



Confidence
must be earned

**Amundi
Pioneer**

ASSET MANAGEMENT

Seeing How We Think: Insights for Building Strong Connections

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Agenda

- 1. NBI and the Four Dimensions**
- 2. Working with Thinking Preferences**
- 3. Seeing Your Clients through the NBI**

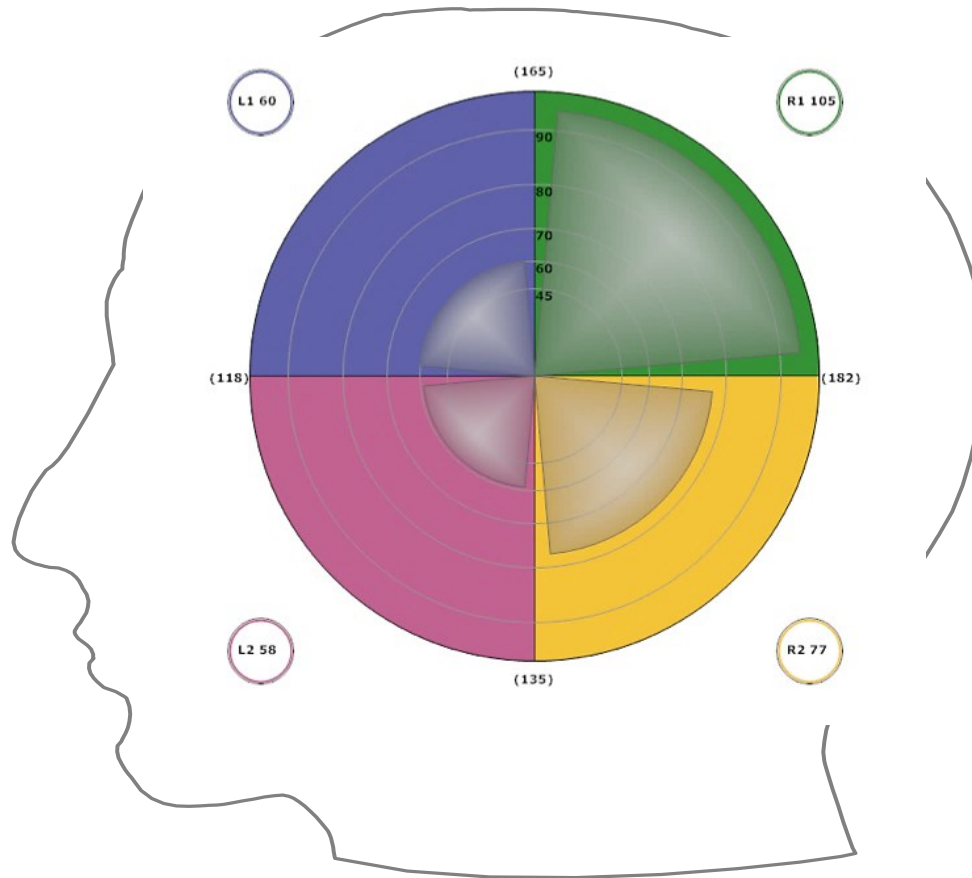
01

NBI™ and the Four Dimensions

“We don’t see things as they are, we see things as we are.”

