



# **DISCcert - Sales Report**

**Personalized Report For:  
Sample - ID - Report  
06/01/2017**

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# Introduction to DISC and Your DISCcert Report

## What is DISC?

The DISC Assessment gives us valuable information on how we prefer to communicate with others. It additionally, provides insightful instructions on treating and communicating with others the way they want to be treated. Dr. Tony Alessandra calls this wise counsel - The Platinum Rule®

The DISC assessment is a simple, practical and highly accurate tool that measures behaviors, observable indicators. It first helps us to focus on understanding our own communication styles, and then equally as important, how to enhance communications with others. It does not measure intelligence, values, or performance, but rather encourages us to explore all behavior styles and appreciate the differences.

## DISC History

Let us begin with a brief history of how DISC came to be, and how it has evolved over time. In the early 1920's, Carl Jung outlined the four types of personalities. But, it was Dr. Marston, in 1928, a psychology professor at Columbia University that published what we now refer to as the DISC model of communication behaviors.

Marston's motivation for developing the DISC model came from a desire to be able to measure the emotions of 'normal people'. He believed there was a connection between the energy of behavior and consciousness.

Although Dr. Marston came up with the model, it was Dr. Clarke in 1940 who constructed the first actual DISC Assessment. He named this assessment tool the 'Activity Vector Analysis'. Respondents took the assessment 2 times, first with 'Least' selections, and again with 'Most' selections. Then in the 1950's, Dr. Cleaver figured out a way to combine the process of selection, so the assessment needed only to be administered one time. His assessment was designed so that one must choose one out of four options, creating a 'forced choice' tool.

Dr. John Geier, in the 1970's, a prominent psychologist and professor at University of Minnesota, created the DISC assessment that is used today as the standard for all DISC assessment instruments. His tool updated the assessment terminology, and was designed to be a more user-friendly format. He also renamed the assessment as the "DISC."

Presently, we are now using DISCcert System which continues to focus on patterns of external observable behaviors. You will learn later, that this DISC assessment also incorporates scales of directness and openness for each style, providing additional clarifications.

## Introduction to DISC and Your DISCcert Report Cont.

### DISC Model

The DISC refers to the four core sets of behavior patterns (styles, languages); Dominant, Influence, Steady and Conscientious. The first letter of each of the patterns creates an easy to remember acronym: D I S C. The various combinations of the following four determine our own natural (native) DISC communication style (language.) No combination is better than another.

Each behavior style has a significantly different priority or orientation. Each priority denotes a specific focus that generates personal energy and motivation, and as a result there is a wide variance in the preferences to act.

Behavior Style	Priority	Preference
<b>Dominant</b>	Problem Solving	Prefers making quick decisions
<b>Influence</b>	People Involvement	Prefers to actively engage others
<b>Steady</b>	Plan Development	Prefers systematic approach
<b>Conscientious</b>	Procedures Followed	Prefers to be detailed

### How to Use Your DISC Report

In the next section you will be learning about your own personal DISCcert style. You will read about your style's strengths, as well as opportunities for continuing to develop the ability to flex/stretch/adapt. As you go through your DISCcert report, it is *important* to remember that there is no 'best style'. Each style has its own unique strengths. Many make the mistake of believing that everyone else would be more effective when communicating, if they were just "more like me." Instead, highly effective communications occur when one understands the four core DISC patterns and is willing to adapt their behavior to facilitate clear communications.

Your DISCcert report is not asking you to change who you are, but rather explains how you can capitalize on your strengths as well as modify your actions, in order to meet the needs for whatever communication that is taking place.

If you take the time to truly understand and learn how to use DISC in all your communications, you will increase receptivity, credibility, and most importantly – you will gain more positive outcomes than ever before!

