



# Understanding personalities for better communication

Teresa Slack, ACS, FLMI,CPB



A photograph of two young women with long blonde hair, seen from the chest up, engaged in a conversation outdoors at night. The woman on the left is in profile, looking towards the right, and is wearing a dark jacket with a light-colored fur-lined hood. The woman on the right is facing her, also in profile, and is wearing a light-colored top. The background is dark and out of focus, showing some green foliage and a hint of a city light. The text "Take a minute to connect with your neighbour" is overlaid in white on the right side of the image.

Take a minute  
to connect with  
your neighbour

#QBConnect | WiFi: QBConnect

# CPD Process

In order to receive CPD credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
- CPD certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

# Today's speaker



Teresa Slack, ACS, FLMI, CPB  
CEO

Financly Bookkeeping Solutions  
@Financly @SlackTeresa

# Agenda

What is Personality Profiling

Learn what our go to personality style is

Intro to Personality Profiles

Understanding the 4 personality styles

How to work with each style

Q & A



**An optimist sees an opportunity in every calamity, a pessimist sees a calamity in every opportunity.**

Winston Churchill



# What is personality profiling?

- Why don't I connect with this client?
- Why does he/she drive me nuts?
- Get to the point and skip the small talk!
- Let's have a chat!



Welcome to understanding personalities for better communication!

# Cornerstone principals

- All styles are equally valuable and necessary
- Your style is influenced by other factors
- Understand yourself first
- Learn about other peoples styles
- You can improve the quality of your relationships



There are no hard and fast rules, we are all a mix of styles that are influenced by our experiences



# Let's learn our preferred style



Complete the basic personality assessment.

# Complete your DISC Personality assessment



## UNDERSTANDING YOURSELF (DISC)

Circle only one word in each row that you feel describes you best right now. Then transfer your answers over to the Scoring Sheet. Total up each column. Your highest score is your predominate personality type.