- Anaïs Nin

NBI™ Model



Left and Right Hemispheres



Present and Past

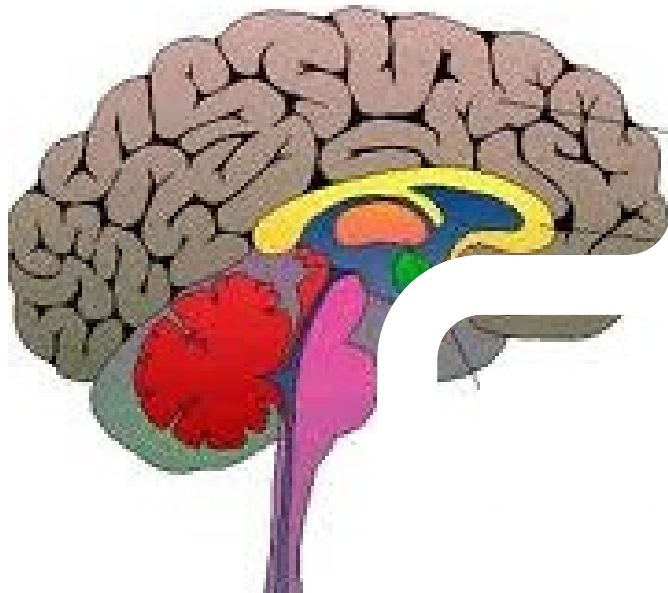
Present and Future

Image: <https://twitter.com/postjoe>

Top and Bottom Processes

Top: *What do I think about the information?*

Action: *Devising plans and carrying them out*



NEOCORTEX

LIMBIC SYSTEM

Sensory Information:
Eyes, skin, nose, ears

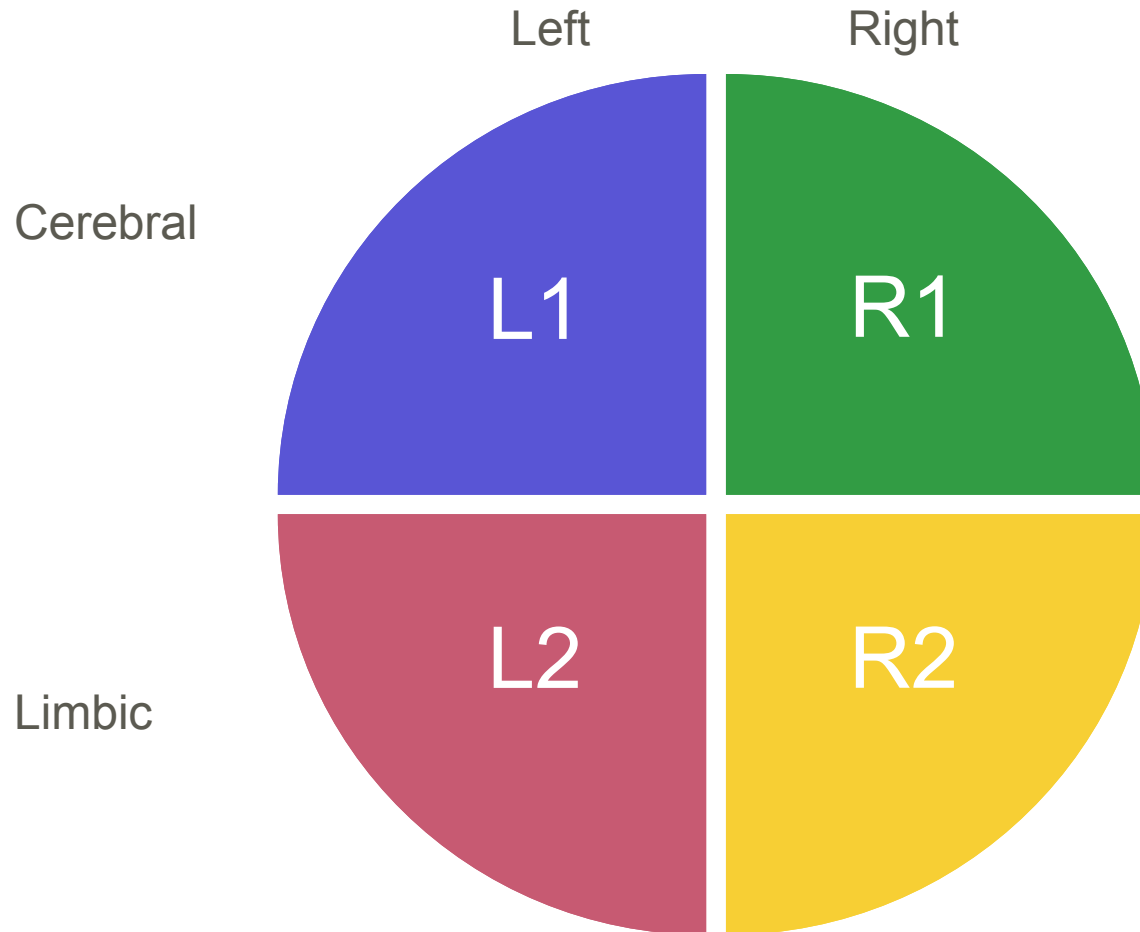
Bottom: *What are the patterns I see, what do they remind me of?*

Action: *Classifying and putting things in order*

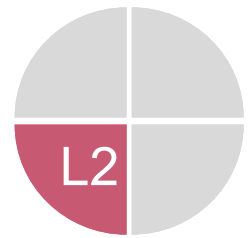
Adapted from NBI™ material by CMS Associates. Image: <https://social-brain.com>

Thinking Preferences

Four Dimensions



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L2: “How?”

Preservers & Organizers

Brain looks for:

- Consistency, details, efficiency, order, reliability, routing

Questions they ask:

- How should it be done?
- How do we start? Then what?
- How will this be implemented?

Known for:

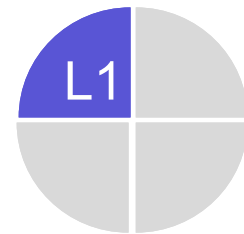
- Being on time
- Sticking with routine
- Planning, structure, controls

Makes decisions by:

- Well-informed with all possible data
- Relying on proven methods
- Thinking through all the details

Hallmarks of L2 Communication

- ☑ Correct
- ☑ Detailed, step-by-step
- ☑ Plans, contingency plans, milestones



L1: “What?”

Analysts & Realists

Brain looks for:

*Focus, Rationale, Logic,
Objectivity, Concrete*

Questions they ask:

What is the point?
What's the goal or objective?
What's the bottom line?

Makes decisions by:

Comparing against the plan
or goal
Relying on data and facts
Testing logic

Known for:

Liking to be right
Wanting things to be clear

Hallmarks of L1 Communication:

Coherent, probe for accuracy, cut to the chase



R2: “Who?”

Empathizers & Socializers

Brain looks for: *Social connections, shared information, harmony, understanding, support*

Questions they ask:

Who will be involved?

Who will be affected?

How do you feel about this?



Makes decisions by:

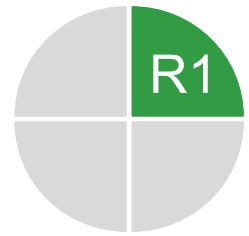
- Considering best interests of people involved
- Based on what feels right
- Agreement or checking in first before action

Hallmarks of R2 Communication:

- Encouraging
- Frequent
- Emotionally expressive

Known for:

- Diplomacy
- Comfortable with multiple realities
- Connecting well



R1: “Why?”

