stabilizer | Visionary  |
| Causal     | Stabilizer | Visionary  | Challenger |

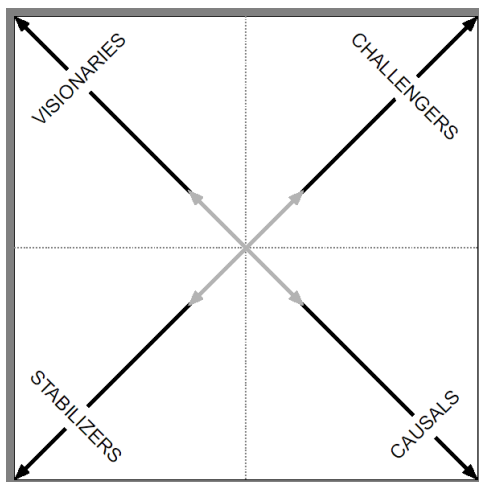
Even fewer people are dominant in all four Personal Styles:

- Challenger/Causal/Stabilizer/Visionary

An individual who is dominant in all four Personal Styles can “relate” to any other individual. This is a wonderful position to be in:

| Primary    | Primary | Primary    | Primary   |
|------------|---------|------------|-----------|
| Challenger | Causal  | Stabilizer | Visionary |

A complete list of primary, secondary, tertiary, and quaternary combinations is contained in the Appendix.

**INDIVIDUAL PERSONAL STYLES PROFILE***The Personal Styles Profile*

Each individual has their own Personal Styles Profile – their dominant and subordinate Personal Styles.

An individual's Personal Styles Profile can be determined by BLD's *Understanding Personal Styles Profile Survey*, which is available at:

[www.understandingpersonalstyles.com/book/profilesurvey](http://www.understandingpersonalstyles.com/book/profilesurvey)

Username: bookreader

Password: \*60573#

BLD's Understanding Personal Styles Profile Survey is a word selection questionnaire that has been developed from several years of experience of analyzing the vocabulary used by individuals attending its seminars.

There are other instruments in the “Jung” school that can be used to determine an individual's Personal Styles Profile, and there are many other assessments of personality characteristics in the marketplace.

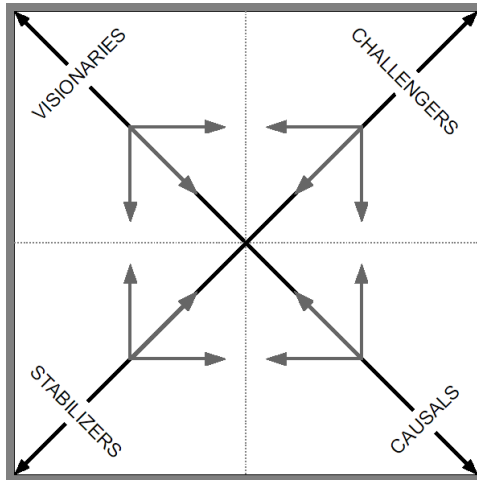
*Using the survey for understanding the self and others.*

First it is important for an individual to understand their own Personal Styles Profile so that they know how others perceive them.

Then it is important for an individual to understand how to identify the Personal Styles Profile of others with whom they must relate and interact with.

## RECOGNIZING THE PERSONAL STYLES OF OTHERS

### *Identifying the Personal Styles*



By knowing how to identify the Personal Styles Profiles of others, it is easier for an individual to adapt their Personal Style to that of other individuals that they need to relate to and interact with.

- Listen to what they say regarding their preferences...
  - Values
  - Attitudes
  - Beliefs
  - Behaviors
- ...observe what they wear...
  - Challengers – casual
  - Causals – fashionable
  - Stabilizers – formal
  - Visionaries – functional
- ...and adapt accordingly to Personal Style of the appropriate quadrant:
  - Left column/right column
  - Top row/bottom row



