

# Sales Professional Assessment



This assessment is based on the responses given in the Extended DISC® Individual Assessment Questionnaire. This assessment should not be the sole criterion for making decisions about oneself. The purpose of this assessment is to provide supporting information for the respondent in self-development

## Stephen Sampleship

Organization:

**ACME Inc.**

Date:

**06.13.2017**





## Introduction to Your Sales Professional Assessment

Stephen, you have undoubtedly realized that your success in sales is determined in a very large part by how well you interact with prospects and clients. Your ability to effectively relate, communicate, influence and motivate prospects is a crucial skill in succeeding in your profession and creating successful, long-term relationships with your clients.

You have probably noticed it is very easy to get along with certain people. You almost instantly and effortlessly understand the other person. The communication just flows. It is a lot more than just mutual understanding of what is being said. It is as if the person sees you and the rest of the world in very similar terms. When it happens, everything is easier. Think about the last time it happened. Wasn't it effortless and uncomplicated?

Unfortunately, with most people interactions take more effort. They do not flow as easily. You cannot quite understand where the other person is coming from, what they really want, and what their intentions are. You may also have an uncomfortable feeling the other person is experiencing the same. You know the outcomes of the interaction are not quite what you want. You may lose a sale or frustrate a customer. You are likely to feel disappointed, frustrated and even tired. It takes energy, effort and concentration. Still, the results are not what you hoped they would be.

In these situations you probably feel there is something you could do, but are not quite sure what that is. You know your end goal – your destination – but are not sure how to get there. It is like being lost without a map.

Stephen, this Extended DISC® Sales Professional Assessment will provide you with the map to more successful interactions with prospects and clients. You will learn:

1. The four main human behavioral styles.
2. Who you are and how others perceive you.
3. How to read prospects and client and to better understand them.
4. How to adjust your sales style to achieve your goals.

## Very Brief Background of the Extended DISC® Model

The Extended DISC® System is based on behavioral theories that have been used for over 90 years. The power of this model is that it is easy to learn, understand, and use because it identifies only four behavioral styles of individuals.

People can be divided in four main styles by identifying if they are more:

1. People- or Task-oriented.
2. Reserved or Active.

The resulting four styles are called:

D-style (Dominance)

I-style (Influence)

S-style (Steadiness)

C-style (Conscientiousness)

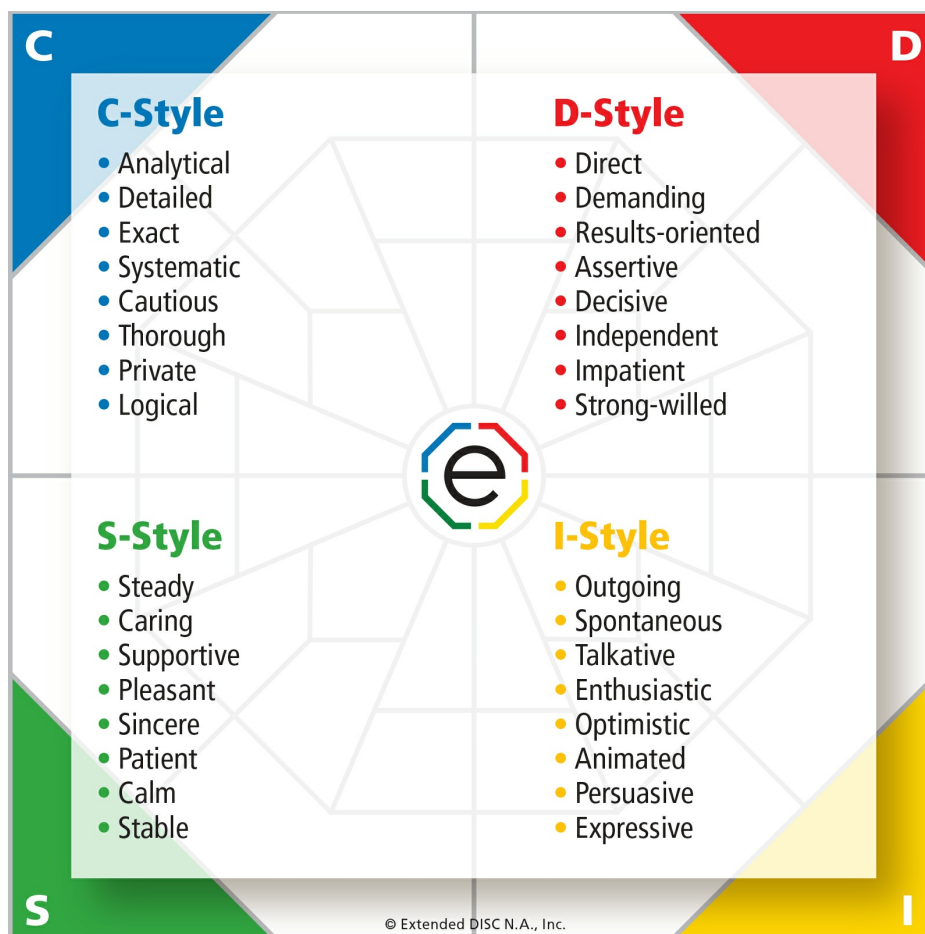




## The DISC Behavioral Styles - The Key points:

In the following pages you will learn about the four DISC-styles. As you get comfortable with their own unique traits and tendencies, please keep the following important points in mind:

- None of the styles are better or worse.
- All styles have strengths and development areas. They just happen to be different.
- Your style does not limit what you can accomplish or how successful we can be. It simply predicts how you tend to do things.
- You can find all of the four styles represented by very successful people. However, the most successful people know who they are. They modify their style appropriately with different styles of people and in different situations.





## Your Sales Profiles

The Profiles are a visual representation of your behavioral style. They are based on your responses to the questionnaire. There are no right or wrong answers.

**Profile I: Perceived Need to Adjust** - Your adjusted style reflects an adjustment that you perceive would help you be successful in your current environment.

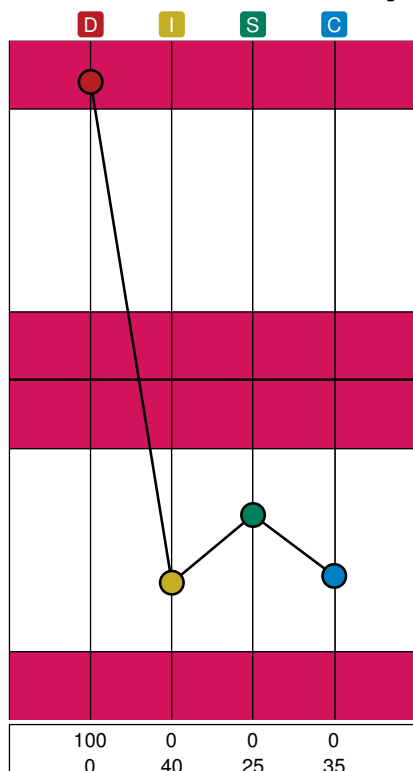
**Profile II: Natural Style** - Your natural style remains fairly stable, but not rigid, over your adult life. It is the style that is most comfortable to you and uses the least energy. Most individuals are a combination of styles.