Strategists and Imagineers

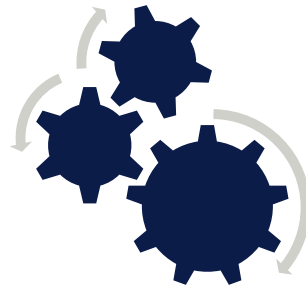
Brain looks for: *Possibilities, opportunities, connections to big picture*

Questions they ask:

Why does this matter?

Why am I doing this?

Why don't we try...



Makes decisions by:

- Thinking about connections and implications
- Imagining what could be in the future
- Challenging status quo

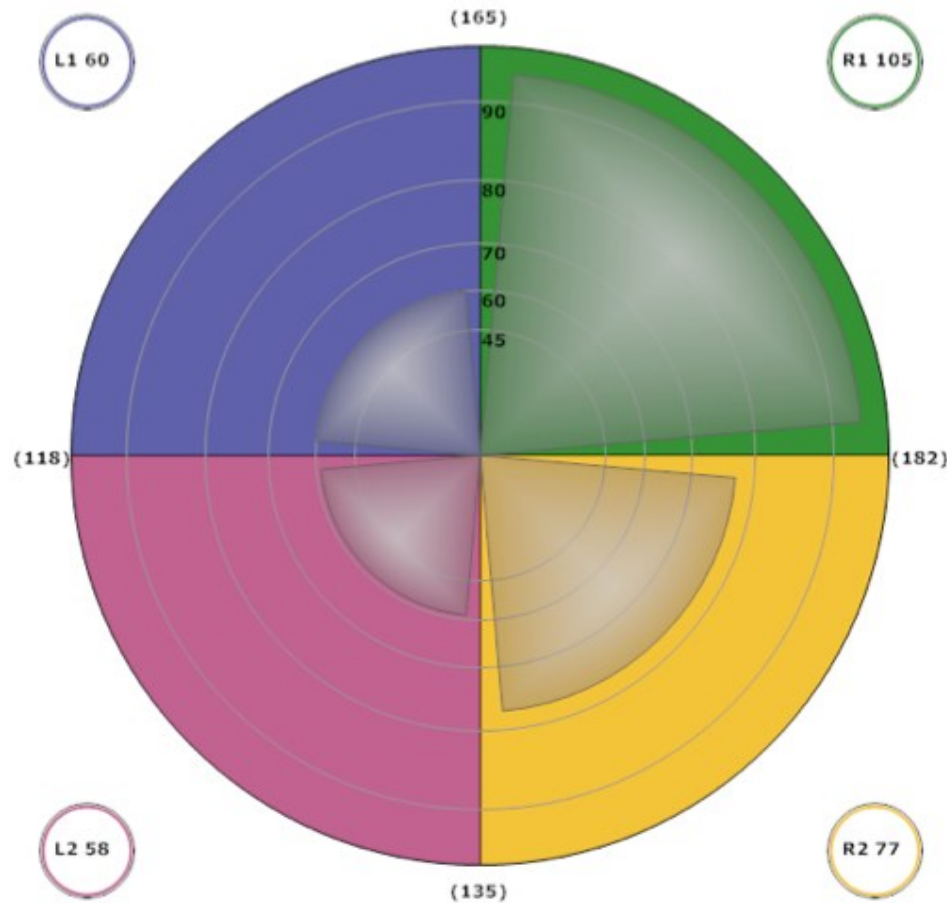
Hallmarks of R1 Communication:

- Many ideas and possibilities
- Conceptual versus details/practical

Known for:

- Innovative ways of doing things
- Taking risks, experimentation
- Preferring change to routine

“Map” of Thinking Processes



L1 “What?”

Objective, facts,
bottom line, logic

L2 “How?”

Specifics, details,
plan, timeline

R1 “Why?”

Big picture, vision, future, possibilities

R2 “Who?”

