

Crystal Cheat Sheet

HOW TO HAVE AN EFFECTIVE CALL OR MEETING

When planning a call or meeting, it's important to consider the following three questions: What do they want? Why do they want it? How do they want to interact?

By thinking in this way, you're setting yourself up for effective, empathetic communication.

Dominant Personalities

BE DIRECT, VISIONARY, RISK-TOLERANT

DO

- ✓ Get to the point of the conversation
- ✓ Ask direct questions
- ✓ Ask them to choose the time or place

DON'T

- ✗ Engage in small-talk
- ✗ Be passive or reserved
- ✗ Let the call or meeting run past its scheduled time

Influential Personalities

BE PERSONABLE, ADAPTABLE, ENTHUSIASTIC

DO

- ✓ Ask for a more immediate meeting or call time
- ✓ Engage in small-talk and build rapport
- ✓ Remain enthusiastic and empathetic

DON'T

- ✗ Speak in a serious tone
- ✗ Involve too many details
- ✗ Schedule far in advance

Conscientious Personalities

BE METHODICAL, PRAGMATIC, RISK-AVERSE

DO

- ✓ Provide evidence to support claims
- ✓ Use business-like language and tone
- ✓ Communicate the most important details beforehand in writing

DON'T

- ✗ Interrupt or change the subject
- ✗ Make claims that you can't support
- ✗ Involve unnecessary small-talk

Steady Personalities

BE THOUGHTFUL, DIPLOMATIC, RISK-AVERSE

DO

- ✓ Ask questions about how they're feeling
- ✓ Thank them for their time
- ✓ Maintain a warm tone

DON'T

- ✗ Be blunt or forceful
- ✗ Require an immediate decision
- ✗ Forget to engage in friendly, casual conversation first