

Financial Advisor



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.

Isabella Doe

Organization:

XYZ Corp

Date:

08.26.2013



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Introduction to Your Financial Advisor Assessment

Isabella, you have undoubtedly realized that your success in business development 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.

Isabella, this Extended DISC® Financial Advisor 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 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)

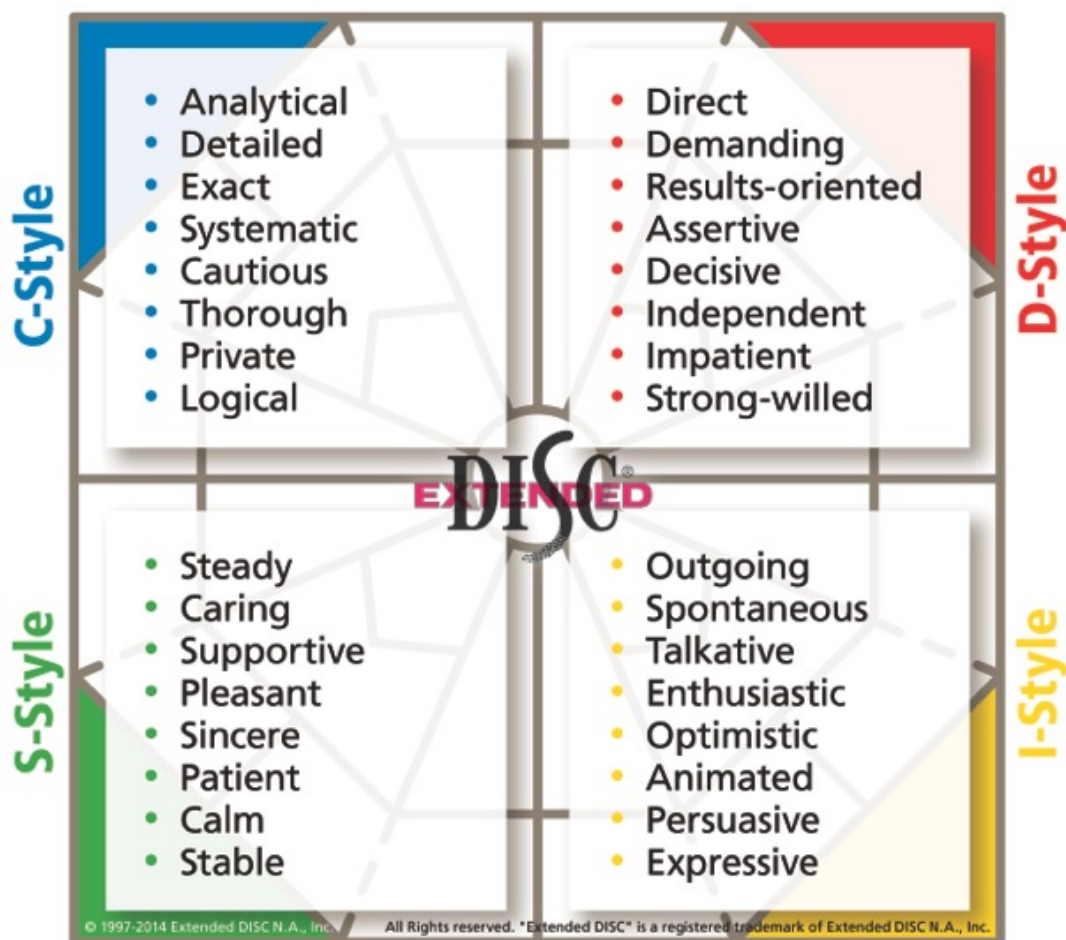
S-style (Steadiness)

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 Extended DISC® 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.

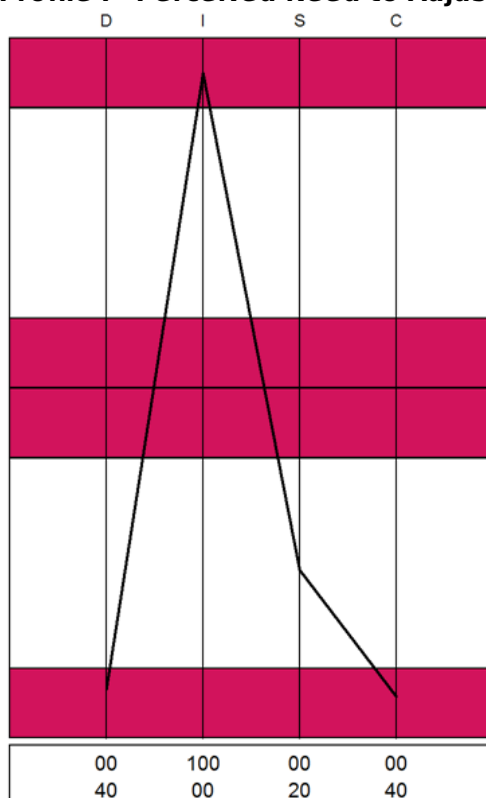
Profile II: Natural Style - Your natural style remains fairly stable, but not rigid, over your adult life. It is the style that is most comfortable to you and uses the least energy. Most individuals are a combination of styles.