The styles (D, I, S, and C) that are above the middle line (=top half of the Profile II) are your natural styles. The styles that show below the middle line means that they require more energy from you.

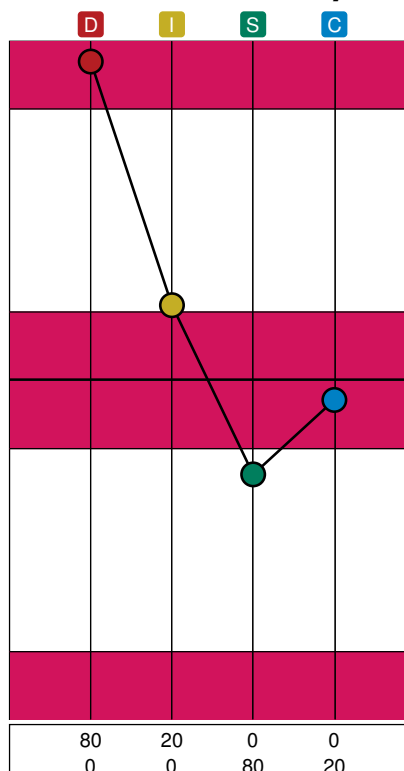
**There are no good or bad behavioral styles - just different ones.**

## Your Profile I and II

**Profile I - Perceived Need to Adjust**



**Profile II - Natural Style**



Your DISC style is: DI (D - 80%, I - 20%)



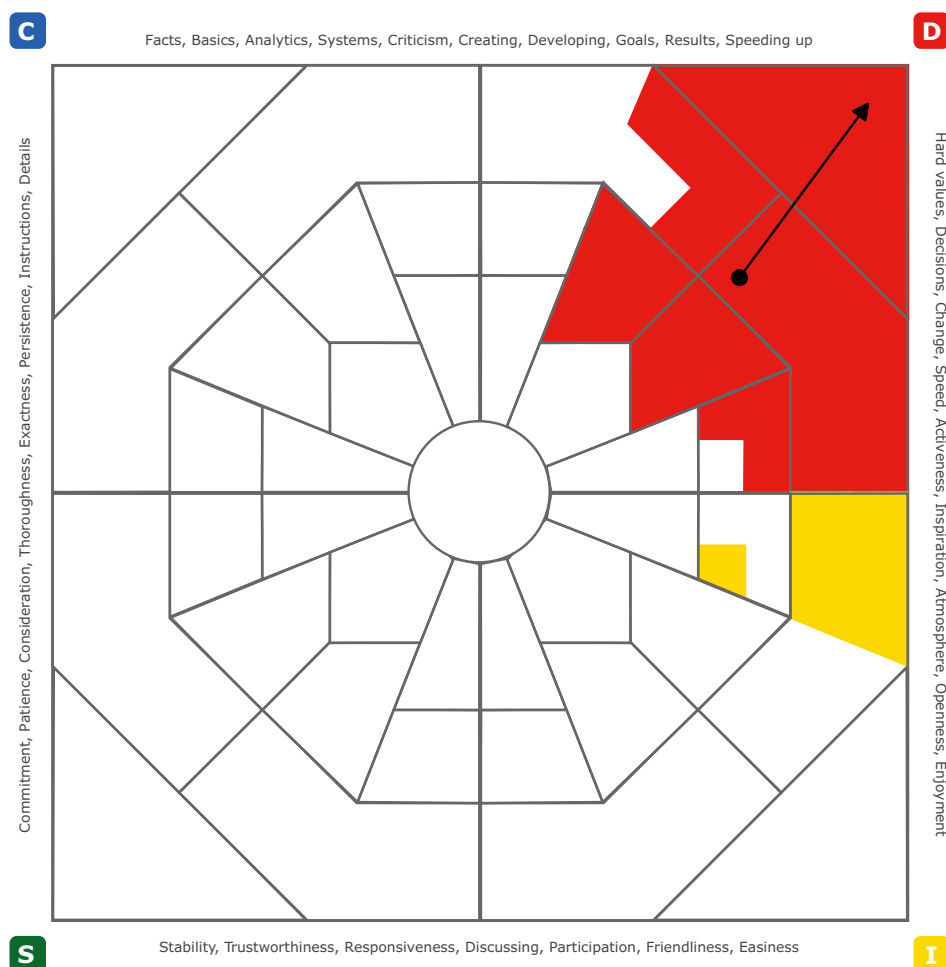
## Your DISC Style

The DISC Model is divided into four quadrants: D, I, S and C.

The rectangle identified in color shows the location of your natural style. Determine in what quadrant it is placed. This is your most natural and comfortable behavioral style (D, I, S or C). The shadings demonstrate the behavioral styles that are quite comfortable for you.

The DISC quadrant(s) that have **shading** represent your DISC **comfort areas** or your natural style.

The DISC quadrant(s) that have **no shading** represent DISC styles **requiring more energy** from you.







## You at a Glance

This page is a description of how others are likely to perceive you. In other words, while the text describes your typical behavior as seen by others, you certainly can modify your behavior to fit the needs of a particular situation and/or individual(s). Also, you may have already addressed the development areas by learning new skills.

## How Prospects May Perceive You:

Strong-willed, decisive, mobile, alert, busy, active, independent, self-initiative, talkative, communicative, appealing, straightforward, ambitious, speaker.

## How Prospects May Perceive Your Communication Style:

This person can control quite a broad scale of communication situations. As long as he knows what is expected from him, he is ready to do anything to attain the goal. By nature, he usually just informs without explaining. Usually, he thinks he is right. As a result, people who disagree with him need to be able to explain their viewpoints clearly.

## How Prospects May Perceive Your Decision-making:

Usually this person is a firm decision-maker. He knows what he wants and does not let traditions, worthless rules nor other restrictions disturb the decision. He makes decisions and forms opinions quite quickly - so quickly that he does not have time to consider how this affects others. He could improve his ability to consider other opinions and wishes.

## Your Strengths:

- Keeps the troops in shape
- Motivates with independence and challenge
- Direct and clear in a diverse way
- Can set the goals
- Demands and maintains speed
- Dares to dive into risks
- Can generate new ideas
- Doesn't stumble in restrictions
- Wants to be the best
- Wants to manage his surrounding
- Doesn't allow jobs to become routine
- Is always ready for change

*"Knowing yourself is the beginning of all wisdom."*

*Aristotle*





## Your Motivators

Stephen is motivated by the opportunities to rule himself and his actions. He likes freedom, variety, challenges, and clear projects. This person should decide work-related matters for himself and after that, have the freedom to complete them. He likes measurable goals.

You are more likely to respond positively and feel energized if these factors are present in your work environment.

- Renewal, generating ideas
- Possibility to win and achieve
- Freedom from boring and tedious tasks
- Getting people involved in the action
- Achieving results by influencing people
- Varying and multifaceted situations
- Freedom caused by change
- Facing new situations
- Possibility to react freely
- Generating new and creative ideas
- Daring to enter the unknown
- Deciding his own matters

Are you taking advantage of comfort areas?

