Introducing **MBTI**® **STEP II**™ Results

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INTRODUCTION

Welcome to the *Introducing MBTI*® *Step II*™ *Results* workshop.

We have created this Step II workshop with a twofold purpose in mind:

- To increase your understanding and appreciation of Myers-Briggs® personality type through use of both the Step I™ and Step II assessments
- To enhance your effectiveness in helping your clients apply type knowledge

The introductory workshop can stand on its own or be used with the booklet *Understanding Your MBTI*® *Step II*™ *Results: A Step-by-Step Guide to Your Unique Expression of Type.* The workshop format helps participants complete the booklet activities and process the information in a group setting.

This Introduction will help you decide whether the MBTI Step II assessment is appropriate for your clients, determine whether your professional skills and knowledge are up to speed, and prepare for the workshop. It includes contracting considerations and worksheets to help you prepare for the training sessions and Step II workshop guidelines, including suggestions for language to use and how to form groups.

Objectives for This Workshop

Upon completion of this workshop, participants will be able to

- Comprehend the basics of Step I type
- Identify the relationship between the Step I and Step II assessments
- Read their results, including the meaning of scores and their placement into categories
- Understand each facet and its poles

Workshop Materials

This workshop kit contains the following materials:

Facilitator's Notes

This Facilitator's Notes PDF file contains instructions and resources to help you prepare to deliver the workshop, a program agenda, and lecture script and instructions.

Facilitator Worksheets

Facilitator worksheets are provided in a PDF file and can be printed as needed for your workshop preparation.

- Type Table Worksheet
- Facet Tally Worksheet
- Decision Styles Tally Worksheet

Training Slides

The PowerPoint training slides are ready for you to use as they are or to incorporate into an existing program.

Participant Worksheets

The following participant worksheets are provided in a PDF file and can be printed as needed for your workshop.

- Descriptions of the Extraversion−Introversion Facets Worksheet
- Descriptions of the Sensing−Intuition Facets Worksheet
- Descriptions of the Thinking−Feeling Facets Worksheet
- Descriptions of the Judging−Perceiving Facets Worksheet
- Handling Introductions Worksheet
- Concrete−Abstract Facet Activity Worksheet
- Decision-Making Case Study Worksheet
- Decision-Making Styles Summary Worksheet
- Decision-Making Questions Worksheet
- Dealing with Deadlines: The Early Starting–Pressure-Prompted Facet Worksheet
- Reflection Worksheet

Additional Materials

You will need to purchase an MBTI Step II assessment administration and generate an MBTI® Step II™ Interpretive Report for each workshop participant. If you choose to use the optional *Understanding Your MBTI® Step II™ Results* booklet, you will need to purchase a copy for each participant.

Background Information About the MBTI® Assessment

Use the following information as needed to help your clients understand the MBTI assessment and its potential applications.

Global Use

The MBTI assessment is the most widely used personality tool in the world. More than 2 million people worldwide take it each year. The assessment is used by most of the Fortune 100 companies and many multinational, government, and educational organizations. It has been translated into 30+ languages for use in 70+ countries. You can access the latest information about how the assessment is used globally here.

Origins of the Assessment

The Myers-Briggs Type Indicator® (MBTI®) assessment is a self-report questionnaire designed to make Carl Jung's theory of personality types understandable and useful in everyday life. The authors of the MBTI assessment, Katharine Cook Briggs and her daughter, Isabel Briggs Myers, were keen observers of personality differences. They studied and built on the ideas of Carl Jung and applied them to understanding the people around them. Myers developed the MBTI Step I assessment to give people everywhere access to the benefits she found in knowing about personality type and appreciating differences.

The MBTI Step II assessment is an extension of Myers' work on the MBTI Step I assessment. It builds on Myers' early studies of special patterns of responses to MBTI items. The Step II assessment helps people explore the next level of type by identifying their individuality or uniqueness within their type. To accomplish this, the Step II assessment identifies the ways people use particular facets of the four pairs of opposite preferences.

Applications of the MBTI® Step I™ and Step II™ Assessments

Here is a list of applications for the MBTI Step I and Step II assessments.

- Self-understanding and individual development
- Team building
- Management and leadership development
- Coaching
- Organizational development
- Diversity and multicultural training
- Problem solving
- Career development and exploration
- Academic counseling
- Education and curriculum development
- Individual and relationship counseling

PREPARING FOR THE WORKSHOP

Check Your Skills and Knowledge

Because you are an MBTI® Certified Practitioner, we assume you have a solid knowledge and understanding of the Step I and Step II assessments and that you already use the Step I assessment in a group setting. We therefore will not cover the basics of a group interpretation session. As the facilitator of the Step II training workshop, you will need to make use of your knowledge or refresh it in the following areas.

