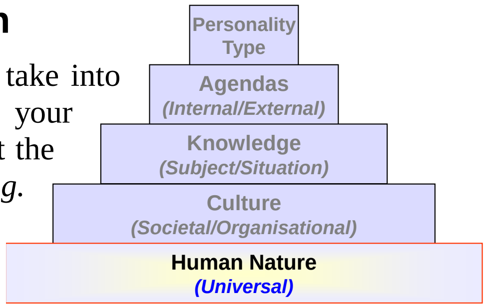
COLLECTING PROFILING INFORMATION

This document explains how you can collect profiling information on an audience or individuals. Most importantly, this gives practical advice for collecting the types of information discussed in Chapter 9 of the book *'Persuasion and Influence – The Science and Art of Effective Presentation' (which is discussed later in this document).* Each of the following subsections equates to a tier within the profiling pyramid, which is covered in that book.

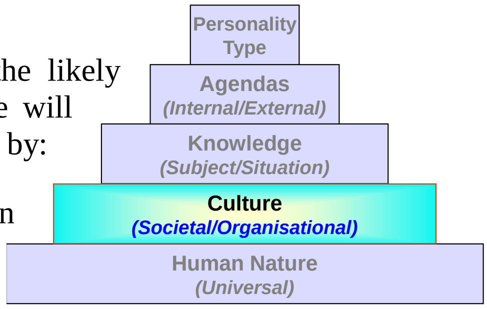
Collecting the Human Nature Information



There are of course many aspects of human nature to take into account, when developing an understanding of your audience. The best idea is simply to take into account the basic ones that would be likely to affect you *(e.g. attention spans).* These types of issue reflect universal traits. You can then try to collect information on other factors like the gender, age, health, and the circumstances of an audience, because these modify these universal traits.

Steps 2 and 5 in the profiling process will help you to structure the content of the presentation to reflect subtle differences in human nature. For instance, an individual's state of health can have an effect on their personality and intelligence[(1)]. As an example, someone who is sick *(e.g. influenza or the common cold),* or suffering physical discomfort *(e.g. back pain)* may be less attentive, because their discomfort will act as communications interference. You therefore need to be watchful for this type of problem, and be willing to change the presentation approach, to match the audience member's needs *(particularly if that person is a key decider).*

Collecting the Cultural Information



Where it is appropriate to do so, try to work out the likely cultural issues that may affect the way your audience will think about your message. You can often achieve this by:

✓ ***Making Cultural Assumptions.*** You can begin by looking at the society in which your target audience lives. This can be as simple as finding out which country they were born in, or live in now. Even this simple information can tell you a great deal about the way they will think. For example, when presenting to Thai nationals, you can expect that the audience will prefer a less forthright and non-aggressive presentation style. However, you should take great care to avoid jumping to too many conclusions without conducting detailed research. This pitfall is illustrated by the example in the following focus box *(overleaf)*[(2)].

USE CULTURAL ASSUMPTIONS CAREFULLY

Some years ago, I was required to conduct an important business presentation. The key decider for this business presentation was named Wong and he worked for a company with strong roots in South East Asia. I assumed that Mr. Wong was of Chinese origin and that his thought patterns would reflect the Chinese culture. I therefore developed the presentation to reflect this cultural orientation. When I finally met him, I found that the Wong family had been in Australia for eight generations, and he certainly did not look like the person in the picture to the left, which is what I had imagined. As it transpired he was steeped in the Australian culture, and many of the techniques that I had planned to use were therefore completely ~~Wong~~ wrong!

✓ ***Talking and Listening.*** Where appropriate, you should talk to key members of the target audience, or those around them, before designing the message. In many cases, these discussions can just be a simple chitchat. For instance, if you detect an accent from a key member of the audience you can ask them where they come from. This can often give you excellent clues to the societal culture that will influence them. Additionally, by discussing the issues with these people, you can often identify the organisational values that may affect the group. As an example, I was talking with a Government official some years ago in preparation for an important sales presentation. It became clear that the culture within his organisation was highly risk averse. I therefore pitched the presentation to reinforce the fact that the recommended solution was very low risk. The Government department appreciated this approach, and they awarded the contract to the organisation with which I was working.

✓ ***Looking Around.*** You can sometimes take the opportunity to visit members of the target audience before the presentation, and take some time to look around. Quite often, you will see things that help you understand the cultural background of members of the target audience. For instance you might detect:

➢ ***Societal Culture Issues.*** People often display emblems of their culture, which range from their country of origin *(e.g. showing flags on their car, or in their office)*, to indications of their religion *(e.g. a picture of the Virgin Mary on the wall of an audience member's office is likely to indicate that they are Catholic)*. Even small things like the pictures of their family on the desk can sometimes give you clues about the cultural issues that may shape their thinking.

➢ ***Organisational Culture Issues.*** In some situations, you can get clues to the organisational culture by looking out for artefacts. Artefacts include things like the décor and layout of the business, as well as the interactions between the people in that organisation. As an example of the types of information you can collect, have a look at the picture to the right. I am sure that you gained a number of impressions from this picture, which probably include:

The Boss

▫ ***Open Plan Office.*** You will have noticed that this is an open plan office, with low cubicle walls.