**Identify two *Motivators* that are being fulfilled in your current position.**

1

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2

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**How can you increase their effect on your performance? Be specific.**

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## Situations that Reduce Your Motivation

All of us face situations on a daily basis that we do not like much and tend to drain our energy levels. The items below are likely to decrease your motivation and require more energy from you.

- Having to follow things from the sideline
- Detailed instructions
- Public failure
- Showing weakness
- Losing position
- Boring and dull people
- "Hesitators"
- Routine tasks
- Waiting, staying in line
- Restraints, restrictions
- Having to be at the end of the line
- Slower paced people

Carefully consider *Situations that Reduce Your Motivation*. Be aware of their impact on making your goals a reality. Are you prone to procrastinate with situations/tasks that correspond to items listed above?

**Identify two *Situations that Reduce Your Motivation* that create the greatest challenge in your current position.**

1 \_\_\_\_\_

2 \_\_\_\_\_

**How can you decrease their effect on your performance? Be specific.**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_







## Your Strengths

Strengths are items that tend to be easier, more natural and require less energy from you.

- Keeps the troops in shape
- Motivates with independence and challenge
- Direct and clear in a diverse way
- Can set the goals
- Demands and maintains speed
- Dares to dive into risks
- Can generate new ideas
- Doesn't stumble in restrictions
- Wants to be the best
- Wants to manage his surrounding
- Doesn't allow jobs to become routine
- Is always ready for change

Most of us tend to overlook our strengths, even taking them for granted. Do not let that happen to you. Instead, consider the items listed above and think how well you are taking advantage of these valuable behavioral traits. Please use caution however; remember that an overused strength very often becomes a weakness and a serious liability to our performance.

**Identify two *Strengths* that you can capitalize upon in your current position.**

1

2

**How can you maximize the impact of your *Strengths*? Be specific.**

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## Reactions to Pressure Situations

These are NOT descriptions of your weaknesses or present behavior. They are items that you should be cautious about since these reactions in pressure situations may become more evident. Understanding how you react to pressure situations can make it easier to deal with them.

- Operates too directly and spontaneously
- Forgets the instructions just received
- Asks for advice but doesn't listen
- Doesn't inform about changes
- Makes too big changes
- Doesn't consider details important
- Doesn't follow-up
- May get excited too spontaneously
- Sees only the broad lines and the big picture
- Is too fast for others
- Doesn't tolerate slower paced people
- Doesn't listen





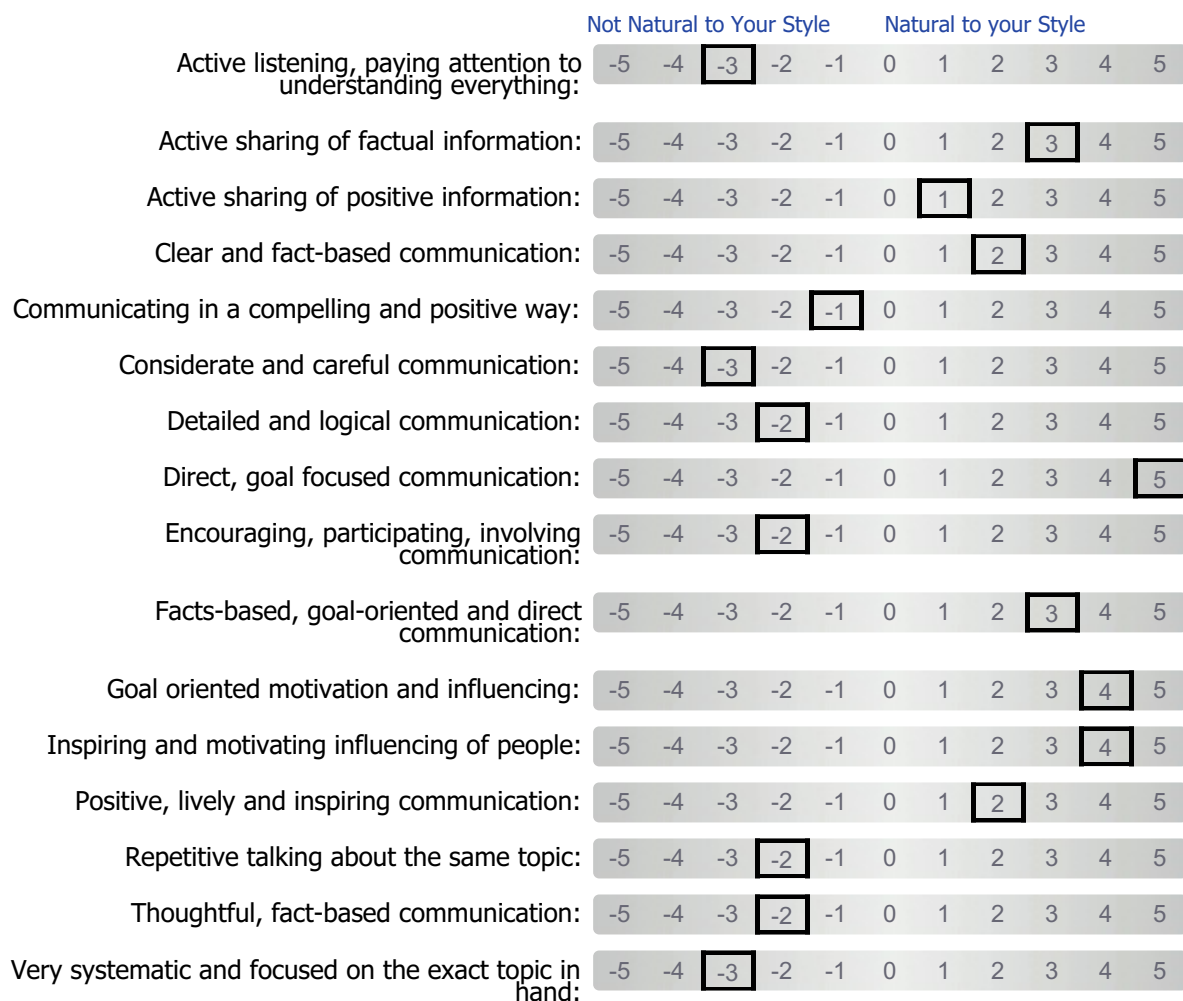
## Your Communication Style with Prospects and Clients

We all have our own unique communication style. When we become aware of how we tend to communicate with others, it becomes easier to make conscious modifications to our style. These modifications improve our effectiveness with prospects and clients.

### Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify your preferred communication styles. Be conscious not to overuse them.

The **rectangles to the left side** of the graph identify communication styles that require more energy from you. You **CAN** communicate this way, but it may require more energy and concentration.



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	Not Natural to Your Style						Natural to your Style				
Allowing others to talk while expressing that he/she is listening:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Being able to take over the conversation from where the other person stopped:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Focusing more on the details than the big picture:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Focusing on listening without outward reaction:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Focusing only on the essential information:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Listening and expressing understanding with body language:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Listening by being present and available:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Listening carefully without interrupting:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Listening to short and exciting stories:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Paying attention only to the essential information:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Paying attention to the facts and details:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Paying attention to the logic in what is being said:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Preferring to listen to short stories only:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Preferring to talk instead of listening:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Showing interest, listening and participating:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Trying to connect the details to the big picture:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Wanting to proceed logically and calmly:	-5	-4	-3	-2	-1	0	1	2	3	4	5



## How Prospects and Clients View Your Communication Style

Your message and your communication style come across differently to different people. While you cannot control others, you can be more aware of your natural communication style and how it is perceived by others. Then you can make the necessary adjustments in your interactions with others.

