KEEPING ASSESSMENT LEARNING ALIVE WITH CLAUDE

better your best
BUSINESS PERFORMANCE SPECIALISTS

1. SET CLAUDE UP ONCE, AS A PERSONAL DEVELOPMENT WORKSPACE

The biggest lift comes from context: Claude coaches far better when it already knows your results and goals.

- **Create a dedicated Project** (e.g. "My Leadership Development") and upload your own TTI DISC / Talent Insights report, Hartman Value Profile summary, and debrief notes.
- **Add standing instructions** such as: "Act as my development partner. Ground suggestions in my assessment results. Ask me a question before giving advice. Keep it practical."
- **Write down 2–3 development goals** from the debrief, in your own words (e.g. "Slow down and ask before deciding", "Delegate outcomes, not tasks").
- **Refresh it after each coaching sessio**n with a summary of what shifted.

2. BUILD A PRACTICE RHYTHM, NOT ONE-OFF CHATS

Insight fades within weeks unless it is used; short, scheduled touchpoints keep it in play.

CADENCE	PRACTICE	STARTER PROMPT
Before key moments	Pre-meeting prep	"I'm meeting [person/situation] about [topic]. Given my style, where am I likely to overplay my strengths, and what should I do differently?"
End of day (5 min)	Quick debrief	"Here's a moment that went well and one that didn't. What does my profile suggest was driving each?"
Weekly	Reflection on goals	"Review my week against my 3 development goals. Ask me 3 questions, then name one experiment for next week."
Monthly	Pattern check	"Across my recent reflections, what patterns do you see? Where am I stuck?"
Quarterly	Reset with the plan	"Compare where I am now to personal and professional goals.”

Clients who want a nudge can set Claude to run the weekly reflection as a recurring scheduled task.

3. USE IT TO LEAD OTHERS, NOT JUST UNDERSTAND THEMSELVES

The real test of assessment learning is how a leader adapts to other people - Claude is a safe place to rehearse that.

- **Rehearse hard conversations.** "Role-play my direct report, who is steady and detail-focused. I need to tell them about a deadline change. Push back the way they might."
- **Adapt messages before sending.** "Here's my draft email. I'm high-D; the reader is high-S. Rewrite it so it lands, and tell me what you changed."
- **Plan delegation and feedback.** "Help me hand off this project to someone with a different motivator profile. What will matter to them?"
- **Design team meetings**. With the team's agreement, use the team's style mix to shape agendas, decision steps and how input is gathered.
- **Unpack friction.** "Here's a recurring tension between two team members. Through a DISC lens, what might each be needing?"

Always remember to describe others by their observed behaviour unless the person has shared their report and agreed to its use.

4. KEEP THE COACH IN THE LOOP

Position Claude as the practice field and BYB coaching as where the deeper work happens; each makes the other more valuable.

1. **Before a session:** "Summarize my reflections since [date]: wins, sticking points, and the questions I should bring to Carolyn." Share this summary in advance.
2. **During the session:** the coach works on what Claude can't, such as blind spots, accountability, values conflicts and the Hartman results.
3. **After the session:** adds the key takeaways and new commitments to their Claude Project, so the next weeks of practice build on them.

This turns monthly coaching into a continuous loop instead of isolated conversations.

5. GUARDRAILS TO CONSIDER

A few clear rules keep this useful and protect trust inside their teams.

- **Own data only, unless there is consent**. Upload your own reports freely; upload a team member's report only with their permission and for development purposes.
- **Check your account settings.** Business owners should use a Team or Enterprise plan where possible and review privacy and data settings before uploading people's information.
- **Styles describe; they don't define**. Avoid labelling people ("she's just a high-C"); use the language to understand needs, not to excuse or box in behaviour.
- **No hiring or performance decisions by AI**. Assessments and Claude can inform a conversation, never replace the judgment, fairness, and process those decisions require.
- **Interpretation stays with the certified coach.** Claude can apply insights; nuanced reading of the report, especially the Hartman Value Profile, belongs in a BYB debrief.
- **Sanity-check advice.** If a suggestion doesn't fit your reality, then you should say so and push back.