## DISCcert Natural Graph II – Key Points

Style	Focus	Behavior	
		Above Energy Line	Below Energy Line
<b>D</b> .....	Problem Solve.....	Challenges.....	Cautious
<b>I</b> .....	People.....	Connects.....	Courteous
<b>S</b> .....	Plan.....	Consistent.....	Change Oriented
<b>C</b> .....	Procedures.....	Careful.....	Conceptual

### How Your Natural Graph II was Determined

Researchers discovered that people have more clarity around what they LEAST like. For example, if one’s LEAST favorite food is liver, it does not matter when (24/7) or where (Work or Home) you ask them this same question - their answer will be always be liver. Your Natural Graph II is based upon your LEAST selections when you took the DISC Assessment.

### Common Questions and Brief Answers

**What generates the letters listed as my Natural Style?**

All the points above the Energy Line in your Graph II make-up your (Primary) Natural Style.

**Is one Style better than another?**

All Styles are of equal importance. DISC is not a qualitative assessment.

**Will my Natural Graph II change over time?**

Very little. Goal is not to change who you are, but adapt when needed.

**Is my Graph II valid if I have 1 or 2 or 3 points below or above the Energy Line?**

Yes. You do need to have at least 1 point below or 1 point above.

**Can I overuse a style?**

Yes. For best communication results, it is best to learn how to flex your behaviors.

**Can I change my Natural Style?**

No. For example, you cannot change the native language you speak... but, you can develop other language skills, so you can communicate with more people successfully.

**How accurate is the DISCcert Report?**

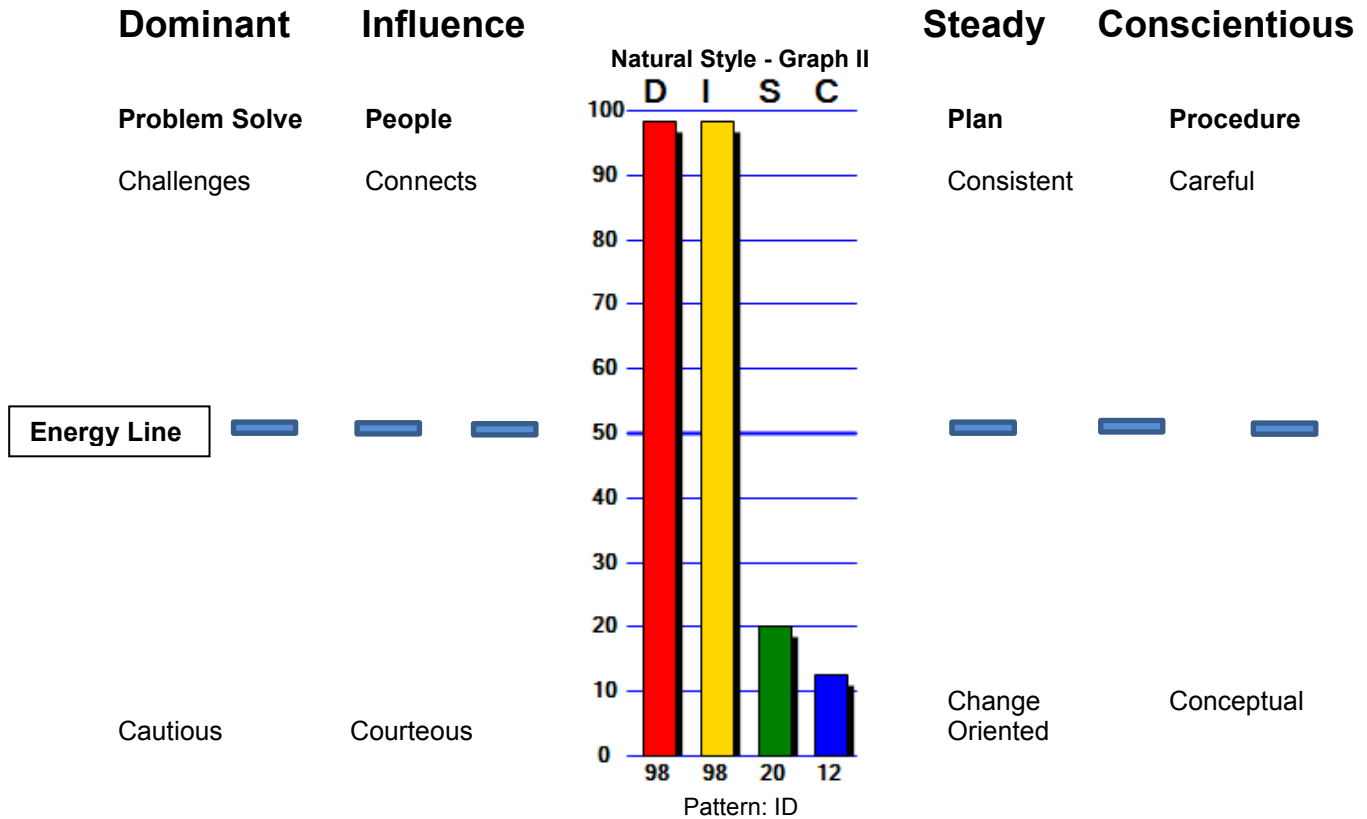
As accurate as the information entered. This is a self-report.