## ADAPTING TO THE STYLES OF OTHERS

### *Towards a tighter fit*

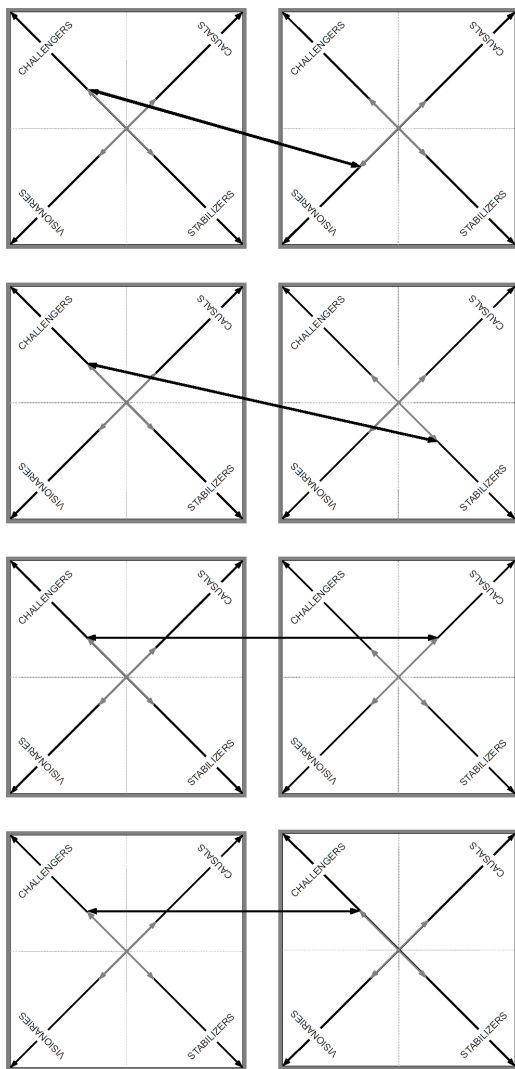
When an individual adapts their “natural” dominant Personal Style to that of another's, the relationship has a tighter fit. An individual is more likely to see the other person's point of view, and by using the same language, is more likely to be understood and accepted by the other person.

For example: A Challenger should be able to relate to other Challengers very easily, but has to adapt their natural Personal Style to those of Causals, Stabilizers, and Visionaries.

The same applies to Causals with Challengers, Stabilizers, and Visionaries; Stabilizers with Challengers, Causals, and Visionaries; and Visionaries with Challengers, Causals, and Stabilizers.

In effect, the old saying applies: “When in Rome, do as the Romans do,” according to St. Ambrose.

That means adapting to the culture of others, which is a function of shared values, attitudes, beliefs, and behaviors in a community or society.



**Adapted  
Style**

**Adapted  
Style**

**Adapted  
Style**

**Natural  
Style**

When an individual adapts their "natural" dominant Personal Style to that of another's, the relationship has a tighter fit.

*How to adapt*

An individual adapts to the Personal Style of another by emphasizing less of their own profile and more of the profile of the other individual.

This technique begins with language – the choice of words and how the words are said, and continues with values, attitudes, beliefs, and behaviors, without compromising one's own principles.

For example, when relating to individuals with a different Personal Styles Profile:

- Challengers should be less competitive, etc.
- Causals should be less idealistic, etc.
- Stabilizers should be less structured, etc.
- Visionaries should be less confrontational, etc.

Adjusting orientation is extremely important too:

- From “process-orientation” to “people-orientation” and vice versa
- From “entrepreneurial-orientation” to “institutional-orientation” and vice versa
- From “product-orientation” to “service-orientation” and vice versa

*Communication*

To increase their ability to entertain, inform, convince, persuade, and negotiate, an individual should use the vocabulary of the Personal Styles Profile of their audience – sounding like a Challenger, Causal, Stabilizer, or Visionary, they are more likely to be heard...especially when selling.

*Sell me a pencil*

Adapt the benefits and features to the preferences of the buyer, which are determined by their Personal Styles Profile:

- Challengers – keeping score
- Causals – artistic drawing and writing fiction
- Stabilizers – writing policies and rules
- Visionaries – technical drawings, and writing theses and textbooks

*Sell me a house*

Adapt the benefits and features to the preferences of the buyer, which are determined by their Personal Styles Profile:

- Challengers – great for entertaining and parties
- Causals – great for visits of family and friends
- Stabilizers – great investment
- Visionaries – great design and construction