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.

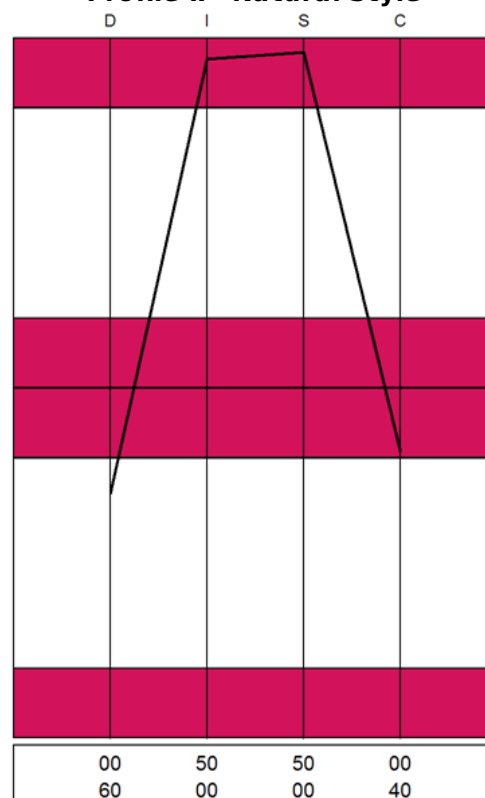
There are no good or bad behavioral styles - just different ones.

Your Profile I and II

Profile I - Perceived Need to Adjust



Profile II - Natural Style



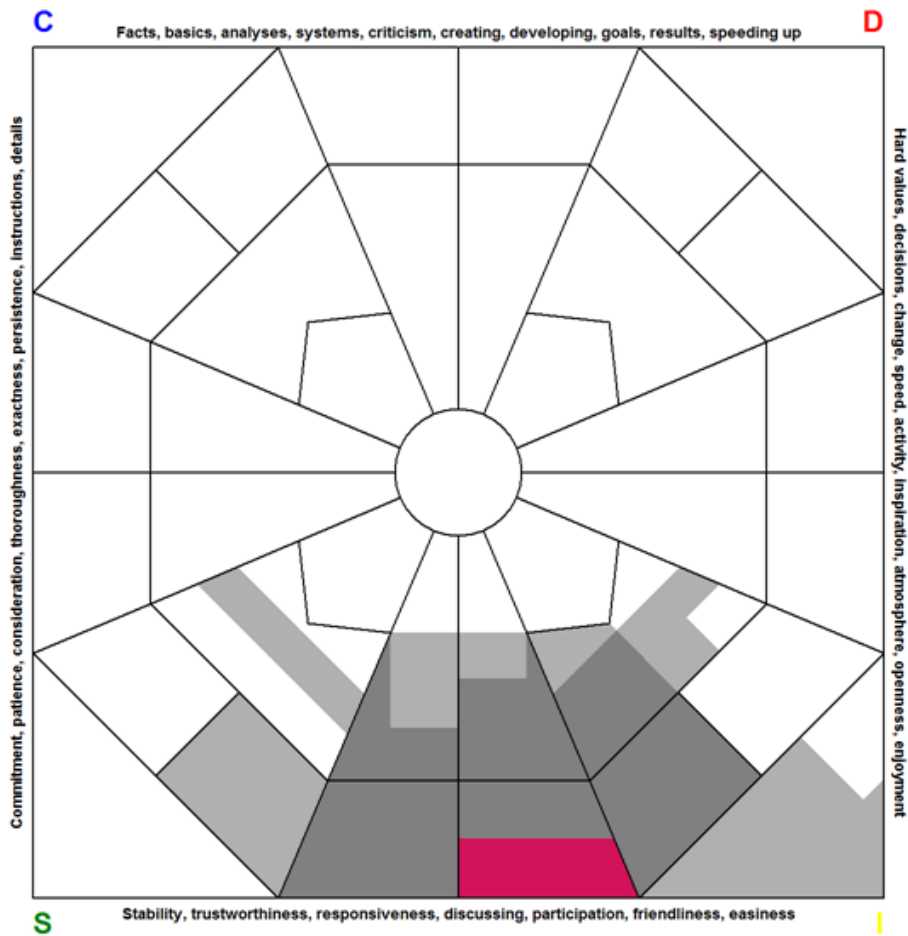
Your DISC style is: IS (I - 50%, S - 50%)

Your DISC Style

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

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.

Your DISC style is: IS (I - 50%, S - 50%)

How Prospects May Perceive You:

Pleasant, calm, well-mannered, thorough, independent, social, emotional, undemanding, sociable, adjustable, open, communicative, easy to approach, kind.