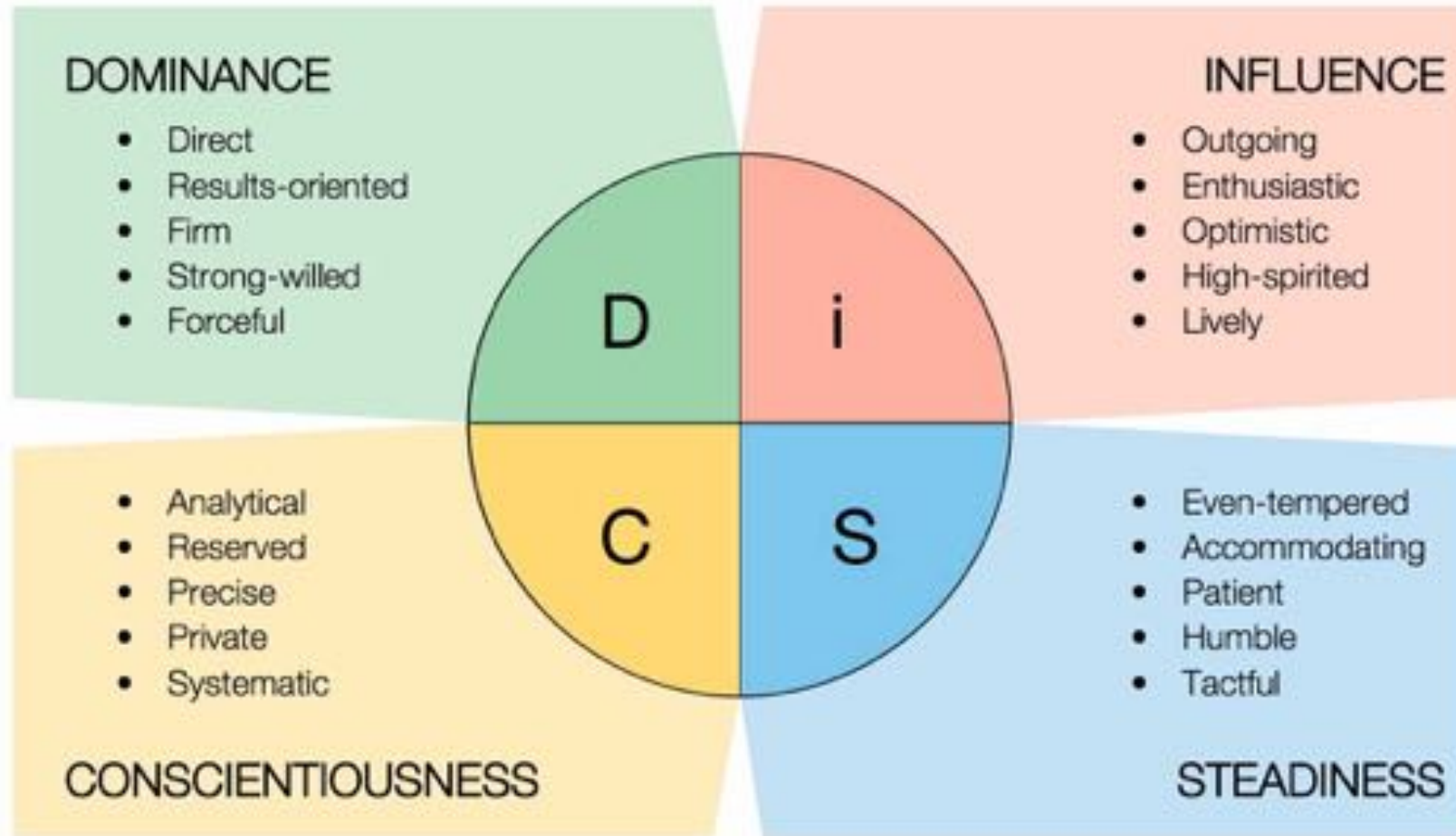
#	A	B	C	D
1.	Restrained	Forceful	Careful	Expressive
2.	Pioneering	Correct	Exciting	Satisfied
3.	Willing	Animated	Bold	Precise
4.	Argumentative	Doubting	Indecisive	Unpredictable
5.	Respectful	Out-going	Patient	Daring
6.	Persuasive	Self-reliant	Logical	Gentle
7.	Cautious	Even-tempered	Decisive	Life-of-the-party
8.	Popular	Assertive	Perfectionist	Generous
9.	Colorful	Modest	Easy-going	Unyielding
10.	Systematic	Optimistic	Persistent	Accommodating
11.	Relentless	Humble	Neighorly	Talkative
12.	Friendly	Observant	Playful	Strong-willed
13.	Charming	Adventurous	Disciplined	Deliberate
14.	Restrained	Steady	Aggressive	Attractive
15.	Enthusiastic	Analytical	Sympathetic	Determined
16.	Commanding	Impulsive	Slow-paced	Critical
17.	Consistent	Force-of-character	Lively	Laid-back
18.	Influential	Kind	Independent	Orderly
19.	Idealistic	Popular	Pleasant	Out-spoken
20.	Impatient	Serious	Procrastinator	Emotional
21.	Competitive	Spontaneous	Loyal	Thoughtful
22.	Self-sacrificing	Considerate	Convincing	Courageous
23.	Dependent	Flighty	Stoic	Pushy
24.	Tolerant	Conventional	Stimulating	Directing

