



## PREDICTIVE INDEX FUNDAMENTALS

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# Predictive Index Fundamentals

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## OVERVIEW

Welcome to the Predictive Index (PI) Fundamentals course. Once you complete IT Initial training, you are going to be tasked to discuss your PI results with your Team Lead. You will be expected to discuss your 1:1 Relationship Guide and Management Strategy Guide with your Team Lead. You will talk about your results and how you prefer to interact with your Team Lead and other team members. Since the results are a guide, you may or may not agree with the results. This meeting is a great opportunity to discuss this. This course offers the opportunity to practice discussing your PI results and interpreting the two guides.

## OUTCOMES

There are two outcomes for this course:

- Discuss your respective Predictive Index results
- Practice interpreting the Predictive Index 1:1 Relationship and Management Strategy Guides

## WHAT IS IN IT FOR ME?

At some point you will be asked to meet with your Team Lead to talk about your PI results. What would you like to get from this course to help you with that? Write down what you would like to learn in this class.

## WHAT IS THE PREDICTIVE INDEX?

The Predictive Index (PI) is a framework for understanding behaviors. We use it to learn about our own personality type as well how to interact with others. UWM's IT and IT Recruiters use it to see what motivates us and understand our interactions with each other.

The Predictive Index:

- Provides a framework for understanding behaviors
- Based on science
- Used for candidate fit and team member development
- Uses 4 primary factors

To access your own Predictive Index results:

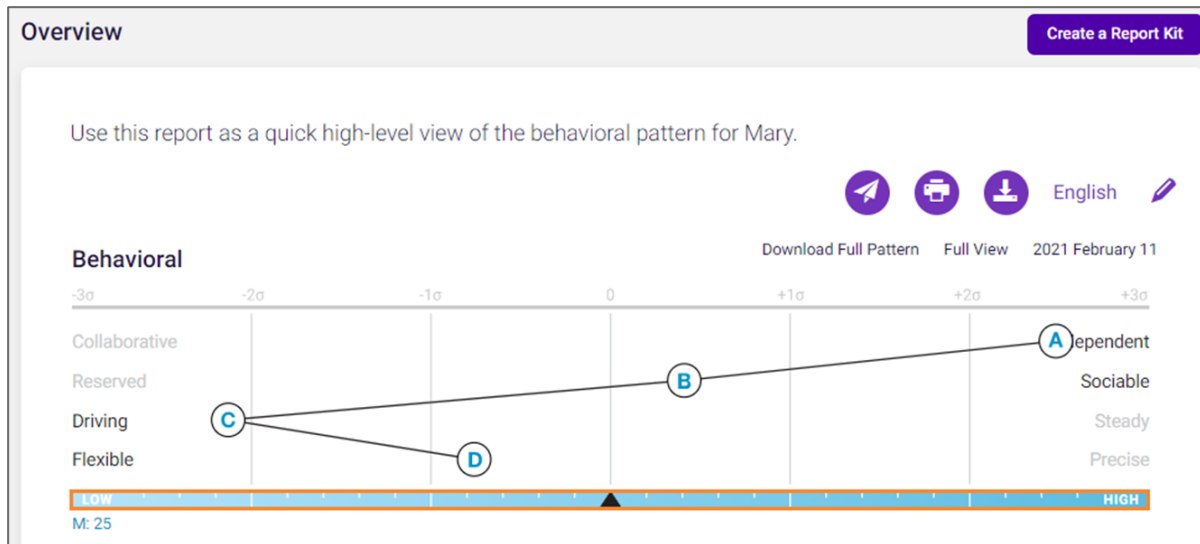
1. [Predictive Index](#)<sup>1</sup>.
2. Enter your userid and password.
3. In the search bar, enter your name, and press Enter.



4. Click on your name to access your results.

### NOTES:

Factors on the left side of the center represent a low amount of that factor, while those that fall to the right mean you have a higher amount. Factors further away from the center are stronger than those at the center, meaning people express behaviors associated with factors further away more forcefully. People in the middle are considered moderate and can flex in either direction.



The chart below shows the four factors. It also includes the 2 primary combinations that are taken into account when assessing the results.

FACTOR CODE	FACTOR	EXPLANATION
A	Dominance	The drive to exert one's influence on people, events, or outcomes.
B	Extraversion	The drive for social interaction with other people.
C	Patience	The drive for consistency and stability at work. It also shows how we handle change.
D	Formality	The drive to conform to rules and structure.
B/C	Extraversion/Patience Combination	Determines if you're "quick to connect" or if you prefer waiting until you know the person a little better to feel connected.
A/D	Dominance/Formality Combination	Determines whether you are cautious or comfortable with risk.