How Prospects May Perceive Your Communication Style:

This person is one of the best conversationalists. She can do and talk about different things without needing to emphasize her ego nor superiority. She can listen and talk about things that interest her partner. She could be more aggressive or bold in expressing her real opinion, otherwise her partner may get the wrong impression about her thinking.

How Prospects May Perceive Your Decision-making:

She cannot be described as a brave nor active decision maker, but she is good at adjusting to others' decisions. She listens to other opinions, then develops a compromise that satisfies others. She does not enjoy roles where her decision determines the well-being of others.

Your Strengths:

- Encourages people to participate
- Looks for ways to increase satisfaction
- Maintains a good atmosphere
- Takes care of all people-relations
- Wants to improve things step-by-step
- Is a solid team member
- Gains trust easily
- Is open yet considerate
- Has the patience to listen as well
- Doesn't want to "rule the world"
- Takes care of her friends
- Also considers the benefits to others

"Knowing yourself is the beginning of all wisdom."

Aristotle

Your Motivators

You tend to like and feel comfortable with these items. Are you taking advantage of comfort areas?

Isabella gets motivation from a secure, people-oriented working atmosphere. She likes discussion, participation, teamwork and listening to others. She values security and stability, also sincere and honest human relationships. She wants to work quite independently inside the guidelines Isabella is given.

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

- Good people relations
- Possibility to help and be useful
- Varying discussions
- Open atmosphere
- Solid encouragement
- Quarrel-free environment
- An independent team
- Happy people
- Working together
- Appreciation as a person
- Peaceful rate of progress
- Aiming for the common good

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

1

2

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

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.

- Losing a good relationship
- Conflicts
- Unpleasant decisions
- Acting against other people
- Inhumanity
- Working alone
- Too detailed instructions
- "Cold" thinking
- Betraying people
- Losing friends
- Uncertainty
- Insecurity about the future

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.

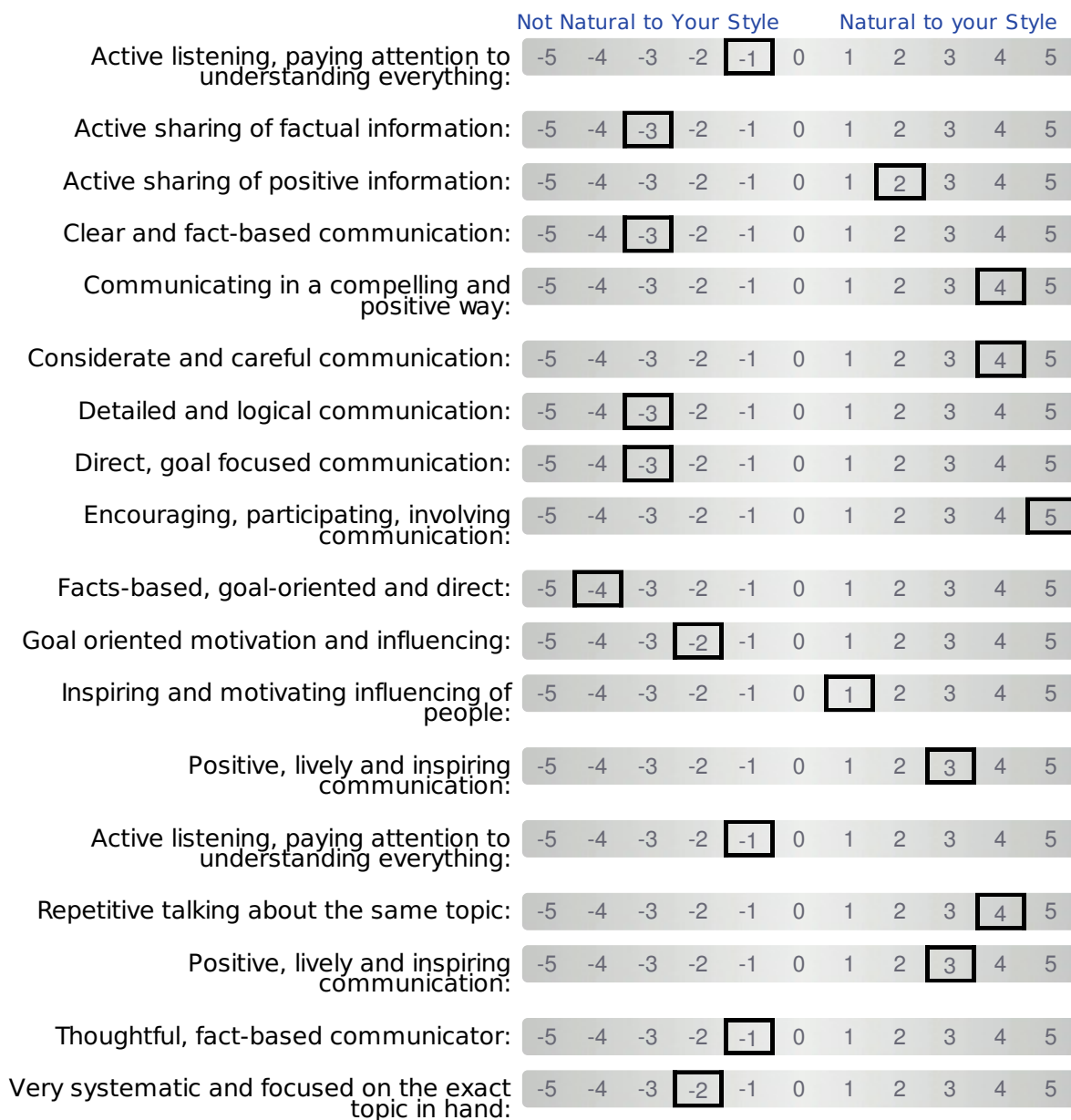
Your Communication Style with Prospects and Clients