**What does the location of each Style point mean?**

The position of the plotted points determines the style intensity.

## DISCcert Natural eGraph II for Sample - ID - Report

DISC is a Style Assessment, NOT a Skill Assessment.  
 Natural Graph II represents both your 24-7, work & home.  
 Natural Graph II is based on Nature (DNA) & Nurture (society & family) influencers.




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## Your Word Sketch for Your Natural Graph II

Based on your assessment responses, your DISC report has identified characteristics that line-up with your Natural Graph II DISC Pattern. The highlighted words indicate your preference for solving problems, influencing people, developing plans and handling procedures. Note that all your points, whether above or below the Energy Line have positive descriptors. The actual location of each style represents the degree to which you more or less prefer in using when communicating with others.

	<b>D</b>	<b>I</b>	<b>S</b>	<b>C</b>
DISC Focus →	Problem Solve	People	Plan	Procedures
	Competitive Assertive Daring Ambitious Directive Expedient	Demonstrative Enthusiastic Gregarious Intense Optimistic Persuasive	Systematic Stable Patient Peaceful Accommodating Team Player	Accurate Analytical Exacting Factual Precise Logical
	Decisive Risk-taker Goal oriented Pioneering	Expressive Charming Collaborative Sociable	Consistent Cooperative Loyal Supportive	Careful Data Driven Investigates High Standards
	Deliberate Determined Self-reliant Concise	Trusting Confident Friendly Generous	Relaxed Composed Calming Courteous	Focused Detail Oriented Pragmatic Conventional
	Calculated Risks Unassuming Rational Thoughtful	Poised Modest Reserved Subtle	Active Change Oriented Eager Spontaneous	Firm Challenges Self-assured Independent
	Reflective Contemplative Hesitant Seeks Information	Introspective Moderate Restrained Private	Energetic Carefree Vigorous Variety Oriented	Autonomous Open-minded Conceptual Adventurous
	Tentative Prudent Judicious Balanced	Understated Inconspicuous Sympathetic Discreet	Tenacious Energetic Animated Unstructured	Experiments Approximates Exploratory Progressive

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## Create Your DISCcert Summary

The next section provides insights on specific attributes of your DISC Communication Style(s.)

**Recommendation for easy reference for the future:**

As you read the pages listed below, identify 2 that resonate with you the most and list below. You may find it is helpful to share some of your elections with others.