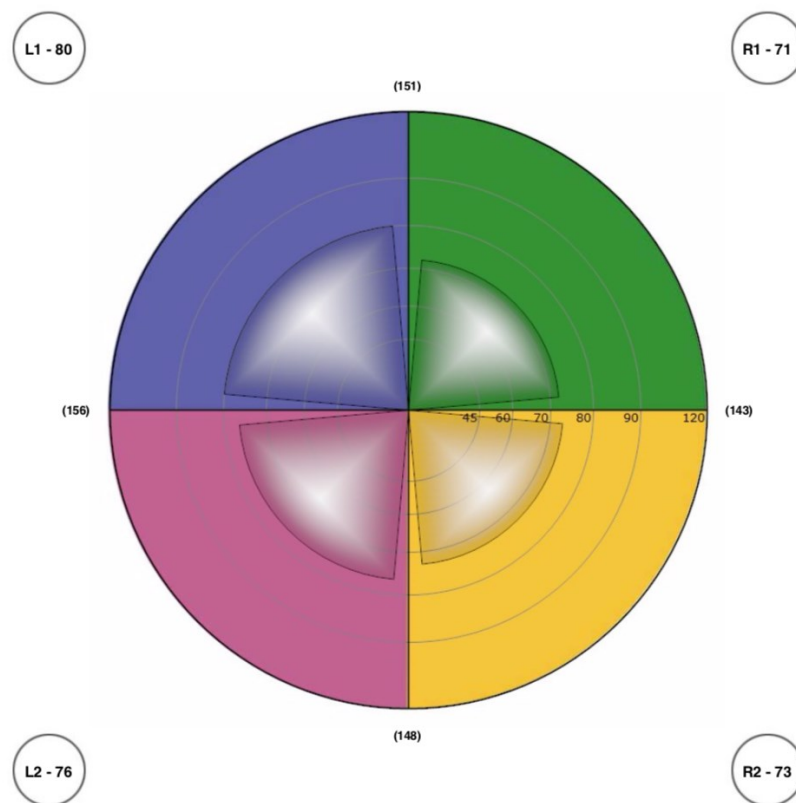
Relationships,
support, harmony

Let's Look at Your Profiles

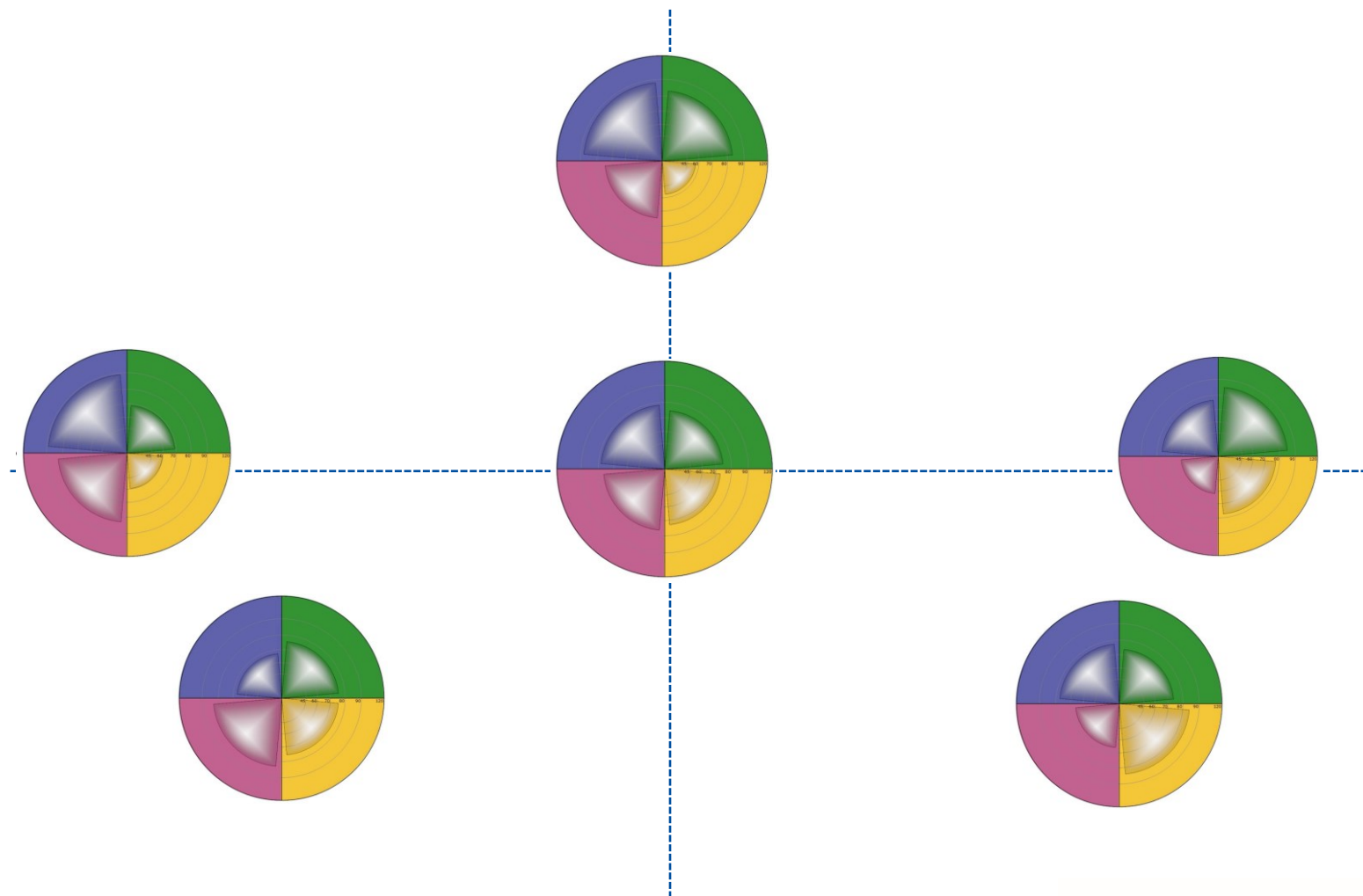
Read your profile on page 5.

- >95 = very strong preference, “hard to hide”
- 80-94 = strong preference, used most of the time
- 65-79 = flexible, will use preference when needed
- <65 = tend to avoid this style if possible

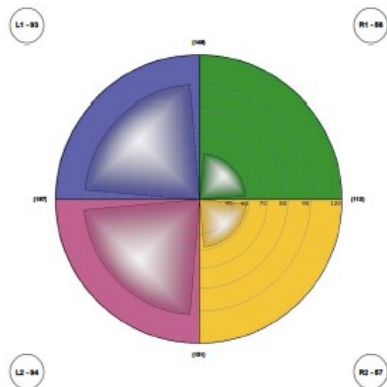
Group Average (n=47)