### **This is how your prospects and clients may perceive your communication style.**

This person can control quite a broad scale of communication situations. As long as he knows what is expected from him, he is ready to do anything to attain the goal. By nature, he usually just informs without explaining. Usually, he thinks he is right. As a result, people who disagree with him need to be able to explain their viewpoints clearly.

**Identify an aspect of your communication style that is the most comfortable for you. What impact does it have in your selling? How can you capitalize on it more effectively?**

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**Identify an aspect of your communication style that is the least comfortable for you. What impact does it have in your selling? What can you do to improve?**

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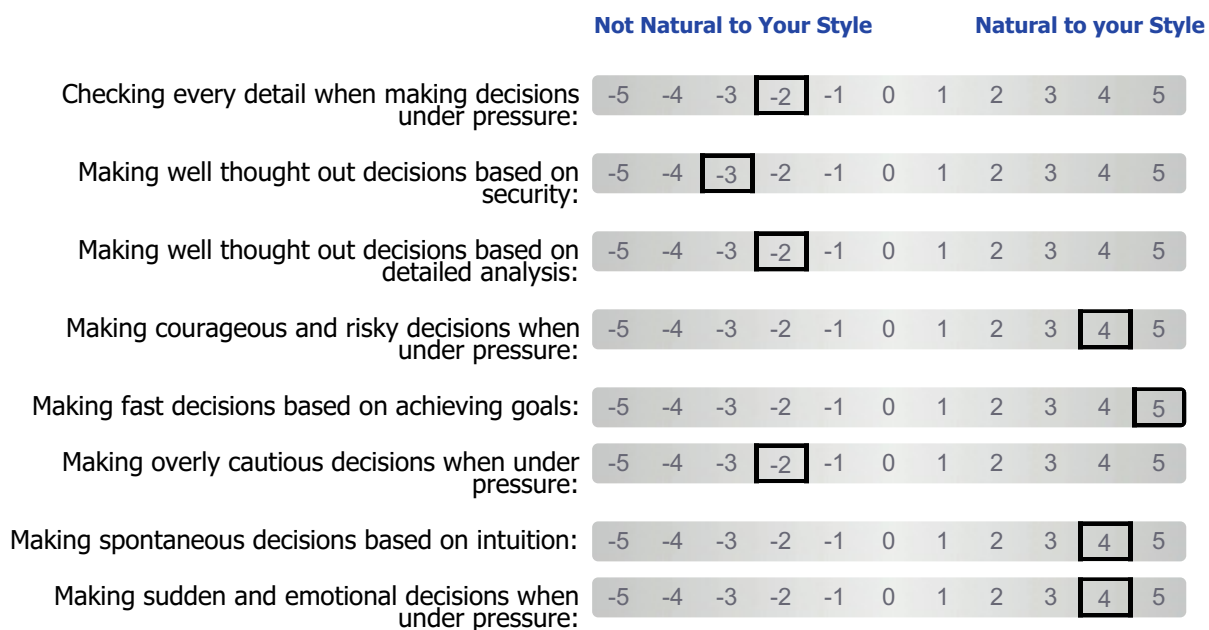
## Your Decision-Making Style

There is no best style for making decisions. However, we all have our own most comfortable way of decision-making. Successful people are aware of their preferred style and make conscious adjustments based on the requirements of each unique situation.

### Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify your preferred decision-making styles. Be conscious not to overuse them.

The **rectangles to the left side** of the graph identify decision-making styles requiring more energy from you. You CAN make decisions this way as long as you concentrate more.



*"It is understanding that gives us the ability to have peace. When we understand the other fellow's viewpoint, and he understands ours, then we can sit down and work out our differences."*  
**Harry S. Truman**





## How Others View your Decision-Making Style

No matter what you do, others will have their own perceptions of your behavior.

**This is how your decision-making style may come across to others.**

Usually this person is a firm decision-maker. He knows what he wants and does not let traditions, worthless rules nor other restrictions disturb the decision. He makes decisions and forms opinions quite quickly - so quickly that he does not have time to consider how this affects others. He could improve his ability to consider other opinions and wishes.

**Identify an aspect of your decision-making style that is most comfortable for you. What impact does it have in your current position?**

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**Identify an aspect of your decision-making style that is least comfortable for you. What impact does it have in your current position? What can you do to improve?**

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## Improving Your Sales Success

Stephen, below are a few reminders and suggestions on how to further improve your success as a Sales Professional.

### Reminders

- Include the client in the conversation
- Remember that it will be a lot easier for you if you find out first what the client wants
- Create a system that forces you to contact every client regularly
- Take care of even the less interesting clients
- Remember to pay attention to the customer's needs all the time, so that you will not get excited over the wrong things
- Create ways to make sure that the client is not left alone
- Write down where you left off at your last meeting, so you can show the client that he/she is important

### Suggestions of What to Avoid

- Do not underestimate the client's needs - they are real to them
- Do not interfere with other roles; focus on the one you specialize in
- Make sure you do not leave any selling project unfinished
- Do not take on too many productive projects simultaneously
- Do not take on more clients than you can handle
- Do not look for new things if you cannot take care of the existing duties first
- Do not try to "beat" the client





## Your Sales Behaviors

There is no one best sales style. However, successful Sales Professionals have some things in common. They are confidently self-aware and comfortable with their strengths and development areas. Also, they are careful not to overuse their strengths to a point they become weaknesses.

Stephen, below are a list of Sales Behaviors. This is not a "can or cannot do" scale. The **higher the number** (items more to the right of the graph), the more comfortable you are with this sales behavior. The **lower the number** (items more to the left of graph) the more energy and concentration needed for this behavior.

	Not Natural to Your Style						Natural to your Style				
Strong goal-oriented influencing of people:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Accepting direction how to achieve sales goals:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Actively and constructively dealing with conflict:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Actively listening to the prospect's/customer's needs:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Aligning an existing product to buyer's needs :	-5	-4	-3	-2	-1	0	1	2	3	4	5
Assertively driving to end result:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Assertively moving prospects through the sales process:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Being open to accept coaching in sales:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Bravely continuing to take action when facing conflict:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Communicating actively in an expert, not a sales role:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Complex selling that requires custom product solution:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Consistent searching for new deals:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Consistently following the sales process:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Consistently maintaining positive outlook:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Contacting customers in an expert role:	-5	-4	-3	-2	-1	0	1	2	3	4	5