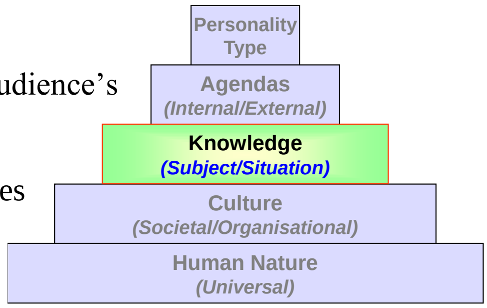
Most importantly, the boss is working out in the cubicles as well. This may indicate that this business culture focuses on teamwork and open communication. Alternatively, the boss' office location may indicate that he is highly controlling, and he wants to keep his eye on his employees all the time. You would therefore need to look for more clues to clarify the situation.

- ***Relationships between People.*** If you look at the way people are interacting *(e.g. two people chatting at the water cooler in full view of the boss)*, it is clear that this is a relaxed working environment. You might therefore be able to assume that the culture leverages teamwork and open communication, rather than the boss wanting to control everything.

- ***Colours and Décor.*** The office colours and décor also appear to be designed to create a relaxed environment. In this case, you can therefore probably infer that this is an egalitarian culture, and you could then use this information when developing your message.

As illustrated by these examples, you can often gain critical insights into your audience by identifying some very simple information.

Collecting the Knowledge Information



You can often gain an understanding of your target audience's knowledge through:

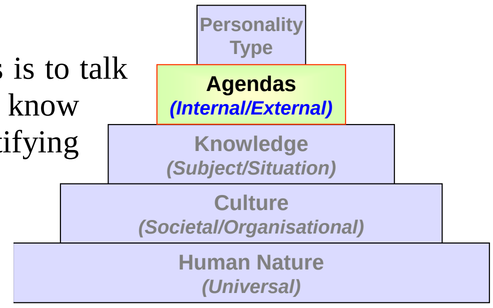
- ✓ ***Role Identification.*** The first method involves identifying audience member's roles in their organisation. This data is often relatively quick and easy to find, but the insights this information provides can often be quite profound. For example, a computer software engineer is probably going to have a good knowledge of software issues. On the other hand, the Chief Financial Officer (CFO) of a company is likely to have a good grasp of financial and accounting issues *(or at least one would hope this would be the case)*. You can therefore factor in this information when determining how you will develop your message.

- ✓ ***Talking and Listening.*** Where it is appropriate, you can talk to key members of your target audience before the presentation. This approach can often be the best way to find out what key deciders and influencers know, because you can directly identify their level of experience and expertise. More importantly, these types of conversation can often be the best way to identify any mental baggage that they may be carrying.

- ✓ ***Finding out their Qualifications.*** Another simple way of figuring out what key members of your audience know is to find out about their qualifications and experience. This can often be achieved by asking them *(or those around them)* about their qualifications, getting their biographical information *(e.g. from their corporate website)*, or simply looking at their business card.

By identifying this type of information, you can work out how to develop your message more effectively, as discussed in Chapter 9 of the book.

Collecting the Agenda Information



Typically, the best way to identify agendas and drivers is to talk with key audience members, and other people who know them. Clear indicators that may be of use in identifying these agendas are:

- ✓ ***Past Promotion.*** A great deal can be determined about an individual's ambitions by identifying their employment history. As an example, an individual who has remained in the same job for 20 years is probably not strongly ambitious.

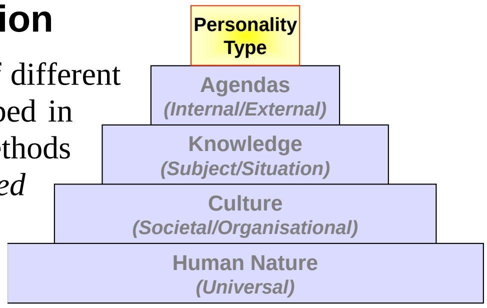
- ✓ ***Office Relationships.*** In some cases, an individual's relationships with others in the workplace can provide excellent insights into their personal agendas. For instance, hostility between peers may indicate the presence of political tensions. Such political interplay can sometimes be used to set the theme for a presentation *(as long as you pick the more powerful side in the interplay)*. In most cases, however, it is better to remain politically neutral.

- ✓ ***Anecdotal Information.*** In my experience, one of the richest sources of agenda information is stories about people and their actions in the organisation. You can source these anecdotes by talking to other people who know members of your target audience. As an example, some time ago I was sourcing agenda information from the secretary of a key decider. She told me many stories of backstabbing and intrigue carried out by this key decider *(so he could be promoted)*. I was therefore in no doubt about his personal agenda.

> **WARNING**
> When collecting anecdotal evidence, be careful about believing everything you hear. Remember everyone has personal agendas, and these can bias the information they provide.

The collection of this type of personal agenda information can therefore give you important insights, which you can use to shape your message.