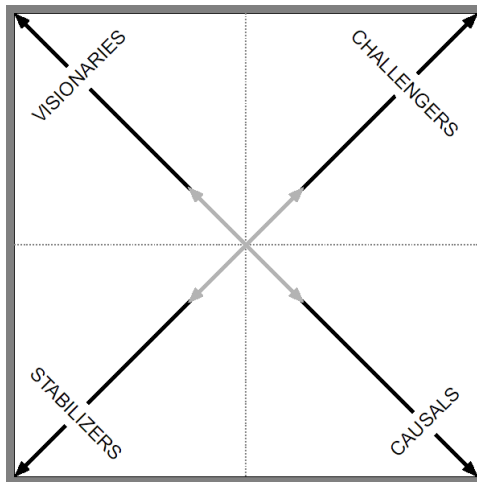
*Sell me a car*

Adapt the benefits and features to the preferences of the buyer, which are determined by their Personal Styles Profile:

- Challengers – great adventure
- Causals – great for trips with family and friends
- Stabilizers – reliable, safe, and secure
- Visionaries – compression ratio is a:b; transmission ratio is x:y

**ENTERPRISE STYLES PROFILE***Overview*

The Enterprise Styles Profile is the collective Personal Styles Profiles of all of the individuals in an enterprise.



*Roles*

The roles that individuals play the most effectively in an enterprise are determined by their Personal Styles Profiles – for example:

- Challengers:
  - Salespeople
  - Craftspeople and tradespeople
  - Technicians (such as cosmetologists and hairdressers)
- Causals:
  - Human resource professionals
  - Public relations professionals
  - Trainers
- Stabilizers:
  - Administrators
  - Accountants
  - Attorneys
- Visionaries:
  - Consultants
  - Engineers
  - Researchers

Successful leaders know how to engage individuals in certain roles and responsibilities at different stages of development of the enterprise based upon their Personal Styles Profiles.

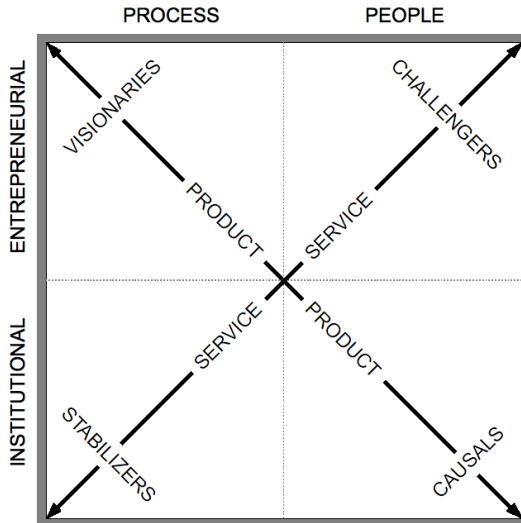
For example, Challengers usually do not perform well in the management of institutional enterprises, and Stabilizers usually do not perform well as salespeople.

There's a role for every Personal Style in every enterprise. However, be wary of those who surround themselves only with individuals of the same Personal Styles Profile.

The leadership of a sustainable enterprise balances individuals in all four Personal Styles effectively, but sometimes individuals have to adapt to a different Personal Style as job requirements dictate.



*Culture*



The Enterprise Styles Profile relates to its culture.

Enterprises with an abundance of Challengers and Visionaries have entrepreneurial cultures; enterprises with an abundance of Causals and Stabilizers have institutional cultures.

Consequently, there is a relationship between the Enterprise Styles Profile and the development stage of the enterprise.

*Country Styles Profile*

The same concept can be applied to countries.

For example, the United States is a Stabilizer/Challenger country.

On the one hand, the United States has a strong system of government and law and order – an institutional country.

On the other hand, it has a passion for competition in sports and in business – an entrepreneurial environment.

It is the blend of the two cultures that makes it a place where individuals have the freedom to innovate or self-actualize within the system.

Note: elsewhere in this material the term “Challenger/Stabilizer” has been used. A Stabilizer/Challenger has the same definition as “Challenger/Stabilizer.”

The words have been reversed to emphasize the Enterprise Style of the United States because it is the Stabilizer Profile (law and order) that enables the Challenger Profile (action and adventure) to be effective.