Controlling the sales call and not allowing it to become just a conversation:	-5	-4	-3	-2	-1	0	1	2	3	4	<b>5</b>
Courageous expression of own opinions and ideas to a customer:	-5	-4	-3	-2	-1	0	1	2	3	4	<b>5</b>
Developing new ideas and solutions quickly in a sales meeting:	-5	-4	-3	-2	-1	0	<b>1</b>	2	3	4	5
Development & assessment of systematic sales process:	-5	-4	-3	-2	-1	0	1	<b>2</b>	3	4	5
Direct, one-off selling:	-5	-4	-3	-2	-1	0	1	2	3	<b>4</b>	5
Engaging the buyer; relationship selling:	-5	-4	-3	<b>-2</b>	-1	0	1	2	3	4	5
Focusing on building strong, long-term relationships:	-5	-4	-3	<b>-2</b>	-1	0	1	2	3	4	5
Focusing on the goal and not on being liked by the prospect:	-5	-4	-3	-2	-1	0	1	2	3	<b>4</b>	5
Focusing on the next step in the sales process:	-5	-4	-3	-2	-1	0	1	<b>2</b>	3	4	5
Focusing on winning:	-5	-4	-3	-2	-1	0	1	2	3	4	<b>5</b>
Following a systematic sales process consistently:	-5	<b>-4</b>	-3	-2	-1	0	1	2	3	4	5

**Identify three sales behaviors that require less energy for you. How are you taking advantage of them?**

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

**Identify three sales behaviors that are the least comfortable for you. What impact does it have in your selling? What can you do to improve?**

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_





## How to Identify Prospects' Styles

Now that you have identified your own style, the next step is to identify the styles of your prospect so that you may then make the most effective adjustments to yours. This is a skill that takes practice, but is easy to learn.

As you become more familiar with the DISC-styles, you will find some people are easy to identify. You will quickly think to yourself: "She is a D-style" or "He is an S-style." These individuals are predominantly one style and can be identified easily.

The rest of the people you encounter will take a little more effort. However, it is a simple, three-step process of identifying your prospect's style:

- Step 1. Observe
- Step 2. Assess
- Step 3. Recognize

### Step 1: Observe

When you meet a prospect, pay attention to traits such as:

- what the person talks about
- how he/she says it – type of words (e.g. "I" vs. "We"), type of questions (e.g. "what?", "why?")
- body language
- tonality

You will discover that observing behaviors will become second nature. Soon you will observe behaviors without thinking.



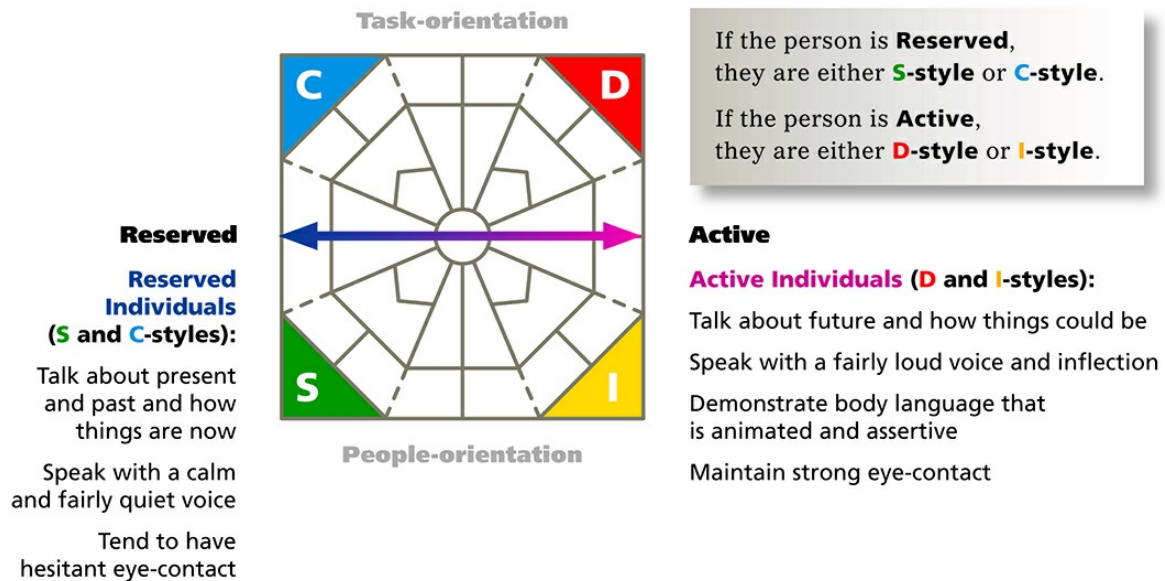




## Step 2: Assess

Based on your observations, determine if the prospect is more:

- Active
- Reserved



### If the prospect is Active, he/she is either D-style or I-style.

- Talk about future and how things could be
- Speak with a fairly loud voice and inflection
- Demonstrate body language that is animated and assertive
- Maintain strong eye-contact

### If the prospect is Reserved, he/she is either S-style or C-style.

- Talk about present and past and how things are now
- Speak with a calm and fairly quiet voice
- Demonstrate body language that is limited
- Tend to have hesitant eye-contact

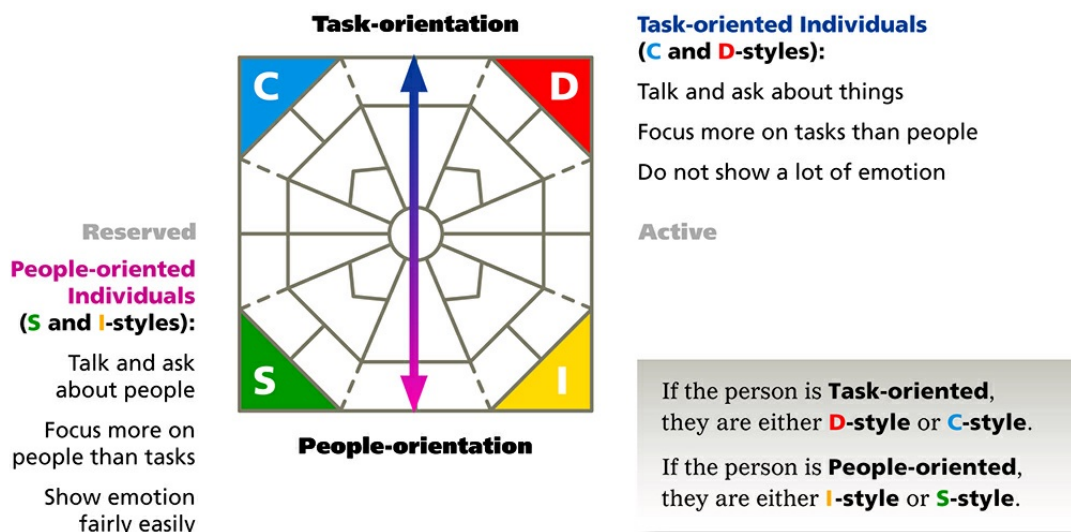




### Next, determine if the prospect is more:

- Task-oriented
- People-oriented

Next, determine if the person is more:  
**Task-oriented or People-oriented**



### If the prospect is Task-oriented, he/she is either D-style or C-style.

- Talks and asks about things
- Focuses more on tasks than people
- Does not show a lot of emotion

### If the prospect is People-oriented, he/she is either I-style or S-style.

- Talks and asks about people
- Focuses more on people than tasks
- Shows emotion fairly easily



### Step 3: Recognize

Now you have the information needed to identify your prospect's style by combining the Active-Reserved and Task-People Orientation.