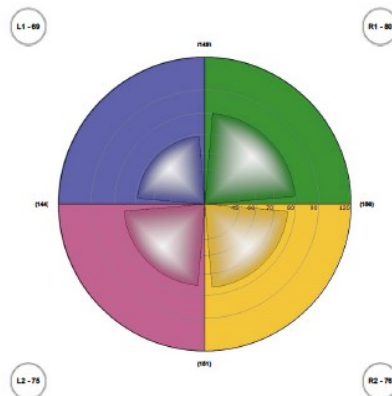
Who's in the Room



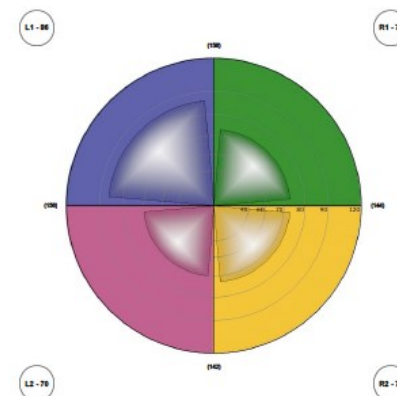
Dominance Statistics



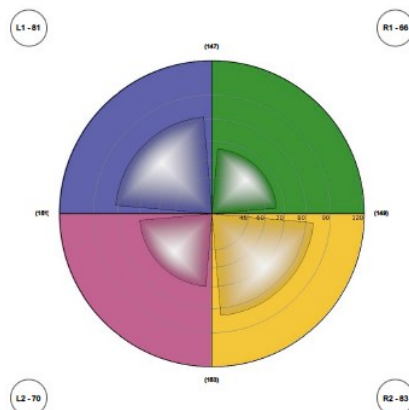
80%:
2 dominant quadrants, most
often adjacent



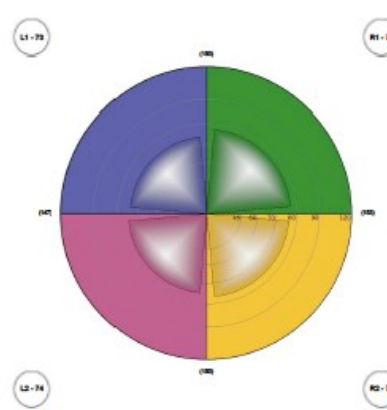
10%:
3 dominant quadrants



7%:
1 dominant quadrant



5%:
Diagonal dominance



3%:
equal dominance

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02

Working with Thinking Preferences

Connecting to Your Audience

Business Case

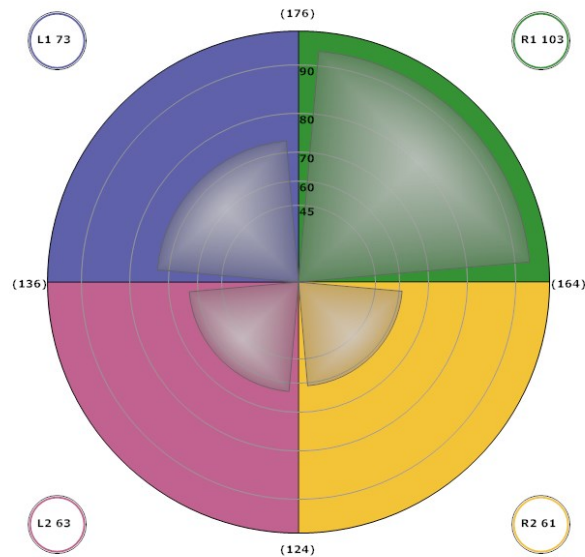
Enable your patients to reach new heights with Zenebrel.



©2018 CMS Associates. Image: <http://www.projectswole.com/conditioning/mountain-biking-is-good-for-you/>

Connecting to Your Audience

Business Case



Pharmaceutical Sales Team
Marketing Pitch

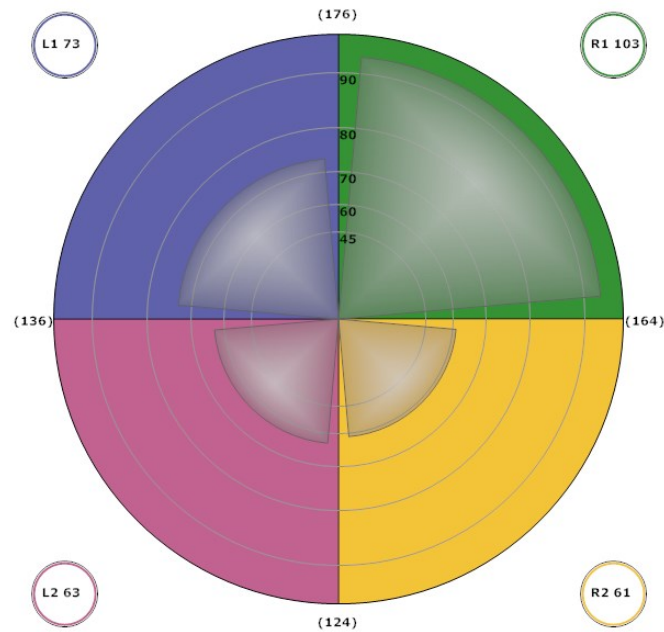


Enable your patients to reach new heights
with Zenebrel.