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 requiring more energy from you. You **CAN** communicate this way, but it may require more energy and concentration.



	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 comes 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 is one of the best conversationalists. She can do and talk about different things without needing to emphasize her ego nor superiority. She can listen and talk about things that interest her partner. She could be more aggressive or bold in expressing her real opinion, otherwise her partner may get the wrong impression about her thinking.

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

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

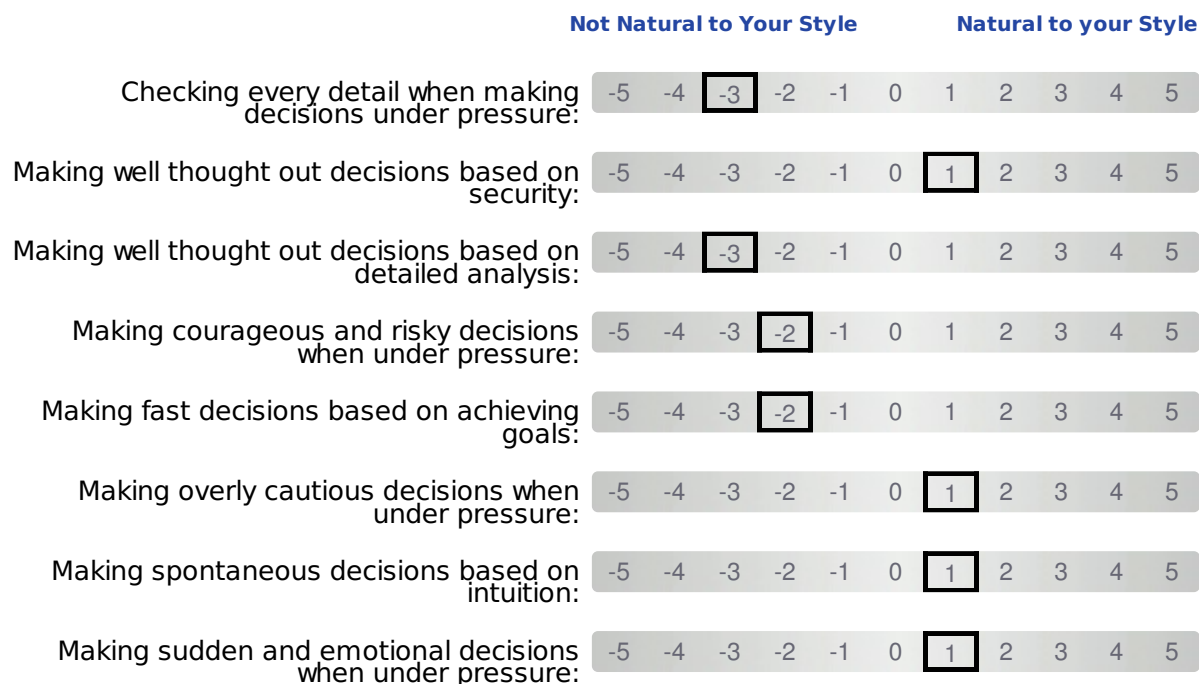
Your Decision-Making Style

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. Listed in the bar graphs below are a few of the most commonly requested decision-making traits.

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 style 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.

She cannot be described as a brave nor active decision maker, but she is good at adjusting to others' decisions. She listens to other opinions, then develops a compromise that satisfies others. She does not enjoy roles where her decision determines the well-being of others.

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

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?

Improving Your Business Development Success

Isabella, below are a few reminders and suggestions on how to further improve your success.

Reminders

- Try to find a common denominator to problems that occur
- Before giving control over the situation to the customer, make it clear what you are trying to accomplish
- Analyze every situation and event
- Define how much you are willing to listen - some customers will talk and talk
- Collect all the possible figures and keep them organized
- Make sure you stick to the topic all the time
- Learn to value and charge for the service you provide

Suggestions of What to Avoid

- Do not promise to do anything that you cannot do
- Be careful not to be too flexible - or at least calculate how much it will cost you
- Do not try to fulfill every wish of every client
- Do not try to help the client - just share the information
- Do not let the customer express too many wishes - you cannot satisfy them all
- Do not make the client dependent on you in any way
- Do not let the client decide



Your Business Development Behaviors

There is no one best Business Development style. However, successful 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.

