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00:07

JIM: Welcome and today we’ve got a very special guest, Stu Schlackman, who I met at an international business conference that I attend, and he was one of the keynote speakers. He’s an author of the book the Four People You Should Know. I will tell you after reading that book I actually shared it with everybody in my office, and while it’s geared toward having a relationship with the people that you’re selling to for sales folks, it actually was something that we used here in the office. I had everybody in my office read it, and there was some underlying tensions between different people in the office. Having read that book gave everybody a deeper understanding of where people were coming from and didn’t necessarily take those contentious moments personally. It was better to understand their personality and help them maybe get past some things that they were taking personally. It really had a big impact, and I think this is going to help anybody out, whether you’re looking to advance in the job you’re at, you’re looking to do better in school, you’re looking to do better in your career. It’s just going to – the communication skills that you can learn can help you no matter what you goals might be but just help you with your relationship.

Stu, I really want to welcome you. I’ve been looking forward to this interview ever since we went through that with my business.

1:25

STU: Well, I thank you. I appreciate it.

1:28

JIM: What prompted you to write the book, the Four People You Should Know?

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STU: Well, back about 14 years ago I developed this tool and a friend of mine said you should write a book on it. While we were actually going on vacation to Italy I started writing the book. My friend is a green personality; I’m an orange. He’s detailed; I’m big picture. I said what do I write? He said write up everything you do in your seminar, so I tackled it, and I was done four weeks later. It took him about four months to edit it, and that’s because he has a knack for detail. The book came out in 2007, so it’s been out, yeah, just exactly this month on Valentine’s Day 13 years.

2:20

JIM: That’s awesome. Let’s talk about that. Talk about the four personality styles, so what are those colors? What are those personality styles?

2:29

STU: It’s orange, green, gold, and blue. You have two that are left-brained and two that are right-brained. Your greens and golds are left-brain people that are more task-focused and objective. Your blues and oranges are right-brain people. They’re more relationship-focused and subjective, so they look at the intangibles versus gold and green looking at the tangibles. Greens are your analytics. They’re very logical in detail and skeptical. Your golds are very organized, methodical. They’re very into schedules, agendas, and being punctual. Your oranges are highly competitive, outgoing, energetic, persuasive, and big picture. They’re like your expressives. Then the blues are the amiables or the relationship person. They’re very into creativity, empathy, feelings, recognition, so four very distinct personalities. There’s a lot of tools out there that are similar, but what I did was focus this on communication, building value, teamwork, and also for the world of selling.

4:02

JIM: When you have people determine what color they are, is it just one color that each person falls into or do they have the traits across the board do you find?

4:13

STU: That’s a great question, Jim. Everybody has all four colors. The highest score is your key color. That’s who you are and even if your secondary color is one point away, that first one is really who you are. The second one has some influence. The third one has no influence, and the lowest score is not your weakness but it's what you’re least interested in. For instance, I’m an orange, so very outgoing, competitive, big picture, persuasive. My secondary is blue, which is pretty high, so feelings, recognition, creativity. I am very low gold, so it’s not that I’m not organized, and I don’t plan; it’s that I don’t care about it. There are people that have four very close scores, which is a good thing, but they could see all four personalities pretty equally. Then there are those like me that are very widely spread apart. Since I know that, I know how to deal with my lower scores, because I know what a gold or green wants.

5:29

JIM: If you’re building a team, would it be good that everybody have the same colors or is it a stronger team when you have somebody who has the strengths across all four colors?

5:43

STU: You are much better off having a team with all four colors because this way you get the strengths of all four colors and you get the perspective of the four. For instance, if you had just oranges on your team you would have no details; it would be like herding cats. If you had all gold, they’d all be fighting for control. If you had nothing but blues, they’d be doing group hugs every five minutes. If it was nothing but greens, they would never make a decision. They’d be fighting and debating, questioning the entire time. Having all four colors gives you four perspectives and a more powerful team, especially when they understand and value the strengths of each of the colors.

6:34

JIM: With each of the colors, and I think this is something no matter who’s listening today. First of all, if you’re able to determine the colors, and I know you’ve got some tests that people can go through. It’s a real simple, easy thing. It’s not a right or wrong; it’s just telling how you feel about it. You can come up with these answers pretty quickly, so once you know what everybody’s color is, how do people prefer to communicate based on the color?

