

BIRKMAN
N E X T

About Our New Initiatives

Birkman Next: Standing on the Shoulders of a Gentle Giant

I filled out my first Birkman questionnaire for fun when I was seven years old. And, believe it or not, that questionnaire is still in our database today. It was a moment with my grandfather, Dr. Roger Birkman, that I remember vividly. I can still see his big grin as he stood watching quietly as I diligently bubbled in the Scantron questionnaire.



Little did I know then, my future would include this career and a mission to continue my grandfather's life work. I had the privilege of working side by side with my grandfather for over ten years.

We talked, we had lunch, we discussed possibilities about the future. He shared his dreams and fears with me. I came to understand that he was a man who, despite his success, struggled with feelings of inadequacy. I began to understand what drove his mission for self-acceptance.



There was a part of me that thought my grandfather would live forever. that perhaps through his passion for his instrument he had unlocked the elixir to eternal life. In 2014, we said goodbye to my grandfather. And with my grandfather's passing, a chapter of Birkman's history came to a close.

Birkman Next represents the next exciting chapter for our 65 year old company.

Starting in 2017, we will be launching new products and trainings in addition to making significant changes to the Birkman reports. The goal of the Birkman Next initiative is to take Birkman, our products, and our users to the next level.



Dr. Birkman with his granddaughter, Morgan

To be considered, any of the changes included in this initiative have to meet two criteria: stay true to the purpose and intent of the assessment and make the information more intuitive and easier to understand. Birkman International is a company made in Dr. Roger Birkman's image. Although he is no longer with us, we celebrate his mission for acceptance every day. We continue our work by standing on the shoulders of this gentle giant. Through his incredible insights, we are able to improve relationships, promote diversity, and work together in a more productive and rewarding way.

This commitment on behalf of Birkman is one thing that will never change.

With gratitude and respect,

A handwritten signature in black ink that reads "Amy".

Amy Shepley
Director, Product Innovations



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Sharon Birkman Fink
President and CEO

"The Birkman Method has evolved over many decades. During my tenure, we've emphasized its integrity while exploring how to make it more convenient. The current changes stay true to our core reporting and bring new features that we believe will make Birkman training clearer, better, and more consistent. And, even more importantly, make it easier for everyone to benefit from Birkman data. Join us in writing this next and newest chapter for Birkman."

Birkman Insights

Formerly 'Birkman on Demand'

Birkman Insights is a text based, topic-driven reporting system.

Birkman Insights reports are easy to use and can be self interpreted. Although the information appears simple, the data is derived from advanced interpretation of the Birkman scales measured by the Birkman Questionnaire.

Birkman Insights can be used as an add-on to coaching, team building, and development, or it can be used as a stand-alone option. There are **more than 25 topics available**, ranging in application from coaching to leadership style.

BIRKMAN INSIGHTS



BIGGEST MISTAKES OTHERS CAN MAKE WITH YOU

The following statements are generated from your Component Need scores. Carefully read each statement and check the ones that are most significant to you. Remember, a statement appears because it may be significant for you, not because it is significant. Only you can decide which statements are most relevant to you.

- Beating about the bush with you
- Excluding you from team activities or questioning your popularity
- Giving you insufficient guidance or instructions
- Forcing you to think and act competitively
- Failing to give you plenty to do
- Interrupting when you are concentrating
- Constantly changing their minds about what they want from you

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Over 25 Topics from Birkman Insights

- A guide for your sales manager
- Accountability
- Advanced Behavioral Analysis
- Biggest mistakes others can make with you
- Birkman Leadership Map
- Birkman Map Summary
- Birkman Sales Map
- Career focus
- Coaching relationship
- Coaching Report
- Coaching to Needs
- Group Organizational Focus
- Handling commitment
- Handling conflict
- How to incentivize you
- How you approach job interviews
- How you prefer others talk to you
- How you prefer others work with you
- How you seek to influence others
- Increasing sales effectiveness
- Increasing your sales effectiveness
- Job Families/Job Titles
- Managerial Style
- Managing your time
- Money and trust
- Motivating you for best performance
- Organizational fit
- Relational disrupters
- Stress Management
- The effect of interests on work
- The effect of interests on your work
- Trust
- What kind of team player are you?
- Your job search
- Your leadership style
- Your learning style
- Your possible challenges
- Your possible ineffective tactics in meetings
- Your relationship with your child
- Your relationship with your spouse or partner
- Your strengths

Birkman Basics

Birkman Basics is a **perfect choice for getting started** with Birkman and can be self interpreted.