## COMMONLY USED INSTRUMENTS

### *Commonly used instruments from other authors*

- “Jung” school:
  - Myers-Briggs Type Indicator  
[www.myers-briggs.org](http://www.myers-briggs.org)
  - Keirsey Temperament Sorter  
[www.keirsey.com](http://www.keirsey.com)
  - Insight Personality System  
[www.insightlearning.com](http://www.insightlearning.com)
- Other instruments:
  - DiSC (Inscape Publishing) – behavioral model
    - ◆ Dominance/drive – task-orientation relating to assertiveness
      - High
        - √ Ambitious
        - √ Forceful
        - √ Pioneering
      - Low
        - √ Agreeable
        - √ Cautious
        - √ Cooperative

- ◆ Influence/inducement – people-orientation relating to communications
  - High
    - √ Enthusiastic
    - √ Optimistic
    - √ Persuasive
  - Low
    - √ Critical
    - √ Factual
    - √ Logical
- ◆ Steadiness/submission – people-orientation relating to consistency
  - High
    - √ Deliberate
    - √ Predictable
    - √ Patient
  - Low
    - √ Eager
    - √ Impatient
    - √ Restless

- ◆ Conscientiousness/compliance – task-orientation relating to structure
  - High
    - √ Careful
    - √ Diplomatic
    - √ Systematic
  - Low
    - √ Arbitrary
    - √ Independent
    - √ Opinionated

[www.discprofile.com](http://www.discprofile.com)

The Personal Styles Model addresses “why” people do things whereas DiSC addresses “what” people do.

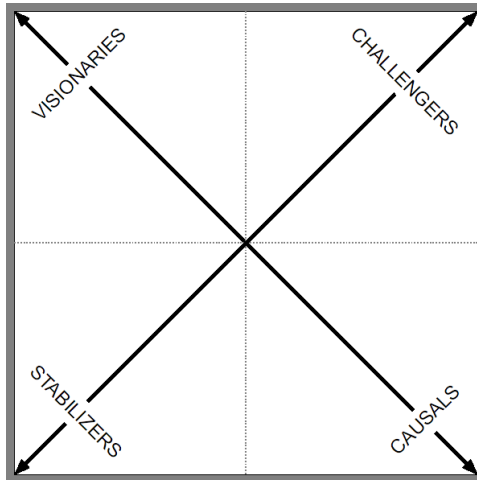
- Kolbe Indexes – conative talents

[www.kolbe.com](http://www.kolbe.com)

- Predictive Index – workplace behavior

[www.piworldwide.com](http://www.piworldwide.com)

Instruments in the “Jung” school are consistent with the Personal Styles Model. The other instruments listed here measure other personality or behavioral characteristics.

**RECAP***Summary*

Four Personal Styles:

- Challengers
- Causals
- Stabilizers
- Visionaries

Styles are apparent from an individual's appearance and their use of language.

In order to improve relationships, an individual should adapt their Personal Style to those of others without losing their own.

## NEXT STEPS

### *Call to action*

Review the Personal Styles Profile Survey, or other commonly used instruments, and share the results with others. Visit:

[www.understandingpersonalstyles.com/book/profilesurvey](http://www.understandingpersonalstyles.com/book/profilesurvey)

Username: bookreader

Password: \*60573#

### *Review reference material*

The material contained herein provides a baseline for understanding enterpriship – the art and science of entrepreneurship, leadership, and management – more information can be found at:

[www.enterpriship.com](http://www.enterpriship.com)

For further information regarding psychological types and temperaments, review the commonly used instruments material.

Abraham Maslow's Hierarchy of Needs provides a framework for the characterization of human needs.

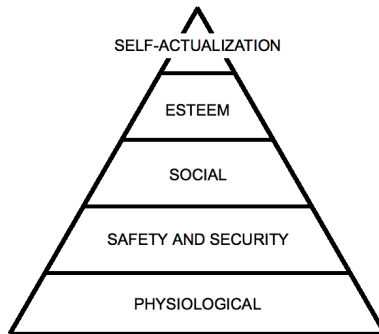
Further information about the Understanding Personal Styles materials, including live seminar, eseminar, profile survey, epresentation, and eference can be found at:

[ups.enterpriship.com](http://ups.enterpriship.com)

## REFERENCES

### *Abraham Maslow's Hierarchy of Needs*

In 1943, Abraham Maslow published a paper entitled “A Theory of Human Motivation” in which he stated that human needs are instinctive and are characterized by levels.