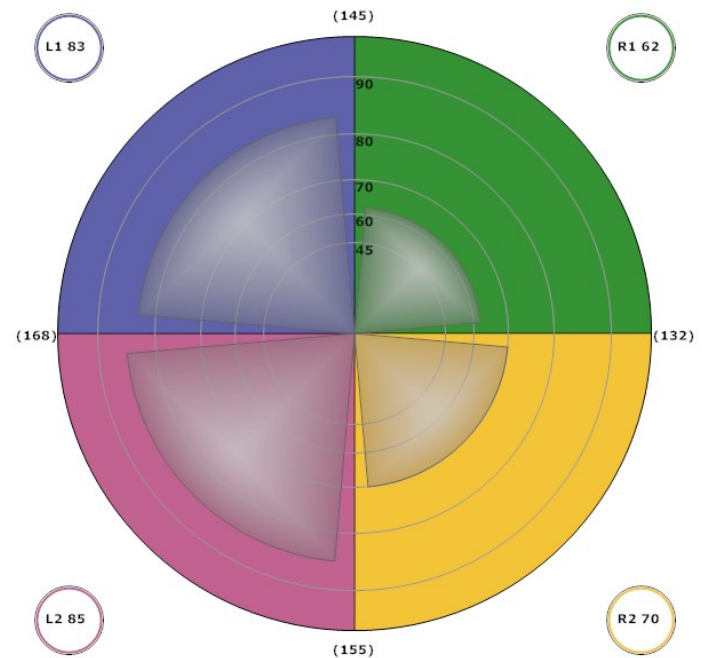
©2018 CMS Associates. Image: <http://www.projectswole.com/conditioning/mountain-biking-is-good-for-you/>

Connecting to Your Audience

Business Case



Pharmaceutical Marketing Pitch



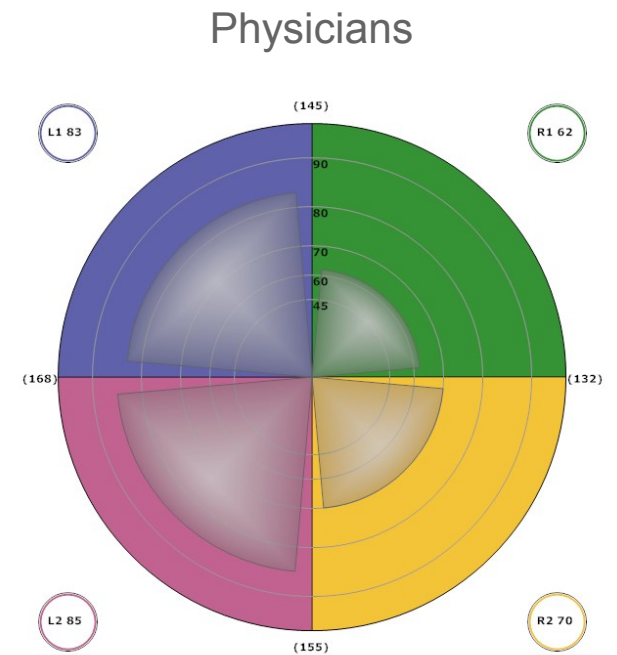
Physicians

Connecting to Your Audience

Business Case



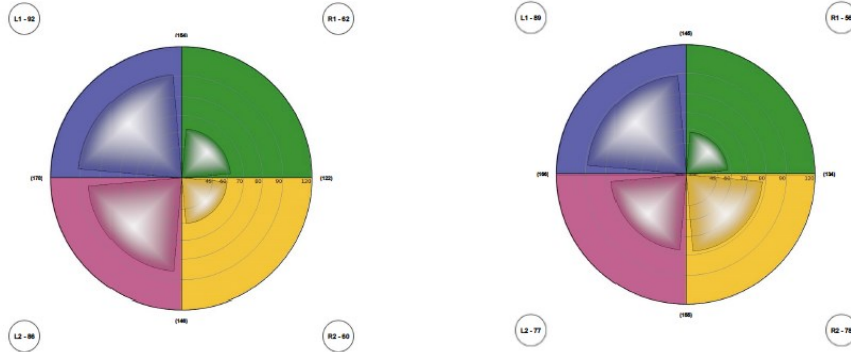
Target inflamed joints for immediate relief with Zenebrel.



©2018 CMS Associates. Image: [https://fthmb.tqn.com/1Jpu8oFZzM9UZfOzrWNgAnAi6E=/3904x4492/filters:no_upscale\(\)/knee-anatomy--artwork-452427829-599d8b9b22fa3a0011f2030d.jpg](https://fthmb.tqn.com/1Jpu8oFZzM9UZfOzrWNgAnAi6E=/3904x4492/filters:no_upscale()/knee-anatomy--artwork-452427829-599d8b9b22fa3a0011f2030d.jpg)