# How to score your DISC assessment

## D-I-S-C SCORING SHEET

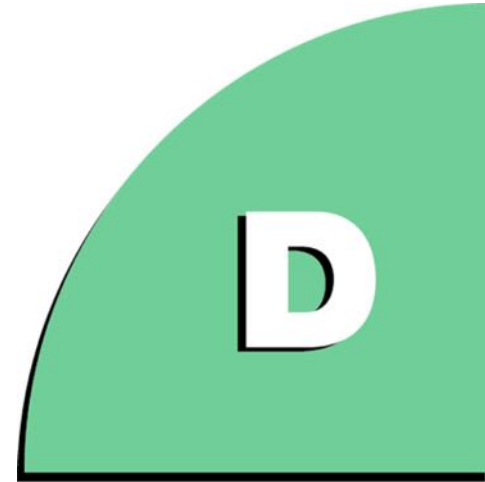
DISC PROFILE	D	I	S	C
1.	B	D	A	C
2.	A	C	D	B
3.	C	B	A	D
4.	A	D	C	B
5.	D	B	C	A
6.	B	A	D	C
7.	C	D	B	A
8.	B	A	D	C
9.	D	A	C	B
10.	C	B	D	A
11.	A	D	C	B
12.	D	C	A	B
13.	B	A	D	C
14.	C	D	B	A
15.	D	A	C	B
16.	A	B	C	D
17.	B	C	D	A
18.	C	A	B	D
19.	D	B	C	A
20.	A	D	C	B
21.	A	B	C	D
22.	D	C	B	A
23.	D	B	A	C
24.	D	C	A	B
<b>COLUMN TOTALS</b>				

# Let's learn our style



# Dominance style

- Direct
- Results oriented
- Firm
- Strong-willed
- Forceful



# Dominant tendencies

- Getting immediate results
- Causing action
- Accepting challenges
- Making quick decisions
- Taking authority
- Managing trouble
- Solving problems

Basic Motivation = Challenge and Control

# Understanding our Dominance style

- Organize/Lead ministries, teams or committees
- They like to keep busy
- They are not always team players
- They are persistent
- Great people to have on your side
- Fearless
- High expectations of others
- Not aware of others feelings
- Forceful, bottom line people
- Want straight talk & direct answers
- Managerial style – authoritarian

# Dominance responds to a leader who

- Provides direct answers
- Sticks to the task at hand
- Gets to the point
- Provides pressure
- Allows freedom for personal accomplishment





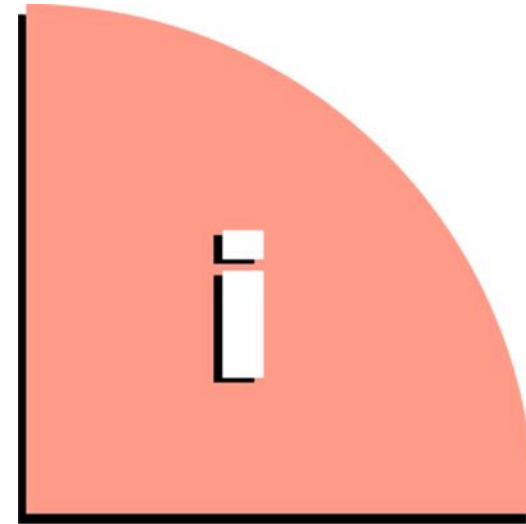
# Dominant – Needs to learn

- You do need people
- Relaxation is not a crime
- Some controls are needed
- Self control is important
- To focus on finish well is important
- Sensitivity to people's feelings is wise



# Influential style

- Outgoing
- Enthusiastic
- Optimistic
- High-Spirited
- Lively



# Influential tendencies

- Contacting People
- Making a favorable impression
- Being articulate
- Creating a motivating environment
- Generating enthusiasm
- Entertaining people
- Viewing people and situations with optimism
- Participating in groups

Basic Motivation = Recognition and Approval

# Understanding our Influential style

- Great public speakers
- Perfect for social committees
- Councillors, Encouragers, Leaders
- They have a network of contacts
- They like people and like to talk
- Good at promoting ideas
- Persuasive and imaginative
- Never embarrass an 'I'
- Poor judge of people
- They like what is new and innovative
- Managerial Style – democratic

# Influential responds to a leader who

- Is fair and is also a friend
- Provides social involvement in work
- Provides recognition of abilities
- Offers rewards for risk taking



# Influential– Needs to learn

- Time must be managed
- Deadlines are important
- Too much optimism can be dangerous
- Being responsible is more important than being popular
- Listening better will improve one's influence



# Steadiness style

- Even-tempered
- Accommodating
- Patient
- Humble
- Tactful



# Steady tendencies

- Performing in a consistent, predictable manner
- Demonstrating patience
- Developing specialized skills
- Helping others
- Showing loyalty
- Being a good listener
- Calming excited people
- Create a stable, harmonious work environment