Reference the chart below to learn more about the other factor combinations:

## Factor Combinations

Orientation	<b>A &gt; B   Task Oriented</b> <ul style="list-style-type: none"> <li>Critical, creative thinker</li> <li>Technical orientation</li> <li>Inquiring mind</li> <li>Problem solver</li> <li>Limited delegation of authority</li> </ul>	<b>B &gt; A   People Oriented</b> <ul style="list-style-type: none"> <li>Empathetic</li> <li>Persuasive</li> <li>Sociable</li> <li>Service Oriented</li> <li>Delegates authority</li> <li>Comfortable on a team</li> <li>Unselfish</li> </ul>	Connection	<b>B &gt; C   Quick to Connect</b> <ul style="list-style-type: none"> <li>Fluent</li> <li>Fast-talking, lively</li> <li>Enthusiastic</li> <li>Optimistic style of expression</li> <li>Persuasive, stimulating</li> <li>Motivates others</li> <li>Positive communication</li> </ul>	<b>C &gt; B   Takes Time to Connect</b> <ul style="list-style-type: none"> <li>Reserved</li> <li>Quiet</li> <li>Serious with unfamiliar people</li> <li>Comfortable with the familiar</li> <li>Introspective</li> <li>Takes time to think</li> <li>Organizes before expressing self</li> </ul>
	<b>A &gt; C   Proactive</b> <ul style="list-style-type: none"> <li>Takes initiative</li> <li>Competitive</li> <li>Driven to get things done</li> <li>Positive response to pressure</li> <li>Fast-paced</li> <li>Achievement-oriented</li> <li>Impatient with routine</li> </ul>	<b>C &gt; A   Responsive</b> <ul style="list-style-type: none"> <li>Consistent with repetitive work</li> <li>Cooperative with others</li> <li>Tolerant</li> <li>Patient</li> <li>Dependable</li> <li>Easygoing</li> </ul>		<b>B &gt; D   Informal</b> <ul style="list-style-type: none"> <li>Extraverted</li> <li>Outgoing</li> <li>Uninhibited expression of friendliness</li> <li>Poised</li> <li>Informal in social situations</li> <li>Enthusiastic, persuasive talker</li> <li>Engaging conversationalist</li> </ul>	<b>D &gt; B   Formal</b> <ul style="list-style-type: none"> <li>Serious</li> <li>Disciplined</li> <li>Sincere</li> <li>Reserved, formal and quiet</li> <li>Factual conversationalist</li> <li>Sensitive to criticism</li> <li>Cautious with new people</li> </ul>
	<b>A &gt; D   Comfortable with Risk</b> <ul style="list-style-type: none"> <li>Independent</li> <li>Individualistic</li> <li>Self-confident</li> <li>Firm</li> <li>Decisive</li> <li>Venturesome</li> <li>Resistant to authority</li> </ul>	<b>D &gt; A   Cautious with Risk</b> <ul style="list-style-type: none"> <li>Cooperative</li> <li>Supportive</li> <li>Willing and helpful</li> <li>Need for rules and structure</li> <li>Accurate and careful</li> <li>Concerned about criticism</li> <li>Conservative</li> </ul>		<b>C &gt; D   Casual with Rules</b> <ul style="list-style-type: none"> <li>Persistent</li> <li>Casual</li> <li>Stable</li> <li>Limited concern about rules or details</li> <li>Comfortable with ambiguity</li> <li>Easygoing</li> <li>Relaxed</li> </ul>	<b>D &gt; C   Careful with Rules</b> <ul style="list-style-type: none"> <li>Conscientious</li> <li>Thorough</li> <li>Precise</li> <li>Concerned with rules and accuracy</li> <li>Strong follow-up</li> <li>Strict about punctuality and correctness</li> <li>Comfortable with clarity</li> </ul>
Action			Interaction		
Risk			Rules		

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## NOTES:

## REFERENCE PROFILES:

The reference profile can be looked at as a summary of a person's personality. It is a quick reference to what the behavioral overview provides. The chart below provides a description of each of the reference profiles.

Reference Profile	Description
 Scholar	Accurate, reserved, imaginative, and seeks a high-level of technical expertise
 Altruist	Congenial and cooperative with an efficient, precise work ethic
 Captain	Problem-solver who like changes and innovation while controlling the big picture
 Controller	High-quality, detail-oriented, and conservative with a preference for technical expertise
 Guardian	Unselfish and approachable with a preference for detailed, skill-based work
 Maverick	Innovative, "outside-the-box" thinker, undaunted by failure
 Specialist	Highly precise worker, skeptical while respecting authority

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 Venturer	Self-starter, self-motivator, risk-taker with strong goal-orientation
 Adapter	Bridge-builder, able to adapt to situations easily
 Analyzer	Intense, high standards with a disciplined and reserved personality
 Persuader	Socially poised, risk-taker; a motivating team-builder
 Promoter	Casual, inhibited; a persuasive extravert with a tendency for informality
 Individualist	Highly independent and persistent, while remaining results-oriented
 Strategist	Results-oriented, innovative and analytical with a drive for change
 Operator	Patient, conscientious and relaxed; a cooperative team worker
 Collaborator	A friendly, understanding, willing, and patient team player



Artisan

Accommodating, analytical, producing highly precise and accurate work

## ACTIVITY 1: DISCUSS YOUR PI RESULTS

You will work in pairs, or groups of three if needed. Pull up your own PI assessment if you haven't already. Discuss your own PI results with the other person in your group. Be sure to also look at your reference profile. You will have 5 minutes to do this.