Connecting to Your Audience

Understanding Energy and Potential Blind Spots



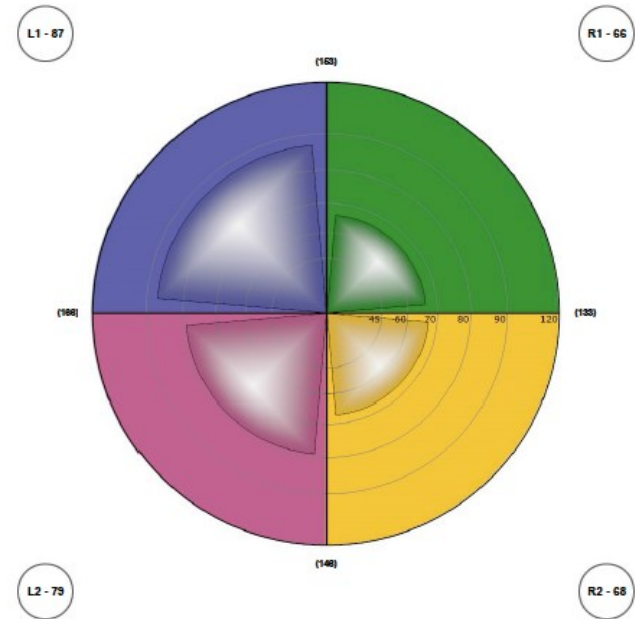
Head FA

Head FA

Administrator

Client Associate

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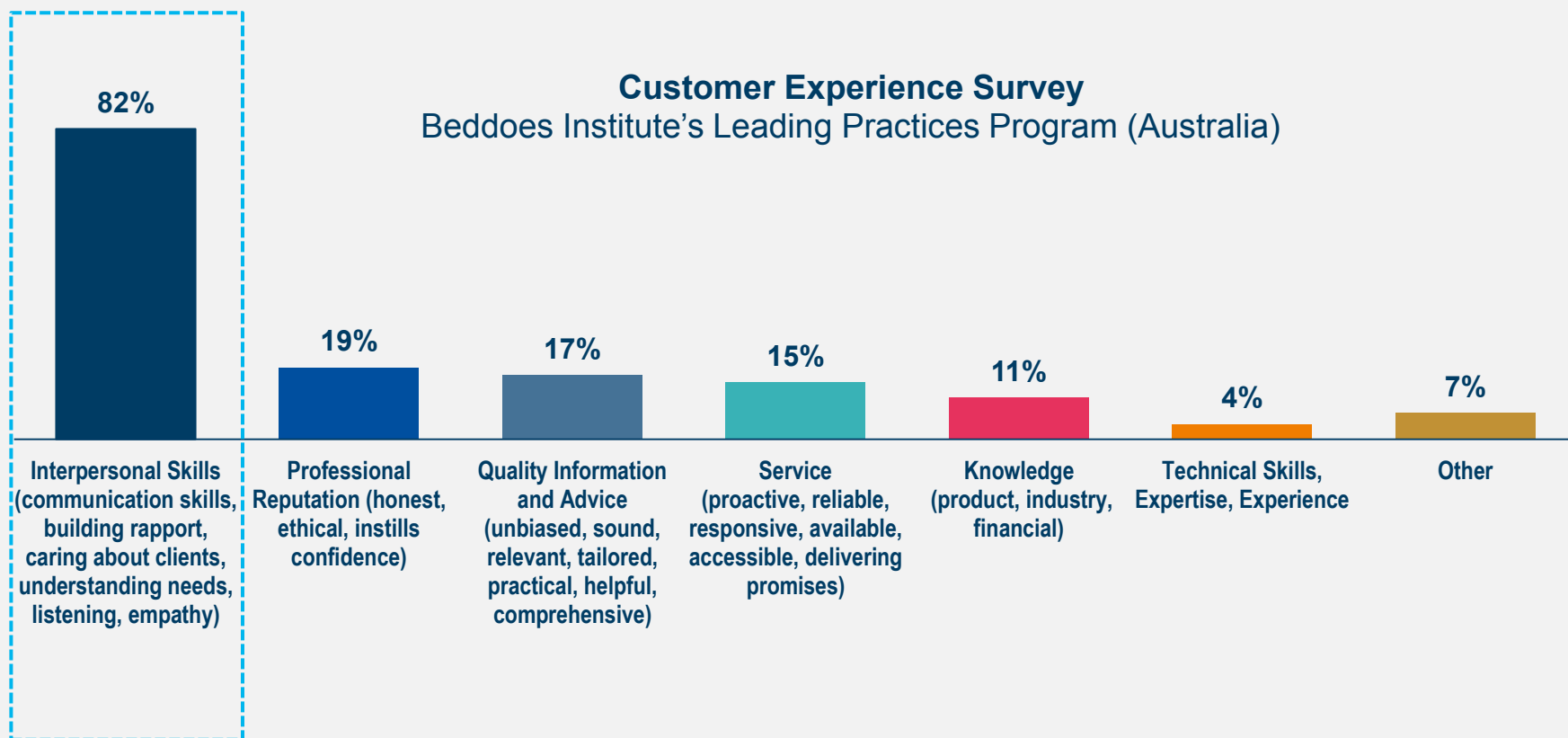


Composite Team Profile

03

Seeing Your Client Cases through the NBI

What Qualities of Your Advisor are Most Important to You?

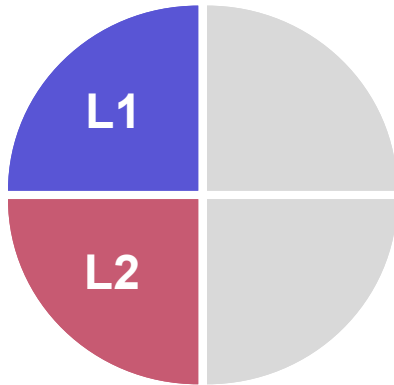


Source: The Trusted Adviser: Honouring the Client at Every Turn." Association of Financial Advisors, May 2013.