Birkman Basics includes four types of Birkman information:

- Birkman Insights
- Birkman Map + Group Map
- Birkman Interests
- Career Exploration Report

The Birkman Map is a tool that identifies people's styles and motivations in four unique areas. The Birkman Map also highlights one of Birkman's key differentiators; the ability to measure underlying Needs.

The Birkman Interests report identifies the activities that energize and motivate people, making it an excellent tool to drive engagement.

Finally, the Career Exploration report is one of the most comprehensive career tools currently on the market. The report uses statistical data to determine the careers and environments that ensure success and satisfaction. The Career Exploration Report can be used to determine fit or to explore future opportunities within an organization.



BASICS

Birkman Interests

The ten interests Birkman measures – **formerly called 'Areas of Interest' – will now be called 'Birkman Interests'**. This name change is consistent with our new naming conventions.



SCIENTIFIC

Research, analysis, intellectual curiosity

Activities include:

Investigating, medicine, experimenting

As shown above, we've **updated our data visualization** with circular graphics.

We have also **renamed two of the Interests** to modernize our reporting:

- **Clerical** → **Administrative**
- **Mechanical** → **Technical**

'**Clerical**' has become an outdated term, so it was an easy decision to change that Interest name.

Regarding '**Mechanical**', the assessment items reflect an equal mix of both technical and mechanical preferences, so the name change remains accurate, yet 'technical' is more modern phrasing and is inclusive of people whose interests include building things both physically or digitally.

We **shortened the definitions to make them more broadly defined** so that there can be better discussion surrounding them.

Birkman Map

Key points:

- 'Life Style Grid' → 'Birkman Map'
- Flat grid appearance → Gradated appearance
- 'Direct' & 'Indirect' → 'Extrovert' & 'Introvert'

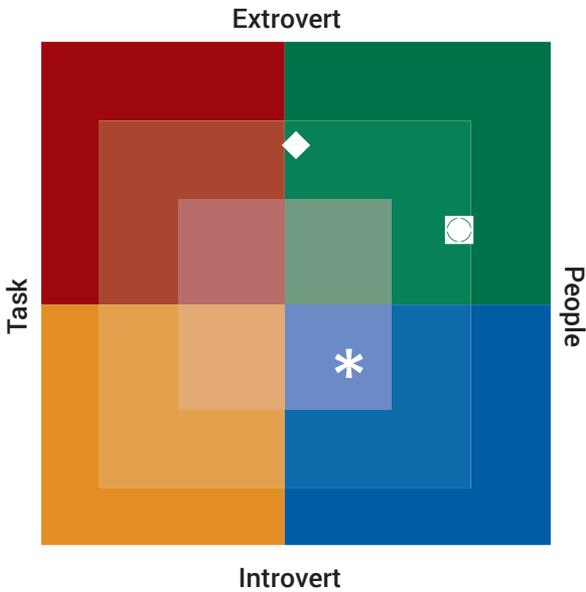
One of the goals, as we examined how to improve our products, was to rename the scales and the reports to more straightforward names that would make it easier to remember and apply Birkman concepts.

One of the names that we decided needed changing was 'Life Style Grid.'

We chose the name '**Birkman Map**' to replace '**Life Style Grid**' because ultimately it is a charting of your Birkman data and the coordinates of your personality. You can see where you fall on the map of Birkman data. We feel that it reflects the multi-dimensional nature of Birkman and gives better clarity for end users.

If you look at the Birkman Map, you'll notice that we've **changed it from a flat grid into a gradated grid**. This change creates a more modern look, but, more importantly, it lends itself to a debriefing of the map. Depending on the location of the symbol and the saturation of the section of the map, it is easy to identify if a person is "intensely green," "moderately green," or "in the middle." Instead of guessing where a symbol is, you can get a clearer context within the different quadrants of the Birkman Map.

The other notable shift we made is **changing 'Direct' and 'Indirect' on the vertical axis to 'Extrovert' and 'Introvert.'** Today, the terms 'extrovert' and 'introvert' are part of the everyday vernacular. There has also been a shift towards viewing introversion much more positively, which wasn't the case 65 years ago.



We are frequently asked how extroversion and introversion map to Birkman reports. At first glance, many assume extrovert and introvert map to the Acceptance Component. However, the answer is most accurately reflected on the Y axis of the Birkman Map, which captures all the elements of true extroversion/introversion, including sociability, activity level, emotional capacity, and sensitivity.

The change in terminology regarding extroversion and introversion allows us to highlight one of the key differentiators of the Birkman.

As Carl Jung noted, “There is no such thing as a pure introvert or extrovert.” Most people are a blend of both. This concept is perfectly captured by the Birkman Map, where we can identify the combination of the two that make each person unique.

"These innovations are the culmination of over 14 years of personal experience in working with The Birkman Method. The goal is to **make Birkman more accessible** and to present the information in a way that is **exciting and provocative to the next generation of workers**. It is my sincere belief that the experience of using Birkman now matches the elegance and sophistication of the assessment itself."

Amy Shepley
Director, Product Innovations



Birkman Signature Report

Key points:

- The first-ever core Birkman report
- Excellent for most applications
- Includes: Birkman Map, Birkman Interests, Components, Birkman Insights, Career Exploration Overview, and Action Plan

The Birkman Signature Report was born from a desire to create a CORE Birkman report. It paints a deep picture of personality while cutting down on the data and reports that new users rarely leverage. This report is the ultimate manual for understanding yourself and others, including the underlying traits that make up the unique value within each of us. The most popular uses of the Birkman Signature Report are for:

- Leadership Development
- Team Building
- Talent Selection
- Career Exploration
- Sales and Negotiation

We approached the Signature Report as a story – **walking through the Birkman data from a high level (the Birkman Map) to a granular level (Component scales)**. It gives you a chance to “unpack” data as you go. The report also has space at the beginning for you to define their goals for their feedback session and space at the end to create an action plan.

One of the differentiators about Birkman is that we combine behavioral and occupational data into one assessment, reflected in the Signature Report. In addition to the Birkman Map, Birkman Interests, Components, and Birkman Insights, we have included a summary of Career Exploration data in the Signature Report.



SIGNATURE

Birkman Components

Key points:

- **Multiple Components have changed names:**
 - Esteem → Self-Consciousness
 - Acceptance → Social Energy
 - Structure → Insistence
 - Authority → Assertiveness
 - Advantage → Incentives
 - Activity → Physical Energy
 - Empathy → Emotional Energy
 - Change → Restlessness
- **Meaningful iconography, colors, and order for Components**

The reasoning for the Birkman Component name changes is that the names for at least 20 years were focused around Needs and a desire to remove clinical-sounding terms.

However, many of us at Birkman have seen the Component names as a hurdle for users learning about The Birkman Method because they aren't intuitive, and – in some cases – they hide the real meaning of the scale. For example, the Change Component doesn't measure how frequently the person changes but rather if they are easily distracted or restless.

We looked at what the scales actually measure and identified names that consistently fit the existing directions (high or low) of the scales.

For example, 'candor' to replace the Esteem Component wouldn't work because a high esteem score would actually make sense as low candor.

Our two criteria were:

- To make sure the new name is an improvement in the accuracy of what the scale is measuring
- The new name reflected the existing direction of the scale

We've also developed **new color-coded iconography, which are visual representations of what each Component measures**, to make the Birkman Components more memorable.

The order of the Components – **the way they are displayed within the report – has been updated meaningfully** around two key groupings:

- **Energy Components** (Physical Energy, Social Energy, and Emotional Energy) are grouped together because they are correlated – you can see how a person expends their energy. Typically, people with one or two high energy scores will have lower scores for the others.
- **Control Components** (Assertiveness and Insistence) are grouped because they are both ways in which people seek control. Some people control through verbal dominance (Assertiveness) and others control through being formulaic and structured (Insistence). Looking at these Component scores in the context of each other is helpful.