Step I™ Type

- The Jung-Myers theory that underlies the MBTI approach
- Key differences between the MBTI approach and other approaches to personality
- The four pairs of opposite preferences and their definitions
- Type dynamics: How the preferences combine to form types
- Characteristics of each of the 16 types
- Contents of the *MBTI® Manual* (Myers, McCaulley, Quenk, & Hammer, 1998) and relevant *Introduction to Myers-Briggs® Type* series booklets

Step II™ Type

- The 20 Step II facets and their relationship to Step I preferences
- The differences between Step I and Step II scoring systems
- Names of opposite facet poles and their descriptions
- Step II scoring and interpretation categories
- The contents of the *MBTI® Step II™ Manual* (Quenk, Hammer, & Majors, 2001)
- The contents of the *MBTI® Step II™ User's Guide* (Kummerow & Quenk, 2011, 2015)

Consider How You Will Use the Step II™ Assessment with Your Clients

Here are some questions and answers to help you think through the appropriate uses of the instrument with your clients.

Should I use the Step II™ assessment with a particular client group?

No version of the MBTI assessment is appropriate for use in the presence of one or more of the following issues:

- The group is in significant turmoil
- The group has unrealistic expectations
- Key leader(s) refuse to participate but want access to information about others
- Untreated mental illness in one or more of the participants significantly affects their work
- Resources (time, money) cannot be allocated

Does the Step II™ assessment fit the needs of this group?

- Will the Step II assessment fit the objectives of your session? See the "Objectives for This Workshop" section, above, to help you answer this.
- Will you have enough time? Introducing the Step II assessment to a group takes at least twice as much time as introducing the Step I assessment.
- Is the client willing to make the investment (time, money) in a Step II training session?

Plan to arrive at the training location before the workshop starts to confirm that the room is properly set up. Many trainers find that at least an hour is needed to get things ready.

- Hang or place type table and facet table posters in convenient places around the room.

- Make sure you have enough dark-colored markers (i.e., no yellow, red, orange) to enable each participant to use one.

- Have name tags ready, if needed.

- Make sure the projector works and projection is in the sight line of all participants.

- As people arrive for the session, note whether anyone has a physical challenge that might restrict his or her movement. If someone does, check with that individual privately before the session begins about any special needs. You might want to have participants with special needs find a comfortable place in the room and instruct their activity group to always meet in that spot.

GUIDELINES FOR CONDUCTING YOUR WORKSHOP

Now you're ready to meet with the group and begin your workshop. Here are several things to think about as you use the Step II assessment in your session.

What language do I use in describing the preferences and facet poles?

With Step I type, it is appropriate to speak of Extraverts and Introverts because those words seem to be in the common vernacular. However, with the rest of the preferences, it's best to use the preference as an adjective, for example, a Sensing type or Perceiving people. At present, with the 20 facets and their 40 facet poles, we have no hard-and-fast rules regarding the names. Do what seems easiest for your tongue and for your group, but be aware that using the facet pole name alone can be perceived as more negative than you wish. For example, when you direct people into groups it might not sound appropriate to say "Toughs" and "Tenders," so you'd say "Tough types" and "Tender types," or "people who score Tough" and "people who score Tender." When in doubt, use the facet pole name as an adjective rather than as a noun.

How do I decide which activities to use?

Consider the following:

- Decide on your objectives first and then look for activities that meet those objectives within the time constraints of the workshop.

- Gauge your group's abilities and its readiness to complete the activity. Any activity that requires some self-assessment and "public" announcement of that assessment requires trust among participants.

- Make sure the activity will work with the group's mix of types/facets. Some activities are dependent on a type mix to show differences, and others are not. As a substitute for a missing perspective, we have provided the responses from people of all types who have completed various activities just in case you need them.

Support for Step II™ Theory

The orientations and processes described in the Jung-Myers approach are complex, and they are made up of several component parts—they are multifaceted. For example, Extraversion–Introversion includes such aspects as sociability, activity level, expressiveness, and so on. The E–I preference pair in the Jung-Myers system is not defined simply as "sociability," though the definition in some other theory might indeed be limited to this one attribute; if it were, it would be "unidimensional."

Development of the Step II™ Assessment

Myers' early work on a version of Step II was further developed with Dr. Mary McCaulley, who later served as president of the Center for Applications of Psychological Type (CAPT) in Gainesville, Florida. After Myers' death in 1980, Dr. David Saunders, who had worked with Myers on the early development of the MBTI Step I assessment, factor-analyzed all the items Myers wrote over the years and produced factors or subscales that were quite similar to the patterns Myers had identified. Saunders' subscales were the original version of the facets we use today. Form Q, developed by a team of type experts, was based on responses from a carefully drawn random sample of the US population, aged 18 and older. The Form Q assessment includes the 93 Form M items plus an additional 51 items unique to Form Q. See Table 6.7 in the *MBTI® Step II™ Manual* for the overlap between Forms M and Q.

For more information, see the *MBTI® Step II™ Manual*.