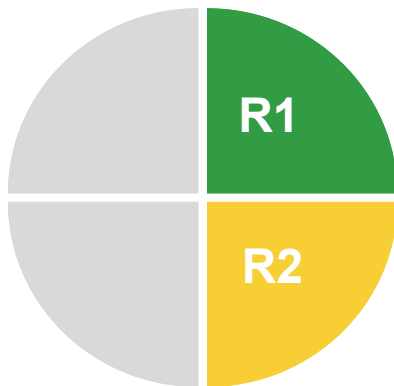
Case of “Nancy”

Client Case

Guess about Richard's Thinking Style?

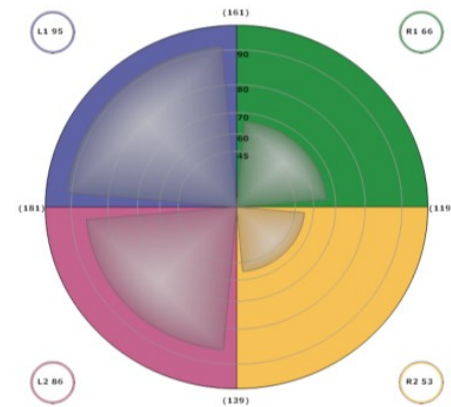


Guess about Nancy's Thinking Style?

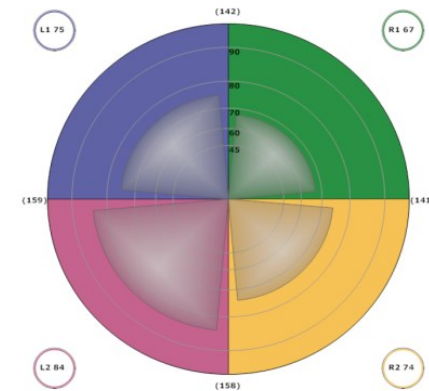


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Financial Advisor



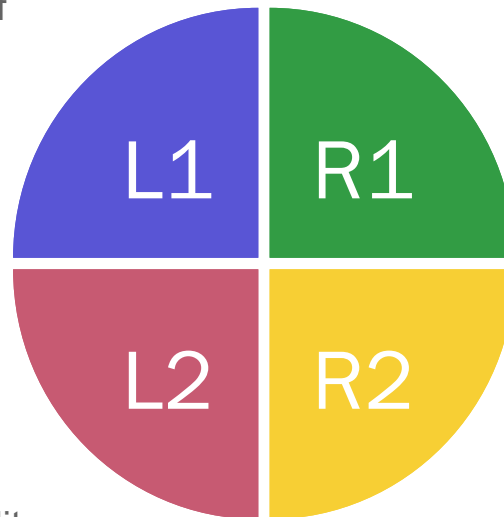
Assistant



Listening Checklist

Slow Down and Pay Attention Anew: Be an Anthropologist

- Starts with review of goals or deliverables
- Asks for “right answers” or proof
- Debate, talking over
- Focuses on actions to take



- Non-business topics at the start or throughout, changes topics
- “What if...” questions
- Interest in exploring options vs. making definitive decision

- Focus on steps and sequence
- Notices small details, probes
- Concerned about unpredictability
- Control, risk management
- Focuses on next steps and timelines

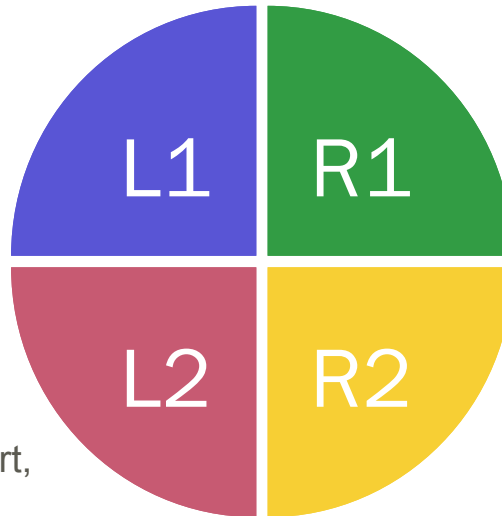
- Eye contact
- Starts with personal updates
- May not argue or challenge
- Facial expressions, body language as means of communication
- Talks in terms of comfort and discomfort

Adapted from NBI™ material by CMS Associates

Working and Communicating with the Quadrants

Be Clear and Convincing

- Define concrete targets and goals
- Back up points with facts & data
- Expect debate & engage in it
- Stay focused
- Keep small talk to minimum



Stay Flexible. Discuss What's Possible

- Anticipate variety of options, help prioritize
- Allow for calculated risks
- Diverge, then narrow new ideas

Be Practical and Organized

- Provide instruction about the start, not just the end goal
- Create steps, timelines and milestones and adhere to them
- Establish routines

Be Personal and Supportive

- Lead with interest in other person
- Notice and ask about visual cues
- Provide positive feedback
- Recognize some decisions are based on values, not logic

Adapted from NBI™ material by CMS Associates

Resources

- *Top Brain, Bottom Brain: Surprising Insights Into How You Think*. Kosslyn, S. and Miller, G. (2013) New York: Simon & Schuster
- *Mindsight: The New Science of Personal Transformation*. Siegel, D., M.D. (2010) New York: Bantam Books
- *Whole Brain Business Book, 2nd Ed.* Herrmann, N. (2015) New York: McGraw Hill
- *The Tell-Tale Brain: A Neuroscientist's Quest For What Makes Us Human*. Ramachandran, V. S. (2011) New York: W. W. Norton & Company
- *Your Brain at Work*. Rock, D. (2009) New York: Harper Collins
- Neethling Brain Instrument (www.wholebrainthinking.com/au)

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