Isabella, below are a list of Business Development 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 Business Development 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					
Focusing on the next step and how to proceed:	-5	-4	-3	-2	-1	0	1	2	3	4	5
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	5
Courageous expression of own opinions and ideas to a customer:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Developing new ideas and solutions quickly in a sales meeting:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Development & assessment of systematic sales process:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Direct, one-off selling:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Engaging the buyer; relationship selling:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Focusing on building strong, long-term relationships:	-5	-4	-3	-2	-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	4	5
Focusing on the next step in the sales process:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Focusing on winning:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Following a systematic sales process consistently:	-5	-4	-3	-2	-1	0	1	2	3	4	5

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

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 they say it – type of words (e.g. "I" vs. "We"), type of questions (e.g. "what?", "why?")
- body language
- tonality

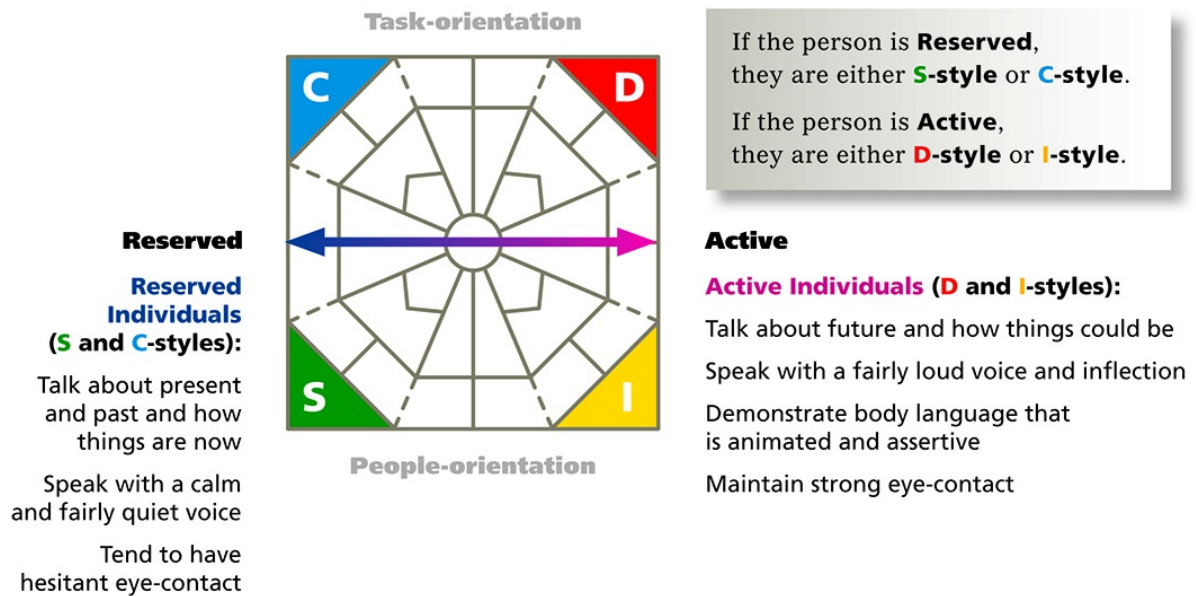
You will discover that observing behaviors will become second nature. Soon you will observe behaviors without thinking.



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.

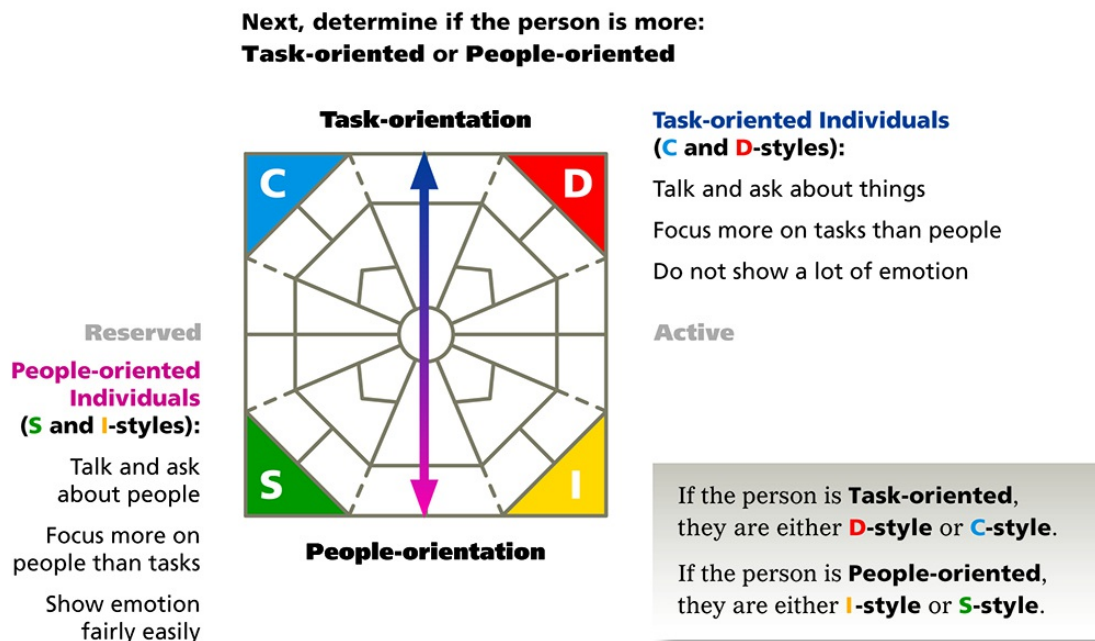
- Talk about future and how things could be
- Speak with a fairly loud voice and inflection
- Demonstrate body language that is animated and assertive
- Maintain strong eye-contact

