

# Transform Your Meeting with Psychographics



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## Transform Your Meeting with Psychographics

Psychographics sound scary. The word alone conjures up images of mind-reading experiments and government plots driven by sinister motives. Suspend these sci-fi fantasies and consider for a moment that psychographics promote not conspiracy, but instead connection.

Understanding how an audience thinks and feels or how they react to and retain information is invaluable. This understanding connects the audience to the content as well as to the presenter. It transforms a meeting from an isolated, impersonal experience to a dynamic hub of interaction.

With access to psychographic information, we can predict what products and services attendees will purchase and who will ultimately do business with an organization. At a meeting, we can personalize content and engagement to fit the personality and learning style of every individual to increase knowledge retention.

Sure, you can plan and execute a meeting without engagement technology and psychographic insight. You can also embark on a cross-country road trip in the middle of the night without a map or GPS. But, in both cases, you are relying heavily on wishful thinking and a dangerously inflated sense of direction.

Leading meeting organizations are already using second screen technology to understand their audience and provide more personalized experiences. By looking at two unique facets of psychographics, namely personality and learning style, we can dissect the way we do meetings and rebuild them in the most effective way possible.

# Personality Type

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Psychology 101 tells us that no human is exactly like another, but this same science helps us understand that shared characteristics can be used to group people into distinct types. From the Myers-Briggs Type Indicator to DiSC® profiling, color typing to Clifton's StrengthFinder, and everything in between, we can quickly understand that a single, uniform experience like a conference or a meeting will affect people in wildly divergent ways.

By understanding different personality types through questionnaires and other means, meetings can be transformed. Organizers can include different types of testing in a pre-registration activity to identify the various personalities. Equipped with this information, they can develop different learning tracks or activity schedules that attract and engage different audience members.

At the meeting itself, large sessions and break-out groups can be stratified and personalized. Through surveys and polling, the audience can self-select into different, smaller groups. They can guide their own break-out sessions and form sub-groups of people who are wired similarly.

Perhaps the most ubiquitous personality test, the Myers-Briggs Type Indicator, looks at eight different traits that impact how an individual sees, understands, and interacts with the world. A quick understanding of these eight traits should help you see the potential for psychographics to transform meeting experiences.

## Introverted v. Extroverted

Extroverted people enjoy frequent human interaction. They gain energy by spending their time on relationships. Introverts are the opposite. Unlike their extroverted counterparts, introverts need time alone to recharge and can be easily overwhelmed and frustrated by large group activities and forced interaction.

By understanding where people fall on this personality spectrum, meeting planners can structure their events in ways that provide options for either kind of personality. In a large session, meeting organizers can offer multiple avenues for questions and interaction. While the extrovert might thrive on walking up to a microphone and addressing the entire room, an introvert would might shy away from participating. Instead, why not offer a way to submit questions or responses online, or anonymously?

In a similar way, introverts might process dense informational sessions best with slides, solitary review, and time for personal reflection. Extroverts, on the other hand, would likely retain the most information by pausing periodically to engage in a small group conversation about the new material.

## Intuitive v. Sensing

For people who gravitate toward intuition, they relate to stories and find associations between disparate things. A sensing person is more logical and linear, seeing everything in a distinct order. An intuitive person asks, "Why?", while a sensing person asks, "What?" The ways that these different personalities learn can be incorporated into the same meeting, and the way information is presented will likely look quite different.

For example, if a pharmaceutical company wants to teach protocol, a sensing member of the audience will respond to a clear, informative explanation of the protocol itself. An intuitive person will need a little more context. In order to digest the information effectively, those who are intuitive may need case studies, stories, and real-world applications.



## Thinking v. Feeling

When thinkers understand that feelers respond with emotions, and when feelers recognize that thinkers react with opinions, the result will be better meetings, better polling, and more intuitive follow-up. Engage individuals on the thinking end of the spectrum with opinion questions that ask what they thought about a session. For feelers, ask how they felt.

New technology offers the ability to push non-verbal surveys throughout an event. Instead of asking for a response with words, give the option of three emoticons and they can choose which best corresponds to their feelings at that moment. Someone who is more of thinker might want to dialogue about the challenges or positive experiences at the event.

## Perceiving v. Judging

The last set of personality traits, perceiving as opposed to judging, can also be interpreted as "openers" in contrast to "closers." Perceivers can operate effectively within ambiguous boundaries and unanswered questions. Judgers need more clear distinction.

In the live meeting space, specifically in terms of follow-up, perceivers would appreciate an open-ended essay question, while judgers prefer multiple choice and defined options. In a customer-facing meeting, judgers would be motivated by a closing call-to-action with a clear decision to be made. Perceivers would want ample time to process and consider options.

# Learning Styles

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How a person learns impacts what they hear, how they process and what they take away. If you have ever given verbal directions to a visual learner, you know what I mean. A visual person is left with a blank stare and a strong desire for a map. You could give the same exact directions to an auditory learner and they will capture every detail of your instructions.

Just like understanding various personality types can preemptively catalyze the effectiveness of meetings, differentiating an audience by learning style can do the same.

## Visual

For visual learners, the aesthetic of the meeting space will make or break the experience. In sessions and presentations, these types of learners will focus heavily on the images and the overall look of the material. They need to see something to capture it, process it and retain it.

## Auditory

To enhance the meeting experience for auditory learners, incorporate sound elements in creative, unexpected ways. Music can be woven into the presentation or used as a background element during reflection time. For follow-up material, instead of just sending a copy of the slides or the visual presentation, auditory learners would benefit from sound recordings or podcasts that help them relive the experience.