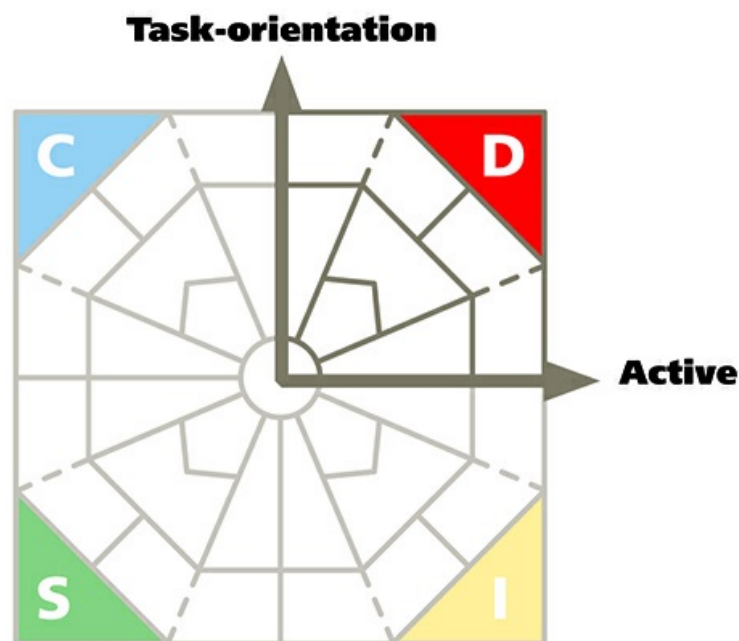
### D-style = Active and Task-oriented

This is how to recognize D-styles.

**Talks about:** Goals, oneself, hard values (\$, revenue, profits) results, change.

#### How to identify a D-style prospect:

- Is decisive
- Is assertive
- Very impatient
- May interrupt you
- Is direct, says what thinks
- "What's the bottom line?"
- Focuses on the big picture
- States own opinions as facts
- "How does this benefit ME?"
- Often appears to be in a hurry
- Makes decisions quickly, almost hastily
- May talk to many people at the same time
- May have difficulty understanding others' viewpoints/feelings





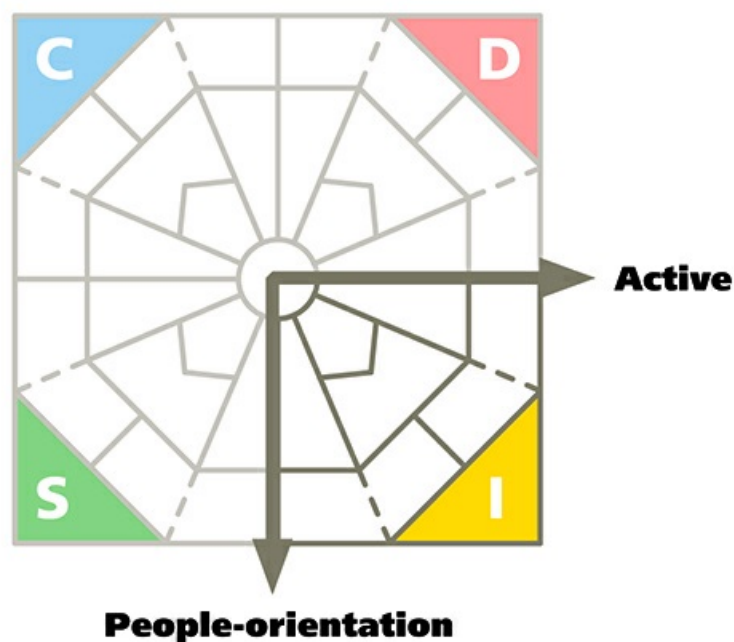
## **I-style = Active and People-oriented**

This is how to recognize I-styles.

**Talks about:** People, team-spirit, good things, future, oneself

### **How to identify an I-style prospect:**

- Talks a lot
- Is animated
- Is open and friendly
- Appears unorganized
- Does not listen for long
- Stays away from hard facts
- Does not pay close attention
- Jumps from subject to subject
- Does not focus much on details





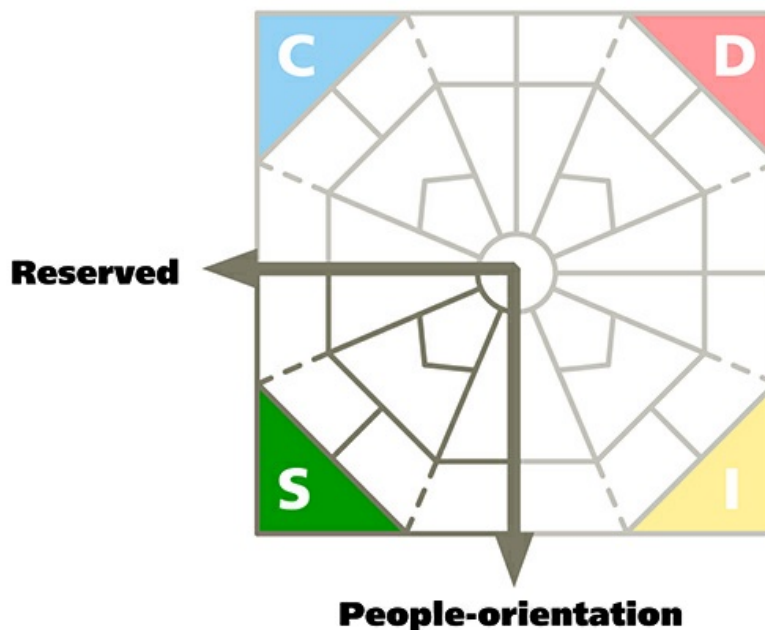
## S-style = Reserved and People-oriented

This is how to recognize S-styles.

**Talks about:** Agreements, principles, past, proofs, one's team

### How to identify an S-style prospect:

- Is easy-going
- Appears calm
- Listens carefully
- Appears thoughtful
- Nods and goes along
- "Let me think about it."
- Likes own physical space
- Does not get easily excited
- Ponders alternatives, slow in making decisions
- Asks questions and inquires about the specifics
- Seems have strong opinions but does not express them vocally
- Completely new ideas/things seem to make him/her uncomfortable





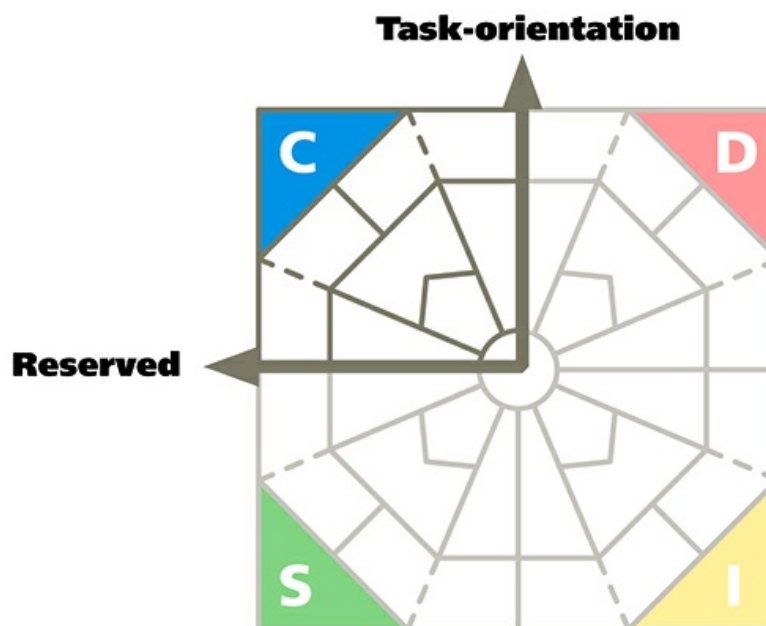
## C-style = Reserved and Task-oriented

This is how to recognize C-styles.