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



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.

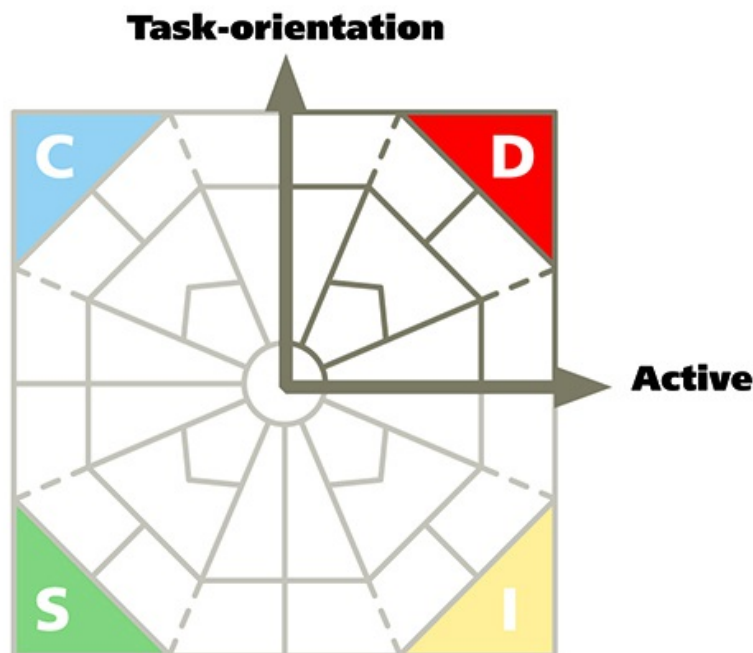
D-style = Active and Task-oriented

This is how to recognize D-styles.

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

How to identify a D-style prospects:

- 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



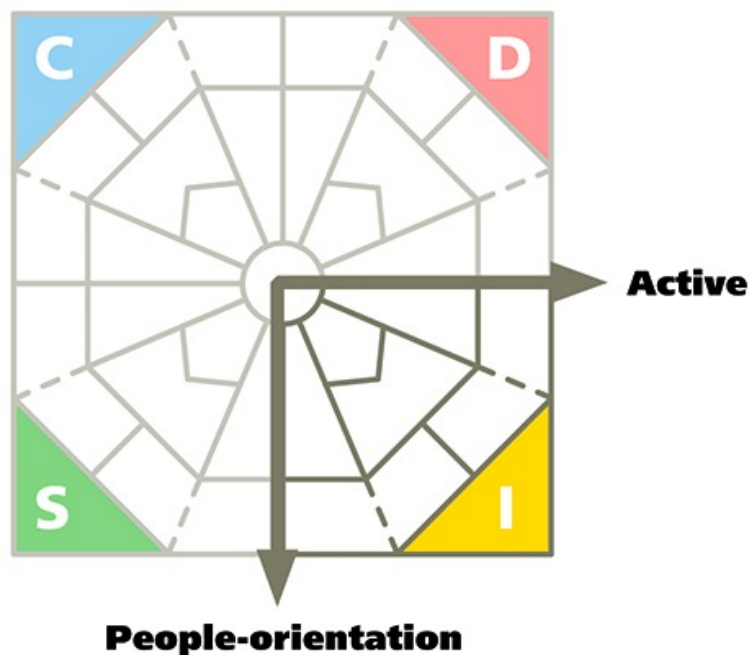
I-style = Active and People-oriented

This is how to recognize I-styles.