7:00

STU: That’s a good question, and I have a skill card that goes along with that. Basically, you will see that there are two colors that tend to do the talking. Those are your golds, left-brain, and oranges that are right-brain. Golds are very formal, balanced. They like schedules and agendas. They are controlled when they talk. They are confident when they talk, and they talk with facts, details, and logic being left-brained. Oranges, on the other hand, like to do the talking. They talk with stories and analogies, and they focus on the big picture. They don’t care for details. They’re also fast-paced. They’re also very persuasive and energetic. Those are your two direct style communicators. The indirect styles are your blues and your greens. They tend to ask questions. They are not aggressive. Greens are very analytical and calm, so they’ll ask questions in regard to information, and they’re skeptics. They will keep on asking questions to dig deeper. Blues, on the other hand, also ask questions, but they ask questions about the person, about the organization, about family, friends. They’re more relationship-oriented. Their questioning is a little different, and they’re more laid back than your golds and your oranges.

8:50

JIM: Talk a little bit – I know you’ve already touched upon the value that each of them kind of have, but what about the decisions. How do they make decisions? What’s the difference between the different colors?

9:02

STU: Well, you’ll see that golds and oranges are decisive because if you look at the personality tool, Myers & Briggs, you’ll see that gold is what we call a sensory judger and orange is a sensory perceiver. Sensory means they come to conclusions by their five senses; smell, touch, taste, feel, and see. Therefore, they’re limited. Gold will make a decision by a timeframe, and it’ll be quick. Oranges, by nature, are impulsive, so they make immediate decisions because they’re very aggressive and impulsive. You will see that greens are the slowest because they have to have all the information and blues are also slow in making decisions because they worry about risk. They usually make a decision based on consensus of how everybody else feels. Also, greens and blues are what we call intuitives. Greens are intuitive thinkers. Blues are intuitive feelers. Intuition is a sixth sense. Therefore, they’re looking for other things to make a decision on that your golds and oranges don’t see because they’re intuitive by nature. They will take longer to make a decision, especially if a personality style is green backed up by blue or blue backed up by green they will take forever to make a decision. You could see that when it comes to in the world of selling, you never want to push a blue or a green but with a gold or an orange you could say are you ready to move forward and they will.

10:51

JIM: Really, too, in business if you have a blue or a green, if they make a decision to work with you, you’re probably not going to – they’re probably never going to second guess because they made a complete, informed decision before they move forward, but the other ones – they’ll come to you in a heartbeat and leave in a heartbeat, right?

11:11

STU: That’s a good point, yeah. You will find that if golds don’t see what they like, they will leave in a heartbeat. Oranges, on the other hand, love the relationship and if it’s a good relationship they’ll stay around forever. If the relationship is bad, yes they’ll leave. Where blues do not like change, so if they made that decision, and there’s high trust, they will stay with you forever. Greens, on the other hand, are very independent, and if they don’t like something or there’s something better out there, they potentially could change also. Yeah, you’ll see that your blues – the right-brain people tend to focus on the relationship and service, and if it’s good then they stay around forever. Where the left-brain people are more objective, and they look for the tangibles.

12:11

JIM: Well, I know I tested high as an orange and as an entrepreneur that owns my own business, I was probably the worst hirer and manager of people, and I remember we had another guest on that she talked about how to hire people and work together and build teams. She talked about folks in my position are the worst people for hiring because what we do is, it’s like with our clients. We’ll talk about the best opportunities and here’s why I think you should do this, and if they decide to go with you, okay great, now I’m onto the next. While it was the same thing in the hiring process, I talked to them about what a great opportunity, how much fun it is to come to work, and this will be the greatest job since sliced bread. You hire them and then it’s like okay here’s your job, figure it out. I’m not the next thing, so – I definitely have seen that. Now what I’ve learned is to take those different personality types. They don’t let me anywhere near a job interview, and they only introduce me to the people we’re hiring. I pretty much keep my nose out of it and let my other people take care of that. Let’s take a short break. When we come back, let’s talk about that over time and what happens to people as they get older. Does that make their colors change or their personalities change, so please stay tuned.

[BREAK]

13:38

JIM: Welcome back as we continue to visit with Stu Schlackman. He’s the author of the Four People You Should Know. Before we move on, Stu, how do people get a copy of this book?

13:47

STU: Well, you can go to my website and buy it at stuschlackman.com where you could also take the personality assessment. That’s also available. It’s a 10 question assessment that you could easily take online. It’s at no cost, so you can do that. You can also buy the book on Amazon. It’s there under Kindle, it’s under paperback, so either one.

14:13

JIM: You also – and I look at this. You do speaking around the country. I don’t know if you’ve been internationally speaking as well, but if someone out there listening wants to bring you in for their group or whatever that’s available as well, right?

14:30

STU: Absolutely. I’ve actually spoken over in Singapore to five insurance companies, so that was a great experience. I’ve been to Scotland, Ireland, Canada, and several other countries also.