Basic Motivation = Stability and Support



# Understanding our Steady style

- Great at leading groups
- Great at encouraging and counselling
- Great on Call Centers/Phone
- Have consistent work performance
- Accommodating to others needs
- May not say anything if they disagree
- Modest and Loyal
- Like to help others
- Maintain familiar patterns
- Appreciation = high performance
- Need help getting started on projects
- Managerial Style – Procedural

# Steady responds to a leader who

- Is relaxed and friendly
- Allows time to adjust to change
- Allows to work at own pace
- Gives personal support



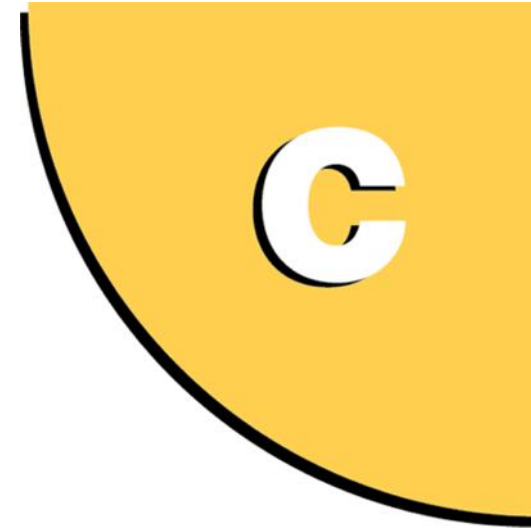
# Steady – Needs to learn

- Total support is not always possible
- Thorough explanation is not everything
- Deadlines must be met
- More optimism will lead to greater success



# Conscientiousness/Cautious style

- Analytical
- Reserved
- Precise
- Private
- Systematic



# Conscientious tendencies

- Adhering to directives and standards
- Concentrating on key details
- Thinking analytically, weighing pros and cons
- Being diplomatic with people
- Using subtle or indirect approaches to conflict
- Checking for accuracy
- Analyzing performance critically
- Using a systematic approach to situations or activities

Basic Motivation = Quality and Correctness

# Understanding our Conscientious style

- Great at Finance & long range planning
- Perfect for research and organizing
- Great organizers and teachers
- They draw conclusions and base action on the facts and rules
- Intuition + Facts = Conclusion
- Prefer to work with people like themselves
- May be shy, don't show feelings
- Very private
- Control their environment
- Only start a project when they are sure of perfection
- Perfection is very important to them
- Tend to be critical of themselves
- They make To Do Lists

# Conscientious responds to a leader who

- Provides reassurance
- Spells out detailed operating procedures
- Provides resources to do tasks correctly
- Listens to suggestions



# Conscientious – Needs to learn

- Total support is not always possible
- Thorough explanation is not everything
- Deadlines must be met
- More optimism will lead to greater success





# How to work with each style



# Customer service strategies – Dominant style

<b>Planning a meeting:</b>	Focus on their goal - minimize their fear
<b>Initiating a conversation:</b>	Get directly to the point
<b>When Interacting:</b>	Be business like.
<b>Responding to a concern:</b>	Don't be discouraged if they are blunt.
<b>Gaining a commitment:</b>	Quickly highlight their key options.
<b>Service Follow through:</b>	Expect efficiency & delivery as agreed upon

# Customer service strategies – Influential style

<b>Planning a meeting:</b>	Be people-oriented
<b>Initiating a conversation:</b>	Casual, friendly talk is appropriate
<b>When Interacting:</b>	Explore their excitement
<b>Responding to a concern:</b>	Accept their feelings or doubts
<b>Gaining a commitment:</b>	Inspire them to action
<b>Service Follow through:</b>	Spare them of personal effort

# Customer service strategies – Steady style

<b>Planning a meeting:</b>	Emphasize how it will be steadying, stabilizing and simplifying
<b>Initiating a conversation:</b>	Responds to information & low-pressure
<b>When Interacting:</b>	Exhibit genuine sincerity
<b>Responding to a concern:</b>	Accept and share their feelings
<b>Gaining a commitment:</b>	Support their decision in a sincere way
<b>Service Follow through:</b>	Expects personal attentions, availability and assistance