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

How to identify an I-style prospects:

- 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



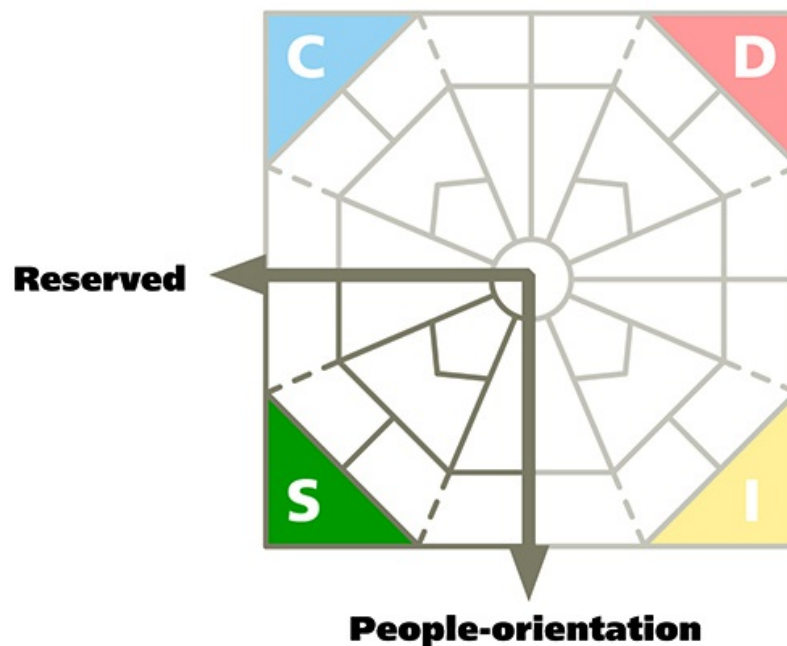
S-style = Reserved and People-oriented

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



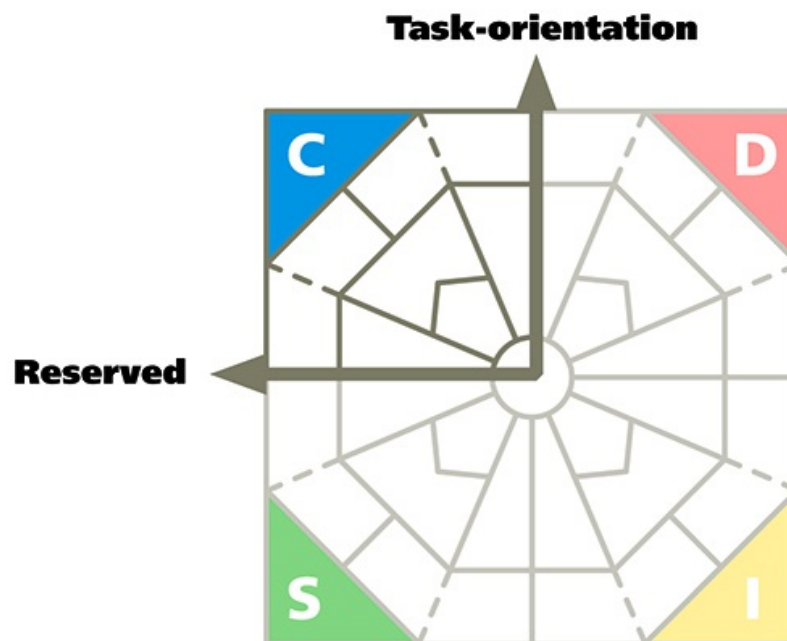
C-style = Reserved and Task-oriented

This is how to recognize C-styles.

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

How to identify a C-style prospects:

- 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

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

- Do not let the discussion leave them wanting more than you are able to provide
- Be concise
- Summarize the main points that you have discussed and agreed upon
- Justify your opinions to them
- Be direct in your statements
- Be very systematic and concise in what you say
- Focus on the topic in your product presentation

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

- Be as direct and honest as possible
- Do not try to please them without a reason
- Make sure that you stay ahead of your competition in the areas that are important to them
- Make them aware that you are ready to defend what you say
- Make sure that they personally succeed because of you
- Make them aware of how you are outside the work environment but do not make it a separate discussion topic
- Make yourself valuable to them

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

- Let them play with ideas but do not allow them to get side-tracked
- Try to avoid the relationship becoming anything but business-based
- Be careful not to talk about something they are not interested in
- Be careful that the conversation does not get side-tracked
- Do not hesitate in whatever you say or do
- Do not be too modest
- Be careful not to be too personal unless they give you permission to be

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

- Explain everything to them so thoroughly that they want to proceed to the next step
- Allow them to realize how they could benefit from the deal
- Show them clearly what benefits they can achieve
- Make a clear connection between what they buy and what they need
- Make them realize what the negative consequence of not buying are
- Appear as a true professional but still make them believe they know something you do not
- Make them believe that there is a rush to make the decision

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

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

- Set an agenda
- Make intermediate summaries and lead the communication
- Do not forget your final goal with the client
- Get to the point but do not talk for long
- Talk briefly and clearly, offering them more opportunities to talk
- Talk about the future
- Show how you both benefit from the sale and have reasons to work together

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

- They trust you more if you let them know when you think they are wrong
- Try to get them to commit to long-term contracts
- Let them always owe you a little
- Always invent something new
- They may talk and have lots of ideas - your duty is to make sure they get what benefits them most
- Make sure that they believe that there is always something they can learn from you
- When you intend to sell them something, tell it to them in advance