Your General Characteristics (Page 9)\_\_\_\_\_

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Your Strengths (Page 11)\_\_\_\_\_

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Your Work Style Tendencies (Page 11)\_\_\_\_\_

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Your Motivators (Page 12)\_\_\_\_\_

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Your Ideal Work Environment (Page 12)\_\_\_\_\_

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Your Work Oriented Needs (Page 13)\_\_\_\_\_

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Your Potential Areas for Development (Page 13)\_\_\_\_\_

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Your Communication Tips for Others (Page 14)\_\_\_\_\_

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## Your General Characteristics

The narration below serves as a general overview of your behavioral tendencies. It sets the stage for the report which follows, and provides a framework for understanding and reflecting on your results. We've occasionally provided some coaching ideas so that you can leverage your strengths whenever possible to maximize your personal success. *Recommendation for easy reference for the future: Review preferences stated below, identify 2 and list them on page 8, "Create Your DISCcert Summary" page.*

You are poised, confident, and very articulate in front of groups, either large or small. While this is something you are certainly aware of, our coaching would encourage you to leverage this trait to maximize its benefit. The ability to present an idea to a large group is valuable to any organization.

You can be very charming when persuading others in a favorable climate, but also rigid when confronting a hostile situation. Sample -, this can be a two-edged sword, especially if you are required to shift gears quickly from charming to confrontational. Those who score like you may balance this trait successfully by defaulting toward the charming side, but still presenting a firm position. You can object to an idea while maintaining a smile.

Sample -, you tend to be confident and independent; a self-starter with a strong competitive edge. While attention from others is important to you, at times you desire independence from the group. These are not necessarily opposing traits. Your high degree of decisiveness fuels a need to be a trailblazer, leading the way with new ideas. This, in turn, yields the competitive spirit, which then feeds the drive to be a self-starter.

People who score like you tend to make quick and firm decisions. They process information rapidly and often act decisively. Once a decision is made, they usually stick to it and will build a case to support it.

## Your General Characteristics (continued)

Sample -, the responses you gave on the instrument indicate that you project an image of openness and friendliness toward others, even while maintaining self-control. You also have an ability to distance yourself from others when necessary. This assists in helping you to be objective in situations when others may be feeling more emotional, either enthused or reticent. You have the rare ability to step back from a situation and view it unemotionally.

Sample -, you have a high sense of urgency, and a desire to get things done quickly. This urgency may extend to a wide variety of venues, including meetings, events, and even relationships. While this is a strength, sometimes it can be perceived as overly abrupt, or even rude, especially by those who don't share the same urgency. Be sensitive to this, and be flexible enough to soften your approach when necessary.

You can react, adjust, and modify your behavior in a variety of situations. People who score like you have a high degree of perceptiveness, and they use this to guide their own responses, sometimes moment by moment. As the climate lightens, you have the ability to turn up the charm, and as the climate becomes more tense, you are able to take a more matter-of-fact approach.

Your response pattern shows that you have the ability to influence others using both charm and a firm hand in delegating tasks and responsibilities. You have the ability to work hard and play hard, even in the midst of difficult assignments. When the going gets tough for the team, you have the ability to maintain a positive spirit for the group, especially when in front of others. You also have the ability to present firm deadlines, and to make rapid decisions when changes are necessary.

## Your Strengths

You are likely to display your strength characteristics rather consistently. For the most part, these qualities tend to enhance your effectiveness within your organization. *Recommendation for easy reference for the future: Review preferences stated below, identify 2 and list them on page 8, "Create Your DISCcert Summary" page.*

- You are able to make decisions quickly and to take the credit or blame for the outcome of decisions.
- You tend to set high goals, then work hard with people to achieve those goals.
- You are excellent at initiating activity and providing direction for the team or organization.
- You have the ability to use discipline in an appropriate manner, often effecting win-win situations.
- You are a very active agent in all that you do.
- You have excellent presentation skills when dealing with groups. You bring a poised, confident, and engaging message to any audience.
- You demand a high performance from yourself and others.