Collecting the Personality Type Information



You can identify information on the personality type of different individuals and groups by using the techniques described in Chapter 9 of the book. The first two of these methods provide a very useful SWAG *(Scientific Wild Assed Guess)* approach. These can give you a reasonable starting point for understanding many people with whom you need to communicate.

The third method is much more refined and reliable, because it leverages a technique called Emblematic Analysis. However, this approach is less commonly used for communicating with large groups, because it is often not practical to collect the required information. That being said, it can be very useful to people working with smaller groups or individuals. As an example, when conducting Business to Business (B2B) or Business to Government (B2G) marketing there are often key decision makers who need to be persuaded. In these circumstances, it may well be worth your while to conduct an Emblematic Analysis, so you can properly target your message. For this reason, the Emblematic Analysis methodology is also discussed very quickly in this handout.

Emblematic Analysis is simply a grandiose way of saying that you can find out the Myers Briggs Type Indicators (MBTI) of a person by observing how they interact with you or other people around them. This is achievable because people tend to show their personality preferences when relating to others during the course of their normal work. For example, a strong ST[*] manager is likely to ask people to report to them by providing tangible evidence *(indicating a Sensing preference)*, in a logical and rational manner *(signifying a Thinking preference)*. Alternatively, a manager with a strong NF personality type may regularly ask their staff how a decision will affect the organisation's Vision *(illustrating an iNtuition preference)* and Values *(indicating a Feeling preference)*.

These desires can therefore act as detectable *Emblems* for a person's MBTI preferences. In my experience, people often give out these types of signals, which are effectively like flying a big flag telling others what their personality preferences are. All you need to do is know what to look for.

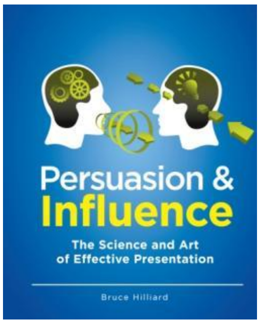
To help you in this endeavor you can use the Emblematic Analysis sheet, which is supplied at the following web location:

http://www.seahorses-consulting.com/persuasion_influence/EmblematicAnalysis.pdf

Research has shown that this form can be as accurate as the person filling out a validated MBTI form on themselves[(3)]. You can therefore use this form to gain useful insights into your target audience and other people with whom you work.

Using the Information

The information you collect through these methods can be applied to significantly enhance numerous aspects of your interpersonal relationships. As an example, you can use this knowledge to substantially improve your ability to communicate with other people. You can read more about this approach in the book *'Persuasion and Influence – The Science and Art of Effective Presentation'*.



This ground-breaking book simplifies wide-ranging research into the psychology of effective communication, so anyone can apply the powerful techniques needed to communicate more effectively and influence other people. In practical terms, this means that you can readily use this information to optimise any message, whether you need to teach others, sell something, or just generate personal success.

You can order a copy of this book online at:
http://www.amazon.com/gp/product/B00GWC00AA.

You can also download other free *(and very useful)* documents from this web site: http://www.seahorses-consulting.com/persuasion_influence.html

* These are Myers Briggs Type Indicators (MBTI). If you are unsure what these types mean, you can download an introductory file on the topic from the following web site: http://www.seahorses-consulting.com/persuasion_influence/MBTI_Introduction.pdf .

Alternatively, if you have a query and you would like to contact the author, you can send an email to info@seahorses-consulting.com.

END NOTES

1. Lucas, E. 1993, *'The Mind at Work'*. Millbrook Press, Brookfield, Connecticut. pp. 98-99.
2. The name of the person in this focus box has been changed.
3. To formally test the effectiveness of the Emblematic Analysis system, a trial was conducted at the University of Western Australia at the beginning of 2004. In this trial 66 people filled out Emblematic Analysis sheets on people that they knew. The individuals tested using Emblematic Analysis (the Subjects) were also assessed using a validated MBTI Instrument, known as Form F. By following this approach, the trial was able to measure the accuracy of the Emblematic Analysis system in relation to a proven MBTI testing method.

   The results of this analysis showed that the reliability of the Emblematic Analysis was similar to the validated instrument (Form F). According to the information in the MBTI Manual *(see below)*, the average accuracy of the validated instrument is 72.4%. This relatively low average is often caused by the fact that people without strong preferences may not always get a clear indication of their true type by using the validated instrument.

   When the results of the Emblematic Analysis were tested against the findings from the validated instrument, the results were very similar. Emblematic Analysis also provided the right answer over 70% of the time. Emblematic analysis can therefore give you insights with about the same level of validity as the person filling out the MBTI instrument on themself.

   Information about the reliability of the validated instrument is drawn from Briggs Myers, I., McCaulley, M.H., Quenk, N.L. Hammer, A.L., 1998, *'MBTI Manual. A Guide to the Development and Use of the Myers-Briggs Type Indicator'*. 3rd Edition, Consulting Psychologists Press Inc, Palo Alto, p. 116. The average cited here takes into account the full range of the validity findings.