

T.E.A.M. Dynamics

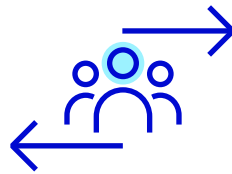
Using personality dynamics to help attract and retain clients

Overview

Personalities can undermine one's sales efforts unless one knows how to turn personality conflicts into personality connections. "T.E.A.M. Dynamics" is designed to help financial professionals understand their own—and others—core personality types. It includes a keynote speech and four workshops. In the keynote, the goal is for attendees to learn their personality types, how clients and prospects perceive them, and how to bridge the gap between their personalities and those of their clients. The first workshop focuses on recognizing personality types through verbal and non-verbal cues. The second workshop focuses on critical sales modifications for each personality. The third workshop focuses on successfully motivating and managing conflict with each personality.

Program toolbox: from principles to practice

- **Keynote presentation¹:**
70 minutes, optimal audience: 30 or more
- **Workbook² and Recap³:**
the personality profile and overview brochures
- **Client conversation profile⁴:**
a checklist of key words and attributes designed to help financial professionals profile clients without using the T.E.A.M. test
- **Workshop I (Recognizing Personality DNA):** recognizing clients' and prospects' core personality types. 40 minutes, optimal audience: 30 or more
- **Workshop II (Relationship-building with Personality DNA):** customizing sales approaches based on personality types. 40 minutes, optimal audience: 30 or more
- **Workshop III (Managing Personality DNA):** personality DNA in management situations. 40 minutes, optimal audience: 30 or more



Skills to be developed from the presentation

Forge strong, mutually beneficial relationships with others by connecting with the core personalities that drive their actions.

Attendees are shown:

- Four core personality types
- How others may perceive them
- Ways to improve relationships and customize sales approaches based on the core personality types

Research highlights⁵

- The majority of people's personality styles fall into the "Togetherness Person" and "Motivator" categories
- "Enterpriser" and "Analyzer" personalities are less common in the general population
- Most people easily connect with personality styles similar to their own and are most likely to clash with those who are different

Contributor

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¹VKC-TEAM-PPT-11

²VKC-TEAM-BRO-6-E

³VKC-TEAM-BRO-1-E

⁴VKC-TEAM-FLY-2

⁵Source: Advisor Insights Inc., 6/30/20. Used with permission.

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¹Source: Cerulli Associates. Used with permission.

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