## Your Work Style Tendencies

The following work style tendencies are positive attributes that you bring to your job as well as team projects. *Recommendation for easy reference for the future: Review preferences stated below, identify 2 and list them on page 8, "Create Your DISC Styles Summary" page.*

- You enjoy working with others and tend to make friends easily on and off the job.
- You approach projects and express ideas with enthusiasm.
- When pressured on the job, you may become more persuadable and less firm in your opinions.
- You appreciate others who show a similar degree of flexibility and spontaneity with organizational projects.
- You are able to maintain a positive public image through a variety of assignments.
- You want to be perceived as trustworthy, and easy work with.
- You tend to evaluate others on the job by their ability to express themselves verbally.

## Your Motivators

Your motivations are largely influenced by your wants. By understanding what uniquely motivates you, it can help you create work situations where you are more apt to be self-motivated. *Recommendation for easy reference for the future: Review preferences stated below, identify 2 and list them on page 8, "Create Your DISCcert Summary" page.*

- A variety of activities involving people, both on and off the job.
- Power, control, and authority to make decisions toward achieving successful results.
- Recognition for your contributions to the success of a project.
- Opportunities to learn, grow, and advance at a rapid pace.
- A trusted support team to assist with detail work and follow-through.
- A supportive and encouraging working environment.
- Awards that recognize ability, skill, or achievements.

## Your Ideal Work Environment

By learning and capitalizing on your motivations, you can be pro-active in creating an environment where you are able to perform at an optimal level. *Recommendation for easy reference for the future: Review preferences stated below, identify 2 and list them on page 8, "Create Your DISCcert Summary" page.*

- Opportunities to try new ideas.
- Authority equal to your responsibility.
- Encouragement to talk about projects and issues openly with peers and managers.
- Ability to see rapid results from your efforts.
- A wide scope of involvement with a variety of people.
- Public recognition of your accomplishments.
- Challenging assignments.

## Your Work Oriented Needs

Your behaviors are also driven by your needs. The more fully your needs are met, the better prepared you are to achieve success. *Recommendation for easy reference for the future: Review preferences stated below, identify 2 and list them on page 8, "Create Your DISCcert Summary" page.*

- To mask strong emotions at times so as not to distance yourself from others.
- To be more aware of your impact on other people, especially in pressure situations.
- Support when dealing with detailed work and repetitive tasks.
- To focus attention and conversation more on the immediate work tasks, and less on socializing.
- Opportunities for leadership, self-development, rapid learning, broad scope of operations, and advancement.
- Systems or utilities to assist in record-keeping or office organization.
- Appreciation for the hard work you bring to the team.

## Your Potential Areas for Development

If you do experience communication struggles, they may be simply the result of overextending your strengths. The following will offer you insights on what you can do to successfully address such challenges. *Recommendation for easy reference for the future: Review preferences stated below, identify 2 and list them on page 8, "Create Your DISCcert Summary" page.*

- You may sometimes take an "ends justify the means" approach.
- You may sometimes intimidate others with power, position, or politics.
- You could increase your sensitivity toward others.
- You may lose interest in a project or initiative once the challenge is gone.
- You may be a selective listener, at times hearing only what you want to hear.
- You could be a bit more willing to share talents in order to help others develop professionally. You may tend to be a bit too self-serving.
- You may become somewhat angry or belligerent when under pressure, or when threatened.

## Your Communication Tips for Others

The following specific suggestions are intended to support you, when you are explaining to others your preferences for communicating. First segment states what you would like others to actively do when interacting with you. The additional segment describes what you would like others to not do, when communicating with you. By discussing this information with others, you are helping them to communicate with you more effectively. *Recommendation for easy reference for the future: Review preferences stated below, identify 2 and list them on page 8, "Create Your DISCcert Summary" page.*

### Actions you would like others to do when communicating with you:

- Motivate and persuade Sample - by pointing out objectives and expected results.
- Stay on track. Hit the major points first, and get to the main point quickly.
- Provide immediate incentives for her willingness to help on the project.
- Put the details in writing, but don't plan on discussing them too much.
- When you disagree, take issue with the methods or procedures, not with the person.
- Plan to talk about things that support her dreams and goals.
- Give Sample - the opportunity to express her opinions and make some of the decisions.