- Physiological – the needs for human survival
- Safety and security – the needs for protection from physical and emotional harm
- Social – the needs of being part of a community and avoiding loneliness
- Esteem – the needs for respect:
  - Internal esteem: self-respect, confidence, competence, achievement, and independence
  - External esteem: respect from others, recognition, acceptance, and reputation
- Self-actualization – the need to exist and to do whatever a person was meant to do: “problem-centered” or “reality-centered”

[www.maslow.com](http://www.maslow.com)



*The Business Leadership Development Corporation*

[www.bldsolutions.com](http://www.bldsolutions.com)

[www.bldsolutions.com/cbld](http://www.bldsolutions.com/cbld)

[www.enterpriship.com](http://www.enterpriship.com)

[www.etailia.com](http://www.etailia.com)

[www.understandingpersonalstyles.com/book](http://www.understandingpersonalstyles.com/book)

*TechKnowPartners, LLC*

[www.techknowpartners.com](http://www.techknowpartners.com)

*Isabel Briggs Myers – Gifts Differing*

<http://www.techknowpartners.com/services/store/index.html>

*Nathan Bryce – Standing Naked in the Shower*

<http://www.techknowpartners.com/services/store/index.html>

*Dale Carnegie – How to Win Friends and Influence People*

<http://www.techknowpartners.com/services/store/index.html>

*David Keirseay – Please Understand Me II*

<http://www.techknowpartners.com/services/store/index.html>

*Abraham Maslow – Toward a Psychology of Being*

<http://www.techknowpartners.com/services/store/index.html>

## TERMINOLOGY

### *Art*

An occupation that requires both knowledge and skills

### *Attitudes*

States of mind or dispositions that cause an individual to act or react in a certain way towards an event, activity, or information

### *Behaviors*

Any forms of action or reaction – usually defined by society or culture

### *Belief*

Something that is accepted as true, or placing trust or confidence in another thing

### *Capabilities*

The capacities and abilities of people, processes and functions, products and/or services to realize potential quality and value

### *Causals*

Appreciate peace and harmony; creativity and relationships

### *Challengers*

Appreciate energy and excitement; action and adventure

*Coaching*

Providing guidance on entrepreneurship, leadership, and management

*Competence*

- Knowledge (functional)
- Skills
  - Personal
    - ◆ Intra
    - ◆ Inter
  - Professional/technical

*Culture*

- Knowledge and skills learned from leaders and role models
  - Shared values, attitudes, behaviors, beliefs, and that influence further behaviors
1. “Not-for-profit” is a generic term; “non profit” means an entity that has been approved by a taxing authority as being exempt from income tax
  2. Not-for-profit does not mean not for revenue

*Feeling*

Emotional response

*Function*

A group of knowledge-related (subject area) activities that have a purpose

*Individual*

A natural person (as opposed to a corporation)

*Intuition*

Looking for meaning through insight and understanding

*Judging*

Closure

- Forming an opinion
- Evaluating a situation

*Knowledge*

Information that has been learned and retained

*Leader*

- Sets direction that others will follow with aspirational, inspirational, and motivational statements
- Providing either directive or supportive guidance styles
- Either transformational or transactional

*Leadership*

Competency (set of knowledge, skills, and activities) for aspiring, inspiring, and motivating others

*Management – competency*

Practice discipline and competency for directing and controlling events and activities

*Management – role*

Those with authority and responsibility for directing and controlling the events and activities of an enterprise

The *stewards* with the highest levels of authority and responsibility for the enterprise to the *shareholder investors/owners* – directing and controlling events and activities on their behalf – the Governance function has ultimate responsibility

- Board of directors
- Chief Executive Officer
- President

*Management – team*

- Board of Directors – elected by shareholder investors/owners
- Officers – elected by Board of Directors
  - Executives
  - Other official members of management
- Non-official managers (appointed by officers)

*Manager*

- Member of the management team
- With a well defined area of responsibility for people, processes and functions, and/or products and/or services
- In a reporting line to an executive
- Either in an official or non-official capacity

*Mentoring*

Providing guidance on subject matter; developing functional knowledge and technical skills

*Organization*

Generic term for enterprise, entity, or a component thereof

*Perceiving*

Openness

- Using senses
- Being flexible

*Permanence (in the context of enterpriship)*

Ability of the enterprise to generate income on an ongoing basis

*Personal characteristics*

Specific characteristics of each individual:

- Intra-personal (self)
- Inter-personal (relationships with others)

*Personal Style*

Set of personality characteristics

*Personality*

- External characteristics of an individual that determine values, attitudes, beliefs, and behaviors
- Derived from the Latin work “persona” meaning “mask”

*Philosophy*

To understand:

- Guiding principles for practical activities
- How to capture knowledge
- Ethics
- Aesthetics in design