14:45

JIM: You know, it’s interesting because I think families can benefit from this, organizations, teams, whatever you have. When you have more than one person dealing with things, having that understanding of their personality type in a way they want to be communicated with can certainly make much better results. I know I was – I listened to a session. It wasn’t yours, but they were talking about the different personality types. One of the kids they thought was almost suicidal. They were very regimented, everything needs to be in order, and that type of thing where the rest of the family was like the oranges. They just figured everything out on the fly, and could make a decision to change. For example, they would talk about hey we’re going to go to Domino’s Pizza tonight for dinner and they’re all ready to go to Dominos and then last minute they decide to go to Godfather’s Pizza. Well that just throws the one in a tizzy, and the whole family was that way, except for that one individual. They thought he was suicidal, well here his life was complete chaos. He couldn’t handle these last-minute changes, so even in a family situation understanding this could really be beneficial. That brings me to my next question, Stu. If as we get older and mature, does our situation change or our personalities or are we pretty much locked in and loaded for our lifetime?

16:16

STU: We are pretty much locked in for our lifetime. If you were born an orange, you’re going to leave an orange. The kid you were mentioning was probably a gold because why? Golds do not like change. They like consistency, so do blues. Greens and oranges love change. Now, there are factors in life that modify our personality style. For instance, where in the country you grew up. Did you grow up in a strict house or a very lax house? I’m an orange, like you, Jim. I grew up in a very strict house, so when I was in high school you would’ve thought I was a gold. When I got to college, I mean I had my freedom. I went nuts. All of the sudden my real orange came out. As we get older, change become disruptive, so you think about someone who loves change and loves to just free-wheel it in their 30s. well, as you get married and you have a family, you have kids, you have grandkids, you get older you want consistency. You want predictability, and you get into your 60s or 70s change is extremely disruptive. I saw that, even with my father, who was a gold but my father played golf every Monday, Wednesday, and Friday at 8:36 a.m.; never c hanged. He’d be on the phone with me and my brother and hang up and my brother Scott would say, well did he have to take out the garbage or get the mail? We’ll see that as you get older people slow down and if there’s a lot of change, that could be really distracting. Also, a change in your career. Typically, oranges are late, but for what I do for a living as a speaker and a trainer, I am always early. There’s no way I’m going to be late. Your career also kind of modifies behavior on your personality style also. Those are some factors that will definitely play in as we get older, as we change careers, as we have kids, things like that, going back to school, going from a job where you’re working in a big organization to becoming an entrepreneur. That makes a big change also.

18:53

JIM: In your tool, what do the four scores mean?

18:59

STU: You’ll have a score. A perfect score is 40. It’s a 10-question quiz where you write each question 4, 3, 2, 1; 4 is most like you, then 3, 2, and 1 is least like you. A perfect score is 40 and the minimal score is 10. I’ve only had one person in 15 years come across with four 25s. That means that they’re all four personality styles. They don’t see any different. I’ve had some that were only one to two points apart. Then there’s someone like me who’s a 37 orange and a 15 gold. That means that I have to work extra hard to relate to what’s on the mind of a gold, but it’s not hard to do. It’s just that I need to be aware and cognizant of who I’m dealing with. It’s easier to work with others when you scores are close. It’s harder when the scores are apart, but it’s easily doable. You will see that your primary score or your top score is your number one personality. The second one has a lot to do with it also. For instance, I’m orange-blue. I’m totally right-brained, so rules aren’t important to me because I’m low gold. My wife is orange-gold. She’s a stickler for rules. If I start picking up my phone in the car, she’ll slap it out of my hand where it doesn’t even bother me. You see where the first two scores say a lot about the person. If you’re gold and green, you’re totally left-brained, which means you’re very good at problem solving, facts and figures. You’ll see a lot of CPAs, doctors, lawyers, IT people that are in that category. Then in the world of sales you’ll see a lot of orange and blue, especially in the financial services industry.

21:00

JIM: For our audience, most of our audience have gotten this program from their advisors or professional insurance agents. For the people listening here, a lot of times, like you just mentioned husband and wives are opposite. I know when I sit down with a client there’s usually one that’s really interested and another one that got dragged there. What advice would you have for a client because financial planning and insurance planning is so important and not enough people are engaged in that process. I think a lot of times they get upset because they’re not – expectations aren’t being met because I think the communication kind of broke down. What can somebody do if they’re going through something like financial planning and they’re listening to their advisor and it’s just not clicking. Is there something they can do to understand the personality types and how to maybe bridge that communication gap?