### Actions you would like others not to do when communicating with you:

- Leave decisions hanging in the air. Be certain all decision points have reached closure and action plans are the result.
- Forget or lose things necessary for the meeting or project.
- Don't stick too rigidly to the agenda.
- Speculate wildly without factual support.
- Engage in rambling discussion, and waste her time.
- Leave loopholes or vague issues hanging in the air.
- Confuse or distract her from the issues at hand.

## DISCcert eGraphs for Sample - ID - Report

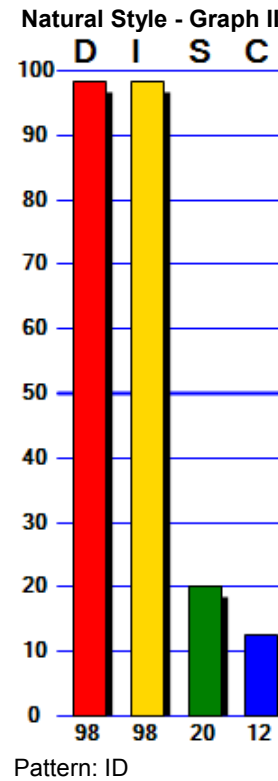
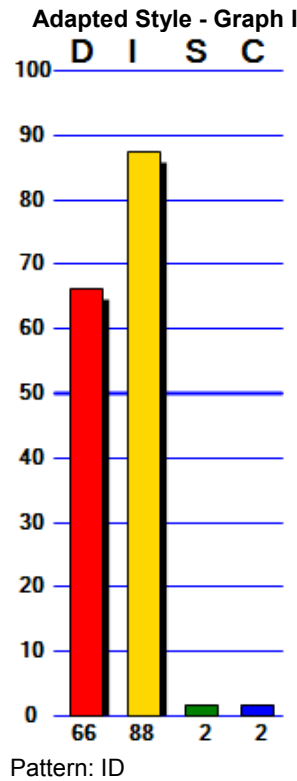
**Adaptive – Graph I**

1 Day at Work

Can change day to day

Your Influencers:  
Role, Responsibilities,  
Who You Relate

Based on your “Most”



**Natural – Graph II**

24-7 Work AND Home

Based on combination:  
Nature (your DNA)  
Nurture (society influencers)

Remains quite constant

Based on your “Least”

### Comparing Your Adaptive (Graph I) and Natural (Graph II)

**If your Adaptive (Graph I) & Natural (Graph II) are similar** then it means then you used your same natural behavioral traits the day at work that you completed the assessment. Your job most likely that day felt in-line with how you would like to be communicating. However, the goal is to not stay in that mode day in and day out, otherwise you are not stretching to accommodate another’s way of communicating.

**If your Adaptive (Graph I) & Natural (Graph II) are different** then it means then the day you took the assessment you needed to adapt/flex/stretch to get the job done. You were willing to use behaviors that are not as comfortable or natural for you.

**Important question - Does this stretch occur occasionally or does it represent a much longer period of time?** If it represents a long period of time, it is helpful to remember that it is requiring more effort to accomplish tasks, which can cause stress. You may want to explore how you could accomplish the same assignment(s), but with an approach that does not entail such prolonged adaptation. If you cannot recall what you were specifically doing that day, think of what job responsibilities might have required you to stretch in such a manner. This can provide you increased understanding as to what you may experience in future situations that necessitate flexing.

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## Your Word Sketch for Your Adaptive Graph I

Based on your assessment “Most” responses, your DISC report has identified characteristics that line-up with your Adaptive Graph I DISC Pattern. The highlighted words indicate what communication behaviors you utilized the day you took the assessment to problem solve, influence people, develop plans and handle procedures. The behavioral traits you demonstrated are influenced by what role, responsibilities and to whom you were relating to.