**Talks about:** Facts, analyses, details, rules, instructions

**How to identify a C-style prospect:**

- Is quiet
- Focuses on details
- Proceeds cautiously
- Asks many questions
- Appears reserved and somewhat timid
- Doesn't easily express disagreeing views
- May have done homework on your products/services
- Studies specifications and other information carefully
- Makes decision only after studying pertinent facts/issues
- May be very critical; criticism based on facts, not opinions





## D-style Prospects

*"I never worry about action, but only inaction."*

*- Winston Churchill*

The D-style is the most aggressive and assertive of the four styles. D-styles tend to be quite competitive and results-oriented. As a result, you may perceive D-styles as being quite aggressive, blunt and even rude. Under pressure they can appear to have a lack of concern for others. They do not want to lose control. D-styles want to be in charge and have the power.

D-styles prefer to move fast, take risks and get things done now. They like change and challenges. D-styles may also often want to create change.

D-styles can also be impatient and overbearing. They are often not very good listeners and are prone to make snap decisions.

**Motto:** I did it my way.

**Focus:** Actively controls tasks and things.

**Under pressure – Lack of concern.** This refers to D-styles' tendency to overlook how their actions and behaviors affect others.

**Fear – Loss of control.** This refers to D-styles' desire to be in charge. They do not want to give up control.

**Favorite question:** What? (What is the bottom line? What is in it for me?)

### Communication Style:

- Often to only one direction – he/she talks and expects others to listen
- Expresses own opinions as facts that need no further discussion
- May be blunt and challenges others
- Interrupts others often





**Stephen, when communicating with a D-style prospect, remember to:**

- Offer them other topics of discussion but let them decide what to talk about
- Ask them what information they want
- Do not pressure them into a decision - they may become suspicious
- Let them decide who talks
- Let them control the pace
- Maintain the same behavioral style with them all the time
- Let them control what they want to know

**Stephen, tips on how to develop the relationship with a D-style client:**

- Always provide them with the new products first
- Be friendly, but don't be afraid to state your opinion
- Treat them as a unique individual and learn what they are interested in
- Make sure they always owe you a little
- Keep yourself just a little below their level
- Always be punctual in providing service or support
- Always stay in a role of an expert in only one area - do not try to solve all of their problems

**Stephen, what not to do with D-style prospects and clients:**

- Never offer them only one option - let them decide
- Do not try to beat them
- Do not decide for them what they like and want
- Never try to be better than they are
- Do not forget to express you highly admire their achievements
- Do not have the last word
- Do not use clients as references if they have not given permission

**Moving the business relationship forward with D-style prospects and clients:**

- Let them come up with the big idea
- Let them believe that they came up with the new idea by themselves
- Do not hesitate to provide all the facts, but be careful not to express your opinions
- Do not pressure them, but set a stage for making a decision
- Find out what you can agree upon, and shake hands on it
- Let them decide
- Make it easy for them to make the decision - but let them make it



## I-Style Prospects

*"Why fit in when you were born to stand out?"*

*- Dr. Suess*

I-styles are outgoing, social, and talkative, and like to be the center of attention. They like to interact with others and meet new people. They do not like to focus on details, or spend a lot of time by themselves. Others tend to perceive I-styles as very friendly, enthusiastic and animated.

I-styles are the influencing and interactive individuals who shake up their environment by bringing others into alliance with one another. They know what they want, align everyone together to get it done, and want everyone to like them as they move forward. Social acceptance is very important for I-styles – they like to be liked.

I-styles are talkative, sociable, optimistic and lively. They are people-oriented, spontaneous, energetic and enthusiastic. I-styles tend to be positive and good at influencing others.

I-styles can also be inattentive to details, overly talkative and emotional. They may over-promise because they are so optimistic and eager to be popular. Others may perceive I-styles as somewhat careless, impulsive and lacking follow-up.

**Motto:** "I am a nice person. Everyone should like me."

**Focus:** Actively involved with people and emotions.

**Under pressure – Disorganized.** I-styles have a tendency to focus so much on people that they may overlook details and tasks.

**Fear – Social rejection.** I-styles have a strong desire to be liked by others.

**Favorite question:** Who? (Who is going to be at the meeting? Who else is using this?)

### Communication Style:

- Selling and inspiring
- Talks a lot, but not about details
- Avoids unpleasant subjects
- Good at providing positive, constructive feedback
- Not always direct





**Stephen, when communicating with an I-style prospect, remember to:**

- Show them you are there to help
- Be prepared to listen a lot
- Be ready to adjust to what they are interested in
- Show that you are also interested in the topic and are not just trying to sell
- Make sure you are not pushy
- Try to get them to talk
- Show that you listen and care

**Stephen, tips on how to develop the relationship with an I-style client:**

- Boost their ego and put yours aside
- Confirm in writing everything you have agreed upon
- Remember that you are playing their game; it does not really matter what happens to you
- Stand behind your every promise
- Make sure you remember what they have told you
- Remind them of you often, but in a non-demanding way
- It remains your responsibility to make sure they are given the product/service they truly need

**Stephen, what not to do with I-style prospects and clients:**

- Do not progress faster than they are willing to
- Do not get them enthusiastic about something they will postpone later
- Do not show any aggressiveness
- Do not interrupt them if they get excited
- Do not control the discussion
- Do not force them - you must remain friends
- Do not pressure them into an embarrassing situation

**Moving the business relationship forward with I-style prospects and clients:**

- Give your personal guarantee that this is a good buying decision and that they will be satisfied
- Agree on the deal, but give them one more chance to back out
- Assure them that you will provide them with ongoing support
- If they start to bargain, accept their offer and close the deal
- Do not pressure them but try to make buying easy and quick
- Talk about details at length so they get bored and are ready to sign the deal
- Give them two options to choose from



## S-Style Prospects

*"Nothing in this world can take the place of persistence. Talent will not; nothing is more common than unsuccessful people with talent. Genius will not; unrewarded genius is almost a proverb."*

*- Calvin Coolidge*

S-styles are steady, calm and laid back. While they do like interaction with other people, they are more reserved and less animated than I-styles. S-styles prefer things to remain the same because changes and surprises threaten their sense of security. Family and friends tend to be very important to S-styles. They often defend their own group or team almost emotionally; fairness and justice are very important to S-styles.

S-styles are reliable and stable with an emphasis on cooperating with whoever is in charge to carry out the tasks. They say: "Tell me what, when and how you want it done and I'll be glad to do it." If you do not give me enough details, I won't get started because you might blame me if it gets done wrong."