22:00

STU: Yes. Here’s one thing to realize. Women are different from men. Of course we know that, but women are wired for empathy, relationships. Men are wired for building systems, which is task-oriented, and that’s out of Daniel Pink’s book, A Whole New Mind. Men are focused on bottom-line results. Women are more interested in security and safety. Also, you’ll see that depending on their colors, men are also typically more aggressive than women, but you’ll see your oranges. The best question for a couple to ask themselves before they see an advisor is when it comes to financial planning what’s your top priority or what’s most important to you. For women a lot of times it will be safety and security. For men, it will be building a strong nest egg and not losing money. It might be a little bit more aggressive than the woman. For a financial planner, that’s the best question they could ask a couple is when it comes to financial planning what are your top priorities. What’s most important to you. That will also give you an understanding of their personality style. What you’ll see – yeah go ahead –

23:29

JIM: No, you go ahead.

23:30

STU: What you’ll see is that – it’s kind of funny. I’ll say this – when it comes to personality, opposites attract. Then they get married and then they attack. It’s funny because my wife and I are both orange but the difference is she is more – has more empathy than I do, and so that’s the difference. We also have the same view on a lot of things, but we talk it through.

23:59

JIM: If you’re – one thing I would think from hearing what you’re saying is if you’re a couple going into see an advisor and you have – I’ve found too – now this isn’t always the case and it seems to be getting less and less, but there’s usually one spouse that is dominant in the conversation and the advisor will have a tendency to focus on the person that’s asking all the questions and that’s interacting. If you’re someone that doesn’t like to put your foot forward, what would you suggest because like you said they’re opposites. The husband might have a goal that’s completely different than the wife, and the wife can’t sleep at night knowing that the husband’s trying to roll the dice, maybe buying penny stocks. What advice would you give to someone who doesn’t normally like to speak up to get that attention of that advisor, so they’re both included in the plan?

25:01

STU: Before the meeting, I think that both spouses need to come to agreement that they’re going to equally ask questions because here’s another thing – the golds and the oranges are aggressive personalities. They will ask the questions where your blues and greens are more passive personalities. If you have a blue wife, she’s going to be very passive compared to a gold or orange husband. Now, if the husband is blue or green then you’ll probably see the wife speak up a little more if she’s gold or orange. Both husband and wife need to set expectations with each other on who’s going to ask what questions and when the advisor asks somebody for feedback that they honestly answer them.

25:57

JIM: I know I’ve seen a statistic, and I’ve had guests share this statistic that it’s an amazing number of clients where one spouse dies and the widower will leave that advisor because – it’s amazing. A lot of times it’s the guys that die first and then the wives have already gone through losing their life partner and now they’re transitioning a lifetime advisor because they never clicked, they weren’t in that meeting, and I’ve got to believe there’s a cost to be paid when you switch horses in the middle of the river.

26:38

STU: I agree.

26:38

JIM: The thing is, and that’s where I look at both spouses should be well-engaged with their advisors because those decisions that are being made are based on the input that they’re getting. My advice is I would definitely speak up. I love your advice about beforehand having the couple come to that meeting with a game plan, so they both get something out of it, and they both get their needs met.

27:03

STU: Absolutely.

27:07

JIM: Any final thoughts, Stu?

27:06

STU: You know, another point, Jim is value. Where blues value an advisor, a strong relationship that is based on trust, integrity, and transparency. Greens they want an expert that they’re dealing with. Oranges, like an advisor that’s easy to contact that’s very relational and is always there for them with good advice. The golds like to do business with a company that has a great track record and they like to see good results, and an advisor that is timely, committed, and follows through. That’s what the four personalities value. Value is a little different, so that’s why the best question to ask is when it comes to working with an advisor what’s most important to you and that will tell you something about their personality style.

28:07

JIM: You know, Stu, I really appreciate you sharing one more time that book that you authored.

28:13

STU: Yep, the Four People You Should Know, and it’s on my website stuschlackman.com and it’s on Amazon. You can also take the personality assessment on my website.

28:24

JIM: Stu, I really appreciate you sharing. Hopefully, I know most of the time you’re talking to advisors to teach them to communicate better, but to have communication it’s a two-way street. For the people listening, learning how to communicate with your advisor, so that you get out of your advisor what you’re expecting, it’s okay to say time out, hey this is something that’s important for me to talk about because if you don’t communicate with them they’re not mind readers. Make sure you take that time and work together as a team as a husband and wife to make sure you get the bet results. Thanks again for joining us.

29:06

STU: Thank you, and I really appreciate it.

29:09

JIM: Alright, I think that was awesome.

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