	<b>D</b>	<b>I</b>	<b>S</b>	<b>C</b>
<b>DISC Focus →</b>	<b>Problem Solve</b>	<b>People</b>	<b>Plan</b>	<b>Procedures</b>
	Competitive Assertive Daring Ambitious Directive Expedient	Demonstrative Enthusiastic Gregarious Intense Optimistic Persuasive	Systematic Stable Patient Peaceful Accommodating Team Player	Accurate Analytical Exacting Factual Precise Logical
	Decisive Risk-taker Goal oriented Pioneering	Expressive Charming Collaborative Sociable	Consistent Cooperative Loyal Supportive	Careful Data Driven Investigates High Standards
	Deliberate Determined Self-reliant Concise	Trusting Confident Friendly Generous	Relaxed Composed Calming Courteous	Focused Detail Oriented Pragmatic Conventional
	Calculated Risks Unassuming Rational Thoughtful	Poised Modest Reserved Subtle	Active Change Oriented Eager Spontaneous	Firm Challenges Self-assured Independent
	Reflective Contemplative Hesitant Seeks Information	Introspective Moderate Restrained Private	Energetic Carefree Vigorous Variety Oriented	Autonomous Open-minded Conceptual Adventurous
	Tentative Prudent Judicious Balanced	Understated Inconspicuous Sympathetic Discreet	Tenacious Energetic Animated Unstructured	Experiments Approximates Exploratory Progressive

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## Overview of the Four Basic DISCcert Styles

Here is additional clarification for each of the four basic DISC styles.

- Descriptors for high points for each of the styles. Preference oriented, not Performance.
- Each style is identified by its unique orientations as well as its contrasting preferences.

	High <b>Dominant</b> Style	High <b>Influence</b> Style	High <b>Steady</b> Style	High <b>Conscientious</b> Style
<b>Orientation</b>				
<b>Pace Priority</b>	Quick/Decisive Task/Goal	Quick/Spontaneous People/Interact	Deliberate/Relaxed People/Relationships	Deliberate/Detailed Task/Accuracy
<b>Characteristics</b>				
<b>Strengths</b>	Pioneering Leadership Administration	Motivating Persuading Entertaining	Teamwork Listening Follow-through	Structured Thoroughness High Standards
<b>Workplace</b>	Efficient	Busy	Functional	Formal
<b>Outcomes</b>				
<b>Seeks</b>	Productivity Control Results	Participation Recognition Playfulness	Acceptance Friendship Cooperation	Precision Facts Quality
<b>Stressors</b>				
<b>Irritations</b>	Indecision Incompetence	Routines Complexity	Insensitivity Impatience	Disorganization Impropriety
<b>Fears</b>	Losing	Rejection	Sudden Changes	Work Criticized
<b>Growth Areas</b>	Poor Listener	Short Attention Span	Hesitant to Speak-up	Perfectionist
<b>May Become</b>	Authoritative	Sarcastic	Submissive	Withdrawn

### Key points to remember

- All DISC styles are of equal importance.
- Points above the Energy Line are “not better” than points below.
- No one style nor combination of styles is better than another.

## DISC Style Examples



### Non-Verbal Communications of a D

- Handshake - Firm and not held long
- Gestures - Used to speed things up
- Eye Contact - Have strong eye contact if they are listening to you
- Posture - Alert, ready for action
- Sitting - When sitting...sits "up"
- Walking - Typically walks quickly from point A to point B
- Stance - Hands on hips or arms crossed



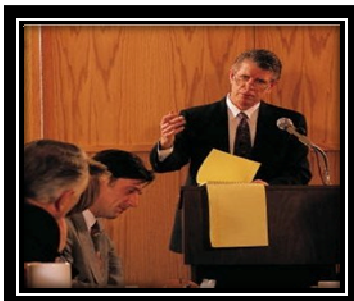
### Non-Verbal Communications of an I

- Handshake - Communicates "Happy to