Since S-styles prefer stability and security, they tend to resist change and need support with it. They want to know how the change will affect their lives. S-styles are also prone to be hesitant in their actions and decision-making. This is primarily caused by their desire to consider others and for everyone to get along.

**Motto:** If it's not broken, let's not fix it.

**Focus:** Involved with familiar people.

**Under pressure – Too willing.** S-styles' have a tendency to be accommodating and polite. Often they say "yes" too easily.

**Fear – Loss of stability.** S-styles have a desire to have a stable and secure environment. Change can be challenging for S-styles.

**Favorite Question:** How? (How are we going to do this? How does this impact us?)

### Communication Style:

- Often only to one direction, he/she listens
- Answers when asked
- Talks calmly
- Creates trust
- Talks about topics he/she masters
- Better in one-to-one situations
- Good instructor





**Stephen, when communicating with an S-style prospect, remember to:**

- Progress logically - do not rush
- Slow down, progress carefully
- Show you respect things that are important to them
- Do not control or dominate the discussion
- Progress step-by-step
- Spend a lot of time building a relationship before starting to "sell"
- Demonstrate that you are honestly trying to help them

**Stephen, tips on how to develop the relationship with an S-style client:**

- Do not forget things
- Respect their opinion
- Learn to understand their way of thinking
- Do not oversell at any stage
- Prepare them for changes - do not let anything surprise them too suddenly
- Regularly send information about the product
- Ask their permission to use them as a reference - but only when you know they will agree

**Stephen, what not to do with S-style prospects and clients:**

- Do not assume that you can decide how fast you can move forward
- Do not participate in discussions where you cannot agree with them
- Do not pressure them
- Do not force them to take action too soon
- Do not hide any information from them
- Do not talk about them to other clients without their permission
- Do not be unpredictable

**Moving the business relationship forward with S-style prospects and clients:**

- Emphasize the support that you will provide
- Give them time and two or three options to choose from
- Get them to plan what they can do with the product/service
- Be both enthusiastic and realistic
- Talk about features they are already familiar with
- Do not be superficial
- Spend time with them without selling anything



## C-Style Prospects

*"I have no special talent. I am only passionately curious."*

*- Albert Einstein*

C-styles are the most analytical of the four behavioral styles. C-styles can be very detail-oriented, focusing on facts, information and proofs. They are comfortable working alone and are the most reserved of the four styles. C-styles are logical and methodical in their approach.

C-styles are cautious and compliant to their own high standards. Their emphasis is to work with the existing circumstances to ensure the quality of the product or service. C-styles make sure that everything works the way it should.

C-styles are sometimes too critical of others. They expect everyone to follow their standards. Their attention to detail and correctness can be perceived as nit-picky by others. C-styles' desire to do things correctly can also slow down their decision-making. They can over-analyze issues and need a lot of information.

**Motto:** "If we do not have time to do it right, do we have time to do it over again?" As a result, C-styles are good in ensuring quality control.

**Focus:** Analyzes tasks and things.

**Under pressure – Overly critical.** C-styles have a tendency to be so focused on the details that they often find mistakes and errors. The other styles may find C-styles too critical.

**Fear – Criticism of work.** C-styles want to be correct and to produce high-quality work. They do not want to make mistakes.

**Favorite question:** Why? (Why does it work this way? Why should we do it?)

### Communication Style:

- Better in written communication
- Doesn't express disagreeing views
- Includes a lot of facts and details
- May miss the big picture
- Doesn't talk about opinions or abstract matters
- Extremely diplomatic







**Stephen, when communicating with a C-style prospect, remember to:**

- Get them to say what their requirements are
- First cover the safety and security issues
- Make promises, keep your promises, and hold them to their counter-promises
- Be prepared to explain in detail the main points
- Be patient and let them go through everything carefully
- Try to avoid exaggeration
- Try not to compete with them at any stage

**Stephen, tips on how to develop the relationship with a C-style client:**

- Set aside time with them and let them analyze and talk
- Never become impatient with them
- Be prepared to repeat the after-sale service
- Always take time to listen and explain
- Never lose your professional standards
- Always be accessible to provide support
- Be patient with their pace

**Stephen, what not to do with C-style prospects and clients:**

- Avoid making it look like a one-time sale; make it look more like a process
- Do not make them take too significant of a step at a time
- Do not suddenly ask them to make a decision
- Do not forget to ask what they consider important
- Avoid making an offer that forces them to immediately respond
- Do not get too excited
- Do not tell them when they need to decide

**Moving the business relationship forward with C-style prospects and clients:**

- Try to take as small of steps as possible, so they feel safe to follow you
- Try to get them to focus on one thing only and get an agreement - it is easier than trying to agree on the entire thing
- Put everything in writing
- Let them select what they want to buy
- Make the next step as small as possible but one that leads to great opportunities
- Offer them an option to back out to lessen their degree of commitment
- Treat them like you were already providing them the after-sales support



## Personal Action Plan: Your Next Steps

Experience has shown creating a concise, simple and specific action plan is the best way to improve performance. To do so, create your "Top 3" lists to help you become more successful.

### My Top 3 Start and Stop List:

Based on what you have learned, discovered and realized through this report, list three important items you will **START** doing:

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

Based on what you have learned, discovered and realized through this report, list three important items you will **STOP** doing:

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

Based on what you have learned, discovered and realized through your report, list three important items you will **CONTINUE** doing:

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_





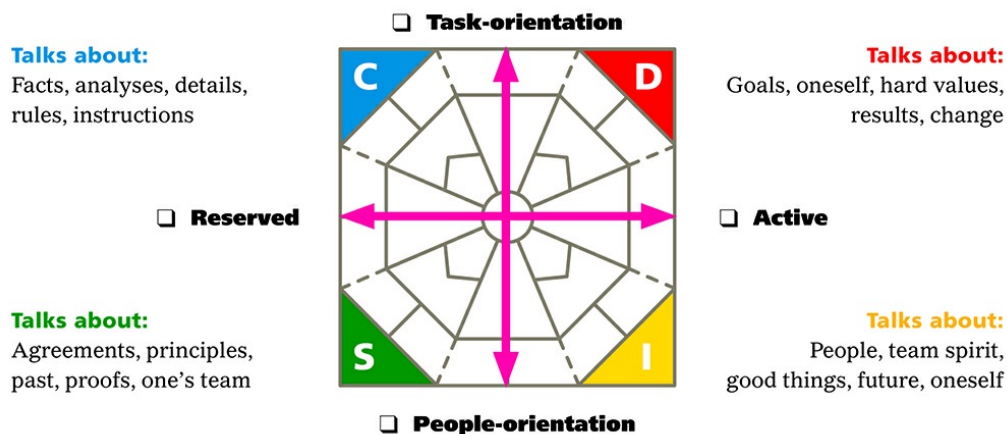
## Prospect Action Plan:

Name of the prospect: \_\_\_\_\_

The person is:

1. Active or Reserved.
2. Task-oriented or People-oriented.

Check appropriate boxes below:



The prospect's style is \_\_\_\_\_.

My Strategy:

Top 3 "Dos": (Examples: Be more direct, take time to chat)

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

Top 3 "Don'ts": (Examples: Talk about details, proceed to quickly)

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_