*Physiology*

How living organisms function, especially with respect to human function

*Plan*

Proposed statement of direction and course of action to achieve a desired result

*Policy*

Guide to decisions and actions – what to do

*Politics*

To understand:

- Governance
- Authority and power

*Process*

A group of activities that:

- Takes in one or more kinds of input
- Creates output that is of value
  - To external constituencies
  - To internal constituencies

*Product*

- Tangible output from a process that is something of value (“hard product”) - an item that meets a customer's want or need
- Products are either component products or end products
- Products are either commodities or value-added

*Product and/or service*

Refers to either “hard” or “soft” products

Note: service delivery is assumed to be bundled with both hard and soft products



*Professional*

Individual in an occupation that requires specialized knowledge and skills, who has usually received formal training in such areas as (but not limited to):

- Accounting
- Architecture
- Engineering
- Finance
- Health care
- Human resources
- Information technology
- Law
- Marketing
- etc.

*Professional services firm*

Enterprise that provides professional services such as accounting, architecture, consulting, engineering, finance, human resources, information technology, legal, marketing, etc.

*Psychology*

Understanding human behavior

*Relationship*

An association or connection between parties

*Science*

Method for systematizing knowledge

*Sensing*

Using the senses to understand reality

*Service*

Non-tangible output from a process which can be associated with tangible items in three forms:

- Service-oriented product (“soft product”) - represented by tangible items that support the service
- Service delivery at the time of sale (or shortly thereafter)
- Supporting service after a sale

*Service-oriented product*

A non-tangible product represented by tangible items such as, but not limited to: accounts, agreements, brochures, contracts, policies, procedures, relationships, statements, and transactions

*Skill*

Method obtained by experience and/or training

*Social*

Community living

*Society*

- Segment of a community or a group of communities
- Membership group organized for some purpose, including as an enterprise

*Sociology*

Understanding human social behavior

*Stabilizers*

Appreciate safety and security; law and order

*Thinker*

Analyzes data innovatively and rationally

*Upwardly mobile enterprise*

- A small to large enterprise focused on large market dominance (large share either industry-wide or in niches) with local-to-global aspiration in traditional or non-traditional industries
- With growth potential from highly innovative people, processes, and products and/or services, and/or duplication of a business system
- Financed by third-party investors (closely or widely held) seeking capital appreciation, and potentially cash flow from dividends and/or interest
- With medium to high risk

*Value*

Something of worth or usefulness

*Values*

System of beliefs that:

- Sets expectations for behavior
- Establishes positions and priorities
- Provides a framework for decision making

*Visionaries*

Appreciate analysis and ideas; innovation and understanding

## APPENDIX

### *Tables of primary, secondary, tertiary, and quaternary combinations*

- Primary, secondary, tertiary, quaternary
- Primary, primary, tertiary, quaternary
- Primary, primary, tertiary, tertiary
- Primary, primary, primary, quaternary
- Primary, primary, primary, primary
- Primary, secondary, secondary, secondary
- Primary, secondary, secondary, quaternary
- Primary, secondary, tertiary, tertiary

| Primary    | Secondary  | Tertiary   | Quaternary |
|------------|------------|------------|------------|
| Challenger | Causal     | Stabilizer | Visionary  |
| Challenger | Causal     | Visionary  | Stabilizer |
| Challenger | Stabilizer | Causal     | Visionary  |
| Challenger | Stabilizer | Visionary  | Causal     |
| Challenger | Visionary  | Causal     | Stabilizer |
| Challenger | Visionary  | Stabilizer | Causal     |
| Causal     | Challenger | Stabilizer | Visionary  |
| Causal     | Challenger | Visionary  | Stabilizer |
| Causal     | Stabilizer | Challenger | Visionary  |
| Causal     | Stabilizer | Visionary  | Challenger |
| Causal     | Visionary  | Challenger | Stabilizer |
| Causal     | Visionary  | Stabilizer | Challenger |
| Stabilizer | Challenger | Causal     | Visionary  |
| Stabilizer | Challenger | Visionary  | Causal     |
| Stabilizer | Causal     | Challenger | Visionary  |
| Stabilizer | Causal     | Visionary  | Challenger |
| Stabilizer | Visionary  | Challenger | Causal     |
| Stabilizer | Visionary  | Causal     | Challenger |
| Visionary  | Challenger | Causal     | Stabilizer |
| Visionary  | Challenger | Stabilizer | Causal     |
| Visionary  | Causal     | Challenger | Stabilizer |
| Visionary  | Causal     | Stabilizer | Challenger |
| Visionary  | Stabilizer | Challenger | Causal     |
| Visionary  | Stabilizer | Causal     | Challenger |

