

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 and/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