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

- Do not believe everything they say - they are good at influencing other people
- Do not forget that having fun does not always equal to getting their business
- Do not let them drift to another topic
- Do not let them to move away from the topic that you want to talk about
- Do not assume a passive role
- Be careful not to talk too much nor focus too much on details
- Do not always provide your service the same way

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

- Do not just believe them, also ensure they have the authority to make the decision
- Let them always owe you a little
- Give them time to decide but set a definite deadline as to how long the offer is valid
- Start agreeing about the next steps immediately after closing the sale
- Get them to sign the deal - do not leave it to their promise to buy
- At the moment of excitement, make sure to actually make a decision on what to do next
- Ask them questions that lead to them saying they will buy

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

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

- Ask definitive questions that allow you to move forward
- Establish and agree on a goal for the meeting
- Agree with them when it is time to take the next step
- Always agree on the next two or three steps before moving forward
- Speed it up as they will not do it
- Listen and understand but then try to solve the challenges
- Create a clear beginning and end to every topic

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

- When communicating with them, have always something extra to add to your service
- Be proactive with them keeping in mind that they need time to prepare
- Be active with them - introduce new ideas
- Spend enough time with them - but not too much
- Create a distant friendship
- Do not always be satisfied with what they say they are happy with - give them more than they expect
- Remember that they expect you to take the active role

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

- Do not leave any open ends
- Do not assume they will take independent action after you are gone
- Do not hesitate to state your opinion
- Do not wait until they make a decision
- Do not allow them to make a decision before you know it is the one you want
- Do not feel that you have to hide something or cannot tell everything
- Avoid being too detailed (keeping in mind you cannot hide anything from them)

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

- Make sure you have an agenda about how to proceed with them and stick to it
- Do not bring up issues that will not move the process forward
- Become friendly with them but on their terms
- Make them say what they want - and give them exactly that
- Tell them ahead of time when you will ask them whether or not they are going to buy
- Ask them what they need to know and have before moving forward
- Tell them logically how things would work

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

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

- Remember to summarize after each topic
- Focus on the business as much as possible
- Do not get too personal - concentrate on the actual topics
- Talk more about the product/service than about them
- Always remain a step ahead and ready for what they are going to ask for next
- Get them to talk by asking question that do not require stating opinions
- Do not let them waver too much after a decision is made

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

- Always provide them with the latest but tested version of your product
- Do not lose your self-confidence in your professional abilities
- Be distant but make regular contacts
- Create additional value for being a customer
- It may become your responsibility to provide follow-up service to ensure that they will actually benefit from your product/service
- Inform them in advance about any unplanned changes to the rules
- Be social, but not superficial, when you talk about the product

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

- Do not allow them to form an opinion - try to keep everything based on facts only
- Do not include too many aspects in one discussion or decision you expect them to make
- Do not bore them by explaining them what they consider basic knowledge
- Do not be too friendly before they allow you to be
- Do not let them control what will happen next
- Do not allow them to get side-tracked - keep things as clear as possible
- Do not forget to provide them with means to calculate what the additional value your product offers them

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

- Ask them to confirm everything step-by-step, detail-by-detail
- Summarize what you have agreed upon
- Concentrate on discussing discounts instead of whether or not they are going to buy
- Give them time but make them believe they lose something if they wait
- Clarify and explain everything so they get bored and want to move forward
- Give them a few options to choose from
- Complete the order form together

Personal Action Plan: Your Next Steps

Experience has shown that by 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 _____



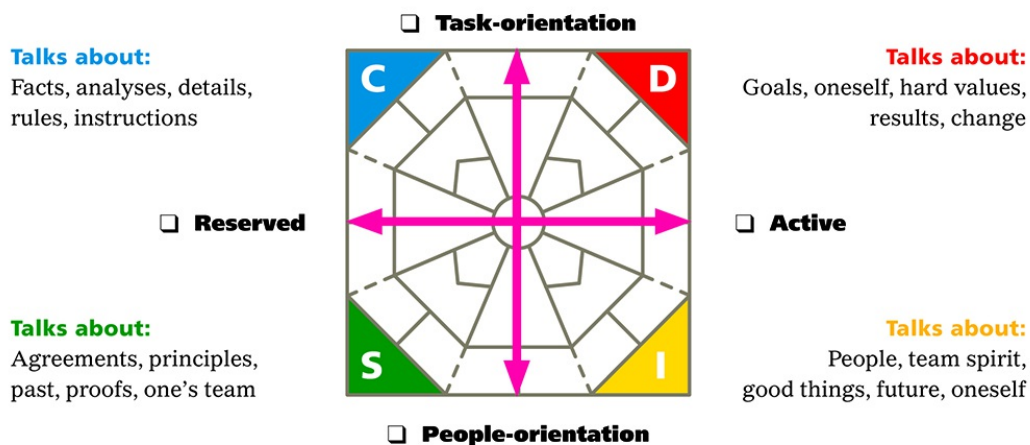
Prospect Action Plan:

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 _____