Your PI results should have been emailed to you. If not, you can access them at:

1. [Predictive Index](#)<sup>1</sup>.
2. Enter your user ID and password.
3. In the search bar, enter your name, and press Enter.



4. Click on your name to access your results.

## NOTES:

### REVISIT

Take 2 minutes to write down 2 things that you discussed with someone about your own PI results.

### INTERPRETING THE GUIDES

Now that you can discuss your own PI results, you are going to practice interpreting the 1:1 Relationship Guide and the Management Strategy Guide.

### 1:1 RELATIONSHIP GUIDE

The 1:1 Relationship Guide helps two team members manage, and potentially avoid conflict, by understanding their behaviors. The table below explains the key areas of this guide.

#### THE FACTORS:

SECTION	EXPLANATION
Relationship Strengths	The strengths that two team members share that allow them to work well together.
Relationship Cautions	Provides information on how two team members might conflict.
Relationship Tips	Offers tips to help improve communication between two team members.

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NOTES:

## MANAGEMENT STRATEGY GUIDE

This guide is helpful for Team Leads, or even other team members, to help them more effectively interact with others based on their individual behavioral needs. It provides strategies on how you like to interact in the workplace, how you like to take action and how you deal with risk in decision making. It basically shows how we want to be managed.

But, this guide is not written in stone. It is just a guide. It is important to remember to talk to team members to confirm what they need.

NOTES:

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## ACTIVITY 2: PRACTICE INTERPRETING THE PREDICTIVE INDEX 1:1 RELATIONSHIP AND MANAGEMENT STRATEGY GUIDES

You will work in pairs, or groups of three if needed. Pull up your Management Strategy Guide for yourself and download it. Refer to the Accessing the 1:1 Relationship Guide and Accessing the Management Strategy Guide sections if you need further assistance.

Pull up the 1:1 Relationship Guide. You will enter a partner's name in the Select a Person field. Working with your partner, review your guides and discuss your interaction strategies with your partner. Determine if the guide is accurate with your thoughts and how you would approach the other person with concerns or praise. Include your interpretation of the Management Guide and how you would incorporate it in your discussions. You will have 8 minutes to do this.

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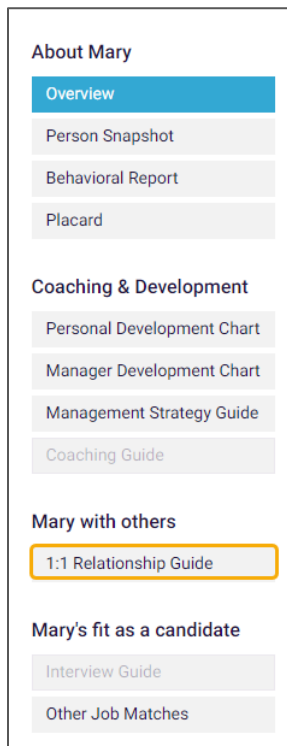
## ACCESSING THE 1:1 RELATIONSHIP GUIDE

To access the 1:1 Relationship Guide, follow these steps:

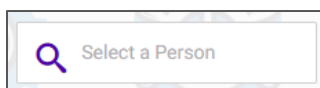
1. [Predictive Index](#)<sup>1</sup>.
2. Enter your userid and password.
3. In the search bar, enter your name, and press Enter.



4. Click on your name to access your results.
5. Select Management Strategy Guide from the menu to display your guide.



6. Enter your partner's name in the Select a Person field and press Enter to display the 1:1 Relationship Guide.



## ACCESSING THE MANAGEMENT GUIDE

Your Management Guide should have been emailed to you. If not, you can access it at:

1. [Predictive Index](#)<sup>1</sup>.
2. Enter your userid and password.
3. In the search bar, enter your name, and press Enter.



4. Click on your name to access your results.
5. Select Management Strategy Guide from the menu to display your guide.

Management Strategy Guide

## REVISIT

Take 2 minutes to write down 1 thing that you can use from the Predictive Index 1:1 Strategy Guide or the Management Guide that you can use in your role. Then share that with someone sitting next to you.

## ADDITIONAL TRAINING

If you are interested in additional free training, refer to [PILearn](#)<sup>2</sup> on the Predictive Index website.

## CLOSING THOUGHTS

Take a minute or two to think about what you might discuss with your Team Lead. Maybe you want to discuss points in your report that you don't agree with. Maybe you want to ask your Team Lead how they want to be approached. Think about the activities you did and what may be pertinent to your discussion. Then write down 2 or 3 discussion points to have with your Team Lead.

## REFERENCES

- <sup>1</sup> <https://www.predictiveindex.com/>
- <sup>2</sup> <https://www.predictiveindex.com/learn/>

**If you have any questions or concerns,  
please reach out to IT Training at [ITTraining@uwm.com](mailto:ITTraining@uwm.com).**