Facet Scores Do Not Add Up to Step I™ Preferences

Each basic MBTI preference is broader in overall meaning than its five facets—first, because there may be additional, as-yet-undiscovered facets that contribute to a preference, and second, because even if we were able to measure all the parts of a preference, we still would not capture its overall meaning. With type, the whole is greater than the sum of its parts. For example, Extraversion covers more than connecting, talking, group orientation, face-to-face communication, and outward enthusiasm. And only some of the items that make up the overall preference are used in each facet, and they are weighted differently in the two different scoring systems.

Bottom line: You can't add the facet scores together to get the preference clarity index of each Step I preference pair.

How Facets Were Named

The facets poles were named to reflect the item content of each facet. The goal was to capture the essence of the pole using positive or neutral terms. No one pole is meant to sound better than the other, although some people may inappropriately impose their own biases on some pole names.

How Facets Are Ordered

There were early attempts to use a statistical and/or conceptual rationale for ordering the facets. However, these attempts did not hold up consistently and/or were misinterpreted by users. The current order is now standard for Form Q and is likely to be so in future forms.

or midzone is effective depends on individual factors that can't be generalized. In most situations, it's easier to have a pole to quickly "hang your hat on." That is, it's helpful to have a way of responding that is practiced and automatic. If you are using a facet in a midzone, situational way, additional time and effort may be necessary to decide which pole is most appropriate. If time is short and stress is high, this may actually make things a bit more difficult.

Ask your clients with a midzone placement if it is accurate for them. If it is, what it probably reflects is that they don't have a clear or consistent preference for either pole of the facet and may be choosing which pole to use on a situation-by-situation basis. Spend some time identifying any patterns of when the client chooses one pole over the other and whether that choice is an effective one.

CONDUCTING THE WORKSHOP

Workshop Agenda

Topic	Time
Introduction and Icebreaker	10–15 minutes
The First Step: MBTI® Step I™ Results	15–30 minutes
Exploring the Next Level: MBTI® Step II™ Type	35–40 minutes
Reading Your MBTI® Step II™ Report	5–10 minutes
Understanding the Facets Include a 15-minute break after E–I facet reflection	120 minutes
Putting It All Together	15–30 minutes
Reflections and Closing the Session	10 minutes

Note: Times may vary based on factors such as size of the group and cultural considerations. You will need to determine the break times that work for your group. A break time may be extended or scheduled as a lunch break.

This agenda is presented as a guide to help you create your own agenda, using actual start and stop times. With practice, and as you gain familiarity with the Step II assessment, you will be able to more accurately gauge your delivery speed and can adjust the times for each module accordingly. After a few times through you will learn what you can cut out and how you can simplify the material to meet your needs. Use our times only as a rough guideline.

For example, if you have time, you can explain each facet pole and midzone scoring option in more depth and detail and give examples. If you are short on time, a simple explanation of the facet's content and two poles will suffice.

Slide	Facilitator Notes
36	**The Relationship Between the Step I™ and Step II™ Assessments**

Suggested script:

Now that we've looked at the five facets of Extraversion and Introversion, let's see how they relate to your Step I basic preference on the E–I preference pair. As I pointed out at the beginning of the workshop, the Step I assessment highlights characteristics you have in common with other people of the same type. The Step II assessment gives you a way of individualizing your MBTI results by identifying some of the complexity of your Step I personality type.

We have seen that type is made up of your preferences in four categories. When each of those preferences was described, you may have noticed that there were many aspects of each preference, and thus a variety of ways of expressing that preference. For example, a preference for Extraversion or Introversion involves more than sociability and talkativeness. It also includes activity level, communication style, friendship patterns, task focus, and so on.

Not all Extraverts experience and express all aspects of Extraversion, nor do all Introverts use their Introversion in the same ways. One Extravert, for example, might really enjoy meeting friends at large parties, while another Extravert might hate this and prefer meeting friends one at a time. Yet they both get their energy from interacting with the outside world. The Step II assessment identifies some aspects of Extraversion–Introversion, but not all of them.

Here's an illustration of how this works. Note that the large circle, representing Extraversion–Introversion, contains diamonds of different colors. On five of the diamonds are the names of the Extraversion–Introversion facets of the Step II assessment—Initiating–Receiving, Expressive–Contained, and so on. There are two diamonds with no "names" representing possible additional aspects of Extraversion–Introversion that have yet to be identified. Perhaps a different method and different items would find them. Also note that there is empty space between the diamonds. This space illustrates the notion that the whole of any type preference is more than just the sum of its parts. In other words, a type preference is broad and complex, and there is more to it than the facets we can identify.

| 37 | Suggested script: |

There is one more very important piece of information about the relationship of the facet scores to their underlying Step I preference: The facet scores do not "add up to" the score on the overall basic preference. As we just saw, the basic MBTI preferences are broader in overall meaning than just their five facets. We saw, for example, that Extraversion is more than connecting, talking, group-oriented, face-to-face, and outward energy. Again, the whole is greater than the sum of its parts. Furthermore, different scoring systems are used for the preferences and the facets, and the items used to determine a preference are weighted differently than are those used for single facets.

The same principle applies to all the other preference pairs and their facets.