## Kinesthetic

Some learners are tactile and thrive on dynamic motion as a means of learning. They need hands-on interaction to internalize and remember what is being taught. For kinesthetic learners, newer presentation options like gaming, simulation, and virtual reality (VR) will be powerful tools to incorporate into their experience. While a visual learner will benefit from quality images and graphics, a kinesthetic learner enjoys having a device in their hands during the presentation experience.

## Numeric

For learners with a numeric orientation, appeal to their need for factual representation. Consider replacing bullet points with numbering and integrate data into examples so that every point you want to make has a numeric basis for support. To reach numeric learners, consider increasing the size of numbers in your presentation. Keep all content in order based on dates, sizes, counts and amounts.

## Verbal

Words are important, and for a verbal learner, they are paramount. Capturing this group's attention will hinge on utilizing keywords, distinct word choice, and artistic elements like alliteration as markers to remember main ideas. Typos and grammatical mistakes will be especially jarring to a verbal learner and could be a critical distraction from the meeting itself.

Use second screen technology to profile your audience based on learning style. Then turn around and use the same engagement technology to personalize learning for every participant. Beyond what you do with technology, create new meeting paradigms and design event experiences to incorporate individuality and diversity. Why not unleash the power of psychographics in your next meeting?

# Unique Industry Implications

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While the benefits of employing psychographics at meetings are universal, they do have specific implications in certain industries. We work with many types of businesses, but the three main industries are pharmaceutical companies, financial services firms, and sales organizations in major corporations:

## Pharmaceutical Companies

Medical device, biotechnology and pharmaceutical companies can spend billions of dollars to bring a drug to market. Investigator meetings are a critical component of the clinical trial process. By employing psychographics, meeting organizers can look at personality type and learning style data to profile the ideal site lead. Over time, they can recognize what types of people perform best and most effectively in key roles and then base their recruiting on this data. They can also utilize this information to change meetings in a way that meets the needs of the various learning styles. From specialized recruiting, to better meeting planning, psychographics can be employed in both predictive and prescriptive ways.

## Financial Service Industries

The entire financial services industry must stay within the bounds of regulatory compliance and must navigate the challenges of privacy issues. For them, employing psychographics may be most powerfully utilized in ways that look at risk tolerance for their investors. At a gathering of potential and current investors, use surveys that divide the audience based on their tolerance or aversion to risk, as well as by the types of risk that they are willing to accept in their financial portfolios. While some people may find long-term risk exciting, others may only be able to tolerate it in monthly increments. We can also distinguish where people are willing to place this risk (retirement money or day-to-day investments) and tailor offerings accordingly to act in their best interest.

## Sales Organizations

For organizations with periodic sales meetings, personalized access to information can take a room of 5,000 people and analyze the individuals with pinpoint precision. From this mass collective, identify the most effective salespeople, look at how they interact with information and follow-up over time. Smart meeting professionals will change the way trainings and break-out sessions are conducted. Based on personality and learning style, why not segment the audience and alter the way you disseminate key information. In addition, imagine being able to walk away from a customer-facing event, with insight into the personalities and learning styles of your target audience. Sales teams will increase their close rates and drive more revenue when they understand exactly how to approach each individual with personalized follow up.

## What About Big Brother?

The looming question amidst these obvious benefits is, "How much information is too much?" When does this tool cross the line from intuitive to invasive? If we invite "Big Brother" to our events, will we regret it?

This fear is understandable, but unfounded when you consider the value of providing a personalized experience. If the benefits were unilateral, flowing only in the direction of the meeting planners, then psychographics would have a limited and nefarious lifespan. But, the benefits apply to everyone.

In a mutual relationship between organizers and participants, understanding preferences, personalities, and learning styles facilitates the ability to plan a better meetings and drive better outcomes. From the food served at meals, to the speakers and content sourced for discussion, the entire conference becomes figuratively (and in some cases, literally) more palatable.

Yesterday's meetings operated in a one-size-fits-all paradigm; there was no other way. They offered the blandest options to appease the greatest number of people. With limited access to personalized information, this was the best they could do. This is no longer the case.

One-size-fits-all doesn't actually fit anyone. With psychographics and engagement technology, you can provide a tailored fit and the right-sized experience at meetings of all types. This is not a breach of privacy, it is an intuitive offering that promotes good business and better results.



## Let's Get Personal

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In many ways, we are just beginning to understand the power of personalization and the key role of psychographics. Live meetings offer the perfect environment to experiment with messaging and accommodate preferences with differentiated content. Be part of creating a dynamic shift in the meeting experience.

Personalization catalyzes effectiveness and makes meetings more valuable for everyone involved. Expect to transfer more knowledge, increase satisfaction, change behavior and get greater levels of buy-in than ever before.

By embracing the capabilities of psychographics and the inherent revelations they provide about audience preference, we are choosing to create smarter meetings that can be a perfect fit for every attendee.



## About Educational Measures

Educational Measures is the leading provider of live meeting analytics and engagement technology. Our next-generation EM ARRAY® second screen technology takes ordinary meetings and turns them into dynamic experiences. Live meeting data and analytics drive actionable insight for continual improvement. Our customers increase audience engagement by up to 20X, surprise attendees with more than 25 interactive capabilities and continually improve meeting impact with data driven insight. Educational Measures® and Educational Measures ARRAY® are trademarks of Educational Measures LLC.

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