| Primary    | Primary    | Tertiary   | Quaternary |
|------------|------------|------------|------------|
| Challenger | Causal     | Stabilizer | Visionary  |
| Challenger | Causal     | Visionary  | Stabilizer |
| Challenger | Stabilizer | Causal     | Visionary  |
| Challenger | Stabilizer | Visionary  | Causal     |
| Challenger | Visionary  | Causal     | Stabilizer |
| Challenger | Visionary  | Stabilizer | Causal     |
| Causal     | Stabilizer | Challenger | Visionary  |
| Causal     | Stabilizer | Visionary  | Challenger |
| Causal     | Visionary  | Challenger | Stabilizer |
| Causal     | Visionary  | Stabilizer | Challenger |
| Stabilizer | Visionary  | Challenger | Causal     |
| Stabilizer | Visionary  | Causal     | Challenger |

| Primary    | Primary    | Tertiary   | Tertiary   |
|------------|------------|------------|------------|
| Challenger | Visionary  | Causal     | Stabilizer |
| Challenger | Stabilizer | Causal     | Visionary  |
| Challenger | Causal     | Visionary  | Stabilizer |
| Causal     | Visionary  | Challenger | Stabilizer |
| Causal     | Stabilizer | Challenger | Visionary  |
| Stabilizer | Visionary  | Challenger | Causal     |

| Primary    | Primary    | Primary    | Quaternary |
|------------|------------|------------|------------|
| Challenger | Stabilizer | Visionary  | Causal     |
| Challenger | Causal     | Visionary  | Stabilizer |
| Challenger | Causal     | Stabilizer | Visionary  |
| Causal     | Stabilizer | Visionary  | Challenger |

| Primary    | Primary | Primary    | Primary   |
|------------|---------|------------|-----------|
| Challenger | Causal  | Stabilizer | Visionary |

| Primary    | Secondary  | Secondary  | Secondary  |
|------------|------------|------------|------------|
| Challenger | Causal     | Stabilizer | Visionary  |
| Causal     | Challenger | Stabilizer | Visionary  |
| Stabilizer | Challenger | Causal     | Visionary  |
| Visionary  | Challenger | Causal     | Stabilizer |

| Primary    | Secondary  | Secondary  | Quaternary |
|------------|------------|------------|------------|
| Challenger | Causal     | Stabilizer | Visionary  |
| Challenger | Causal     | Visionary  | Stabilizer |
| Challenger | Stabilizer | Visionary  | Causal     |
| Causal     | Stabilizer | Visionary  | Challenger |
| Causal     | Stabilizer | Challenger | Visionary  |
| Causal     | Visionary  | Challenger | Stabilizer |
| Stabilizer | Visionary  | Challenger | Causal     |
| Stabilizer | Challenger | Causal     | Visionary  |
| Stabilizer | Causal     | Visionary  | Challenger |
| Visionary  | Challenger | Causal     | Stabilizer |
| Visionary  | Causal     | Stabilizer | Challenger |
| Visionary  | Challenger | Stabilizer | Causal     |



| Primary    | Secondary  | Tertiary   | Tertiary   |
|------------|------------|------------|------------|
| Challenger | Causal     | Stabilizer | Visionary  |
| Challenger | Stabilizer | Causal     | Visionary  |
| Challenger | Visionary  | Causal     | Stabilizer |
| Causal     | Challenger | Stabilizer | Visionary  |
| Causal     | Stabilizer | Challenger | Visionary  |
| Causal     | Visionary  | Challenger | Stabilizer |
| Stabilizer | Challenger | Causal     | Visionary  |
| Stabilizer | Causal     | Challenger | Visionary  |
| Stabilizer | Visionary  | Challenger | Causal     |
| Visionary  | Challenger | Causal     | Stabilizer |
| Visionary  | Causal     | Challenger | Stabilizer |
| Visionary  | Stabilizer | Challenger | Causal     |



According to research, the likelihood of success in business is as much based upon using *inter-personal* skills effectively as it is based upon using *professional* skills...

Source: BLD research

*...If I could show you a way to strengthen your inter-personal skills, would that be of interest to you...?*

Nigel A.L. Brooks

President, The Business Leadership Development Corporation