# Customer service strategies – Conscientious style

## Planning a meeting:

Be prepared with details and research and address your track record with facts

## Initiating a conversation:

Business like and diplomatic, don't invade privacy

## When Interacting:

Stay on task, minimal small talk

## Responding to a concern:

Respond to their concern with logic and evidence

## Gaining a commitment:

Give options, clarify priorities, use logic

## Service Follow through:

Give assurances for reliability and follow-through in writing and review regularly

**Why does personality identification matter?**



# Quick tips to identify a style

## Dominant style:

- Will look at their watch in a meeting
- May seem annoyed with facts
- To the point
- Straight shooter
- Don't waste their time

## Influential style:

- Tend to dress very well
- Like bling and style
- Focused on fun and parties
- Can have trouble focusing on details
- Want to chat, want to hear about what you are doing for fun
- Wants praise and recognition



# Quick tips to identify a style

## Steady style:

- Will often talk about their family, friends and relationships
- Want to hear about you as a person
- Want to take time to connect and feel secure with you
- Can be hard to get them to open up and share
- They want to be loyal to you, give them a reason to be and they will

## Conscientious style:

- They can seem cold
- They will correct any mistakes in your proposal
- They are precise and detailed
- They are private
- They are cautious and need time to feel secure.
- They are logical and use facts



# DISC Personality Traits

ACTIVE		PEOPLE
TASK		
D	I	
Active, fast paced	Outgoing	
Strong willed, determined	Enthusiastic, expressive	
Goal oriented	Dominates conversations	
Serious, controlling	Enjoys the limelight	
Competitive	Often doesn't follow through	
Confrontational	Fun to be with, animated	
Driver, makes it happen	Disorganized	
Logical and decisive		
C	S	
Information gathering	Good Listeners	
Analytical (sometimes overly)	Supportive, compassionate	
Talented, creative	Passive, soft spoken	
Reserved, introspective	Resistant to change	
Perfectionist, meticulous	Likes detailed directions	
Sees problems, not solutions	prefers to follow, not lead	
Loyal	Not hurried, slow to move	
Sensitive	Conservative	
PASSIVE		

# Want to learn more?

Here are some resources for you:

[Thedispersonalitytest.com](https://thedispersonalitytest.com)

[Discprofile.com](https://discprofile.com)

[Discinsights.com](https://discinsights.com)

\*I do not endorse any of these sites.

# Summary

Take the time to master identifying personality styles and you will find that all your relationships will become better and more productive!

Thank you!



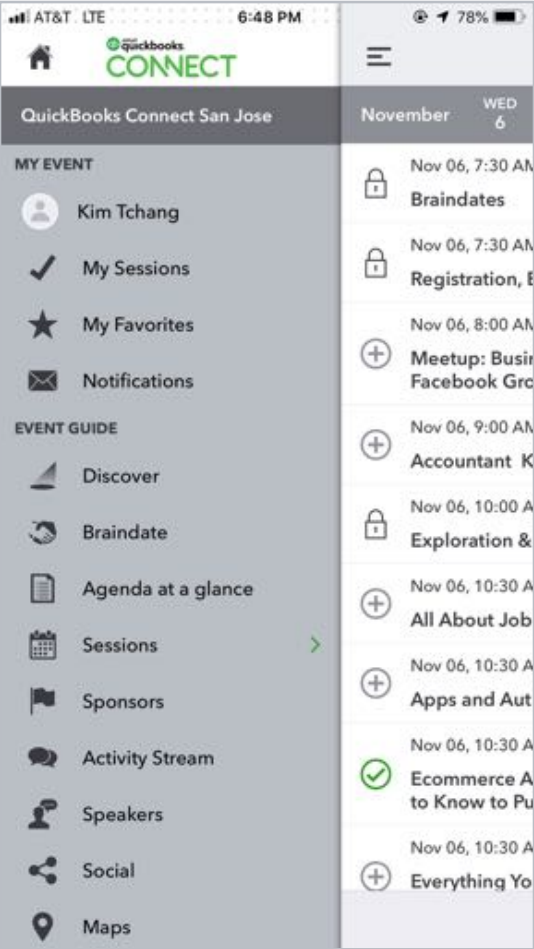


# Questions?

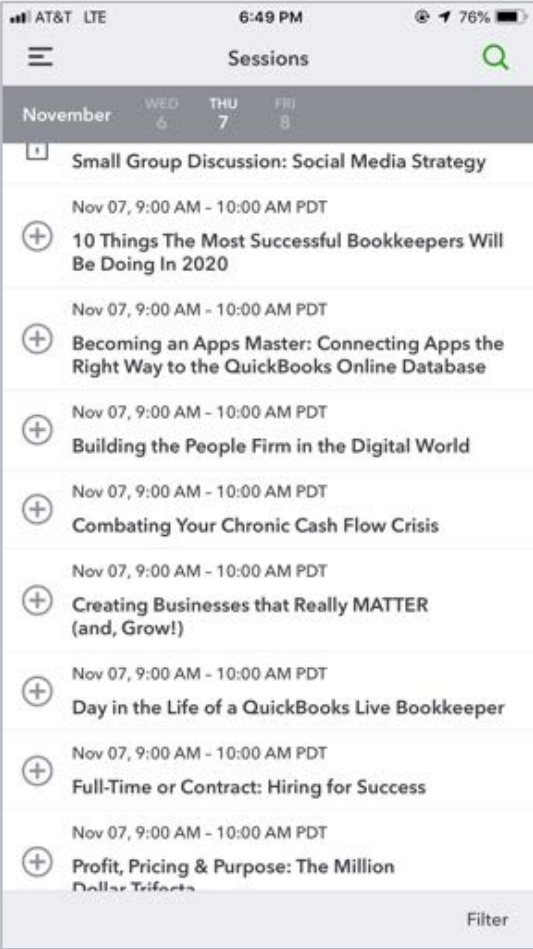
# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

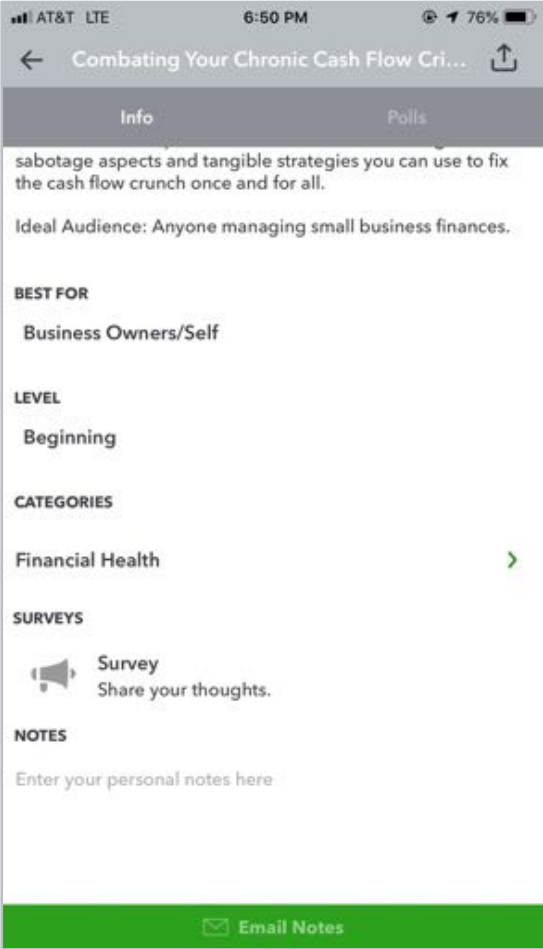
1. Select Sessions



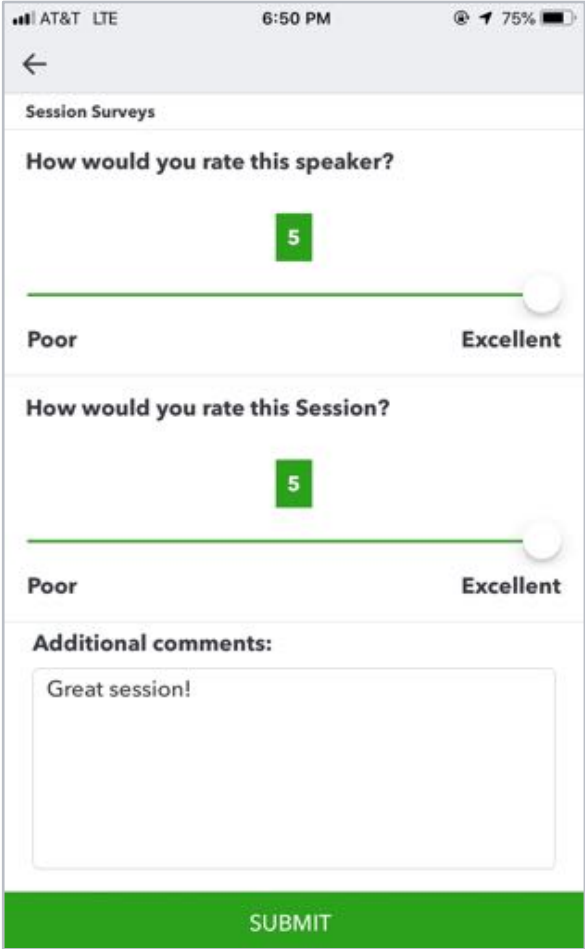
2. Select Session Title



3. Select Survey



3. Add Ratings



# Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://can.quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect Canada agenda page for December 10, 2023. The page is titled "December 10" and "Accountant Day". It features a navigation bar with links: Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, and FAQ. Below the navigation bar, there is a section for "December 9 Accountant Day" and "December 10". A "Print Agenda" link is visible in the top right corner. The main content area includes a search bar labeled "Search for sessions" and a filter section with buttons for "Organizational Culture", "Life & Business Skills", "Technology Training", "Business Growth", "Advisory", and "Financial Health". An "Expand all +" link is also present. The agenda list shows sessions from 7:30-9:00 am to 11:00 am-12:00 pm. The sessions are: Registration, Breakfast & Exploration; Meetup: New to Networking; Morning Keynote; Exploration & Connection; Meetup: Women in the Workforce; and Breakout Sessions. The Breakout Sessions section is expanded, showing details for "Creating Your Small Business Culture", including a description, ideal audience, best for, speakers, location, track, CPD hours, and level. Other breakout sessions listed are "Understanding Personalities for Better Communication" and "How to Use QuickBooks for Your Small Business: Introduction".

QuickBooks CONNECT

Why Attend Agenda Speakers Pricing Sponsors Travel FAQ

December 9 Accountant Day December 10 December 11

Print Agenda

Attend breakout sessions to learn strategies to grow your business, how to hire and build an ideal culture, tips to improve your financial health and more. Connect with peers and experts for one-on-one learning. More information coming soon.

Search for sessions

Filters: Organizational Culture Life & Business Skills Technology Training Business Growth Advisory Financial Health Expand all +

7:30-9:00 am Registration, Breakfast & Exploration +

8:00-8:45 am Meetup: New to Networking +

9:00-10:00 am Morning Keynote +

10:00-11:00 am Exploration & Connection +

10:15-11:00 am Meetup: Women in the Workforce +

11:00 am-12:00 pm Breakout Sessions

Creating Your Small Business Culture

Many solopreneurs and small business owners feel like they don't have time to work on their company culture (or that they even should). Instead, they spend most of their days working in their business rather than "on" their business. In this session, you will receive tips on how to reduce stress, improve productivity, and improve your personal fulfillment all through the nurturing of your crew, your clients, your fans, AND yourself!

Ideal Audience: Business owners looking to enhance their culture.

Best for: Business Owners/Self-Employed

Speakers: Tamia Madarasz

Location: Room 201 CDEF

Track: Organizational Culture

CPD Hours: 1

Level: Introduction

Understanding Personalities for Better Communication +

How to Use QuickBooks for Your Small Business: Introduction +



OWN  
THE  
FUTURE