Moving Freedom & Challenge

Freedom and Challenge will no longer be included with the other Birkman Components.

Here are the reasons why:

- 1. Freedom and Challenge aren't behavioral Components, but rather attitudinal perspectives that you have about the world and yourself.** Historically, because we've lumped them into a category with other Components that are focused on behavior, it has been a source of confusion for many people (for example, why the Challenge Component didn't have a Needs or Stress score). By removing Freedom and Challenge from the list of Birkman Components included in the Signature Report, we are **creating better consistency across the behavioral Components** that are discussed within it.
- 2. Freedom and Challenge are more complex scales that are unlike the other Components.** They truly deserve training, reporting, and more isolated focus dedicated to them.
- 3. Because Freedom and Challenge are advanced scales, it's too much information to include in an initial Birkman consultation.** Proper interpretation and discussion around these scores is for an experienced Birkman Certified Professional providing an in-depth feedback to address a particular issue.

Freedom and Challenge will remain available in their own separate report format. These two components have been moved to a new report. Ask your Birkman Certified Professional about getting access to these reports.

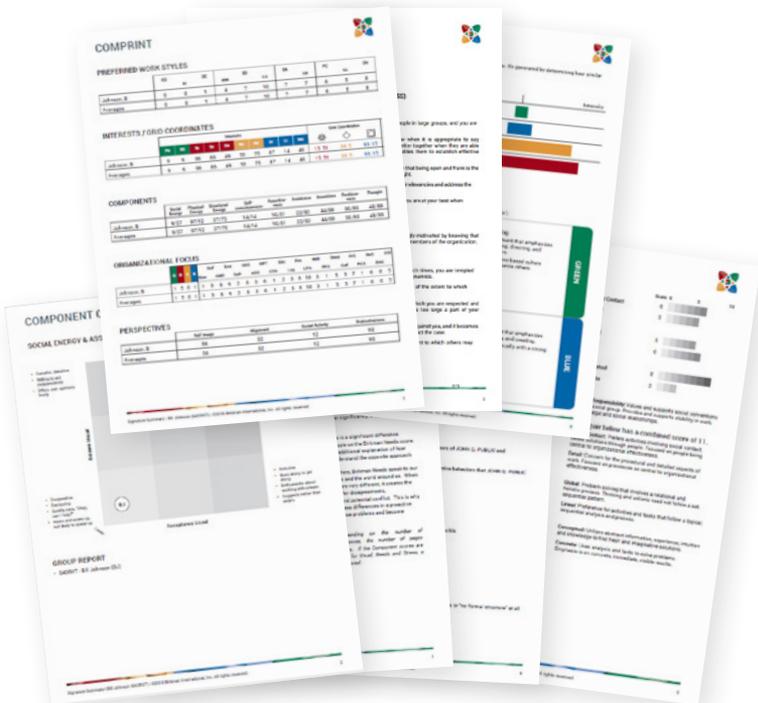
Updated Report Formats

With our updated reports, you will have access to the full suite of 40+ reports, a complete array of insights, all stemming from one assessment.

Birkman has improved these reports to strengthen your Birkman experience. These reports are designed to be more intuitive and easier to use.

This package includes all new report formats and packages, including additional group reports and Birkman's popular Comparative Report.

Ask your Birkman Certified Professional about getting access to these reports.





Carol Buckner
Director of Client Relations

"In the 23 years I have been working at Birkman, I can honestly say I have never been more excited about changes and improvements being made. The mix of being true to Dr. Birkman's legacy and maintaining the validity and relevance of the assessment while also being a leading-edge organization with modern updates is huge. I am so glad I get to be a part of Birkman while these changes are being made."

Support for Birkman Next

Birkman is committed to helping you adjust to the new changes in our reports, and we've created a variety of resources to help.

Ask your Birkman Certified Professional for access to:

- **Birkman Next Videos** – Watch a series of eLearning videos that cover the recent changes. Review the new terminology and updates to Birkman reports at your own pace.
- **Sample Reports** – See the remodeled design of the new reports, including the Signature Report, and share with your colleagues.
- **Signature Companion Guide** – Use this compact booklet to record the scores from your Birkman Signature Report so that you always have them conveniently available at your workspace.





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