

Notes: Issues in the MLI Summary – Terry not listed properly
Mindy vs Mandy. Mindy in the text, Mandy in the PID results

What is the importance of the MLI assessment in measuring the 9-factors of Beliefs and Behaviors?
How might this help the coaching process in the early stages?

This gives a snapshot of where they are right now. In all the stages, the behaviors and beliefs are harder to get from unguided conversations, and this tool serves as a guide and focus to make the conversations more effective at eliciting primary areas that will provide the most impact on their overall Biblical and financial health.

Based on their MLI summary report:

What are some of their strengths you can point out and celebrate?

Terry has fairly well aligned beliefs overall, and they have a good understanding of the purpose of investing. Their belief and behavior for working are aligned well with each other and with the biblical principles.

What areas of improvement would you discuss for Terry? for Mindy?

They both need to work on Debt. The summary is incorrectly filled out for the top 3 areas for Terry. Belief 2, Behavior 1 for Terry, and top ranked in both for Mindy. They also share “weaknesses” in Planning and Managing, but more in the behavioral areas than in belief, so exploring the disconnect should be considered.

What might be some areas of conflict?

Saving and Legacy are potential conflicts. It's possible they could rely on the one with higher alignment of belief and behavior, but it's also possible that the lower alignment would rather be “right” than change. Understanding True Riches may also be a conflict area.

How can they use this information as they navigate conversations around their finances?

What is the importance of the results of PID® to help people better understand their God-given personality?

If you are not aware of your strengths and weaknesses you cannot utilize the strengths as effectively nor can you compensate for your weaknesses. You cannot seek help or guidance for things when you are ignorant of your very ignorance.

How might the PID influence them in making wise decisions?

They are both somewhat prone to impulse and may have a lack of follow-through when it comes to consistent application. Terry is excited by high concept work, but not doing the details, if Mindy can find it fulfilling to work the details, and Terry can provide the recognition and praise for that work, then their efforts might synergize well.

What observations can you make specific to Terry and Mindy from the PID, such as strengths and potential areas of conflict?

In true crisis situations, Terry can shine, but he might also treat everything as a crisis, because that's where he can do the most “driving”. When Terry is getting bogged down and annoyed by needing to follow through with details, Mindy has the opportunity to use her gifting to help motivate him to stay on target.

Terry may be excessively needy in terms of being in charge, and not open to being influenced or convinced by Mindy. Mindy may try to manipulate instead of advise or exhort.

What counsel would you give them in considering their different personalities as they discuss various financial decisions?

Terry: Take your time. Most decisions are not as urgent as they feel. Prayerful consideration and “sleeping” on the choices can help you make wiser decisions.

Mindy: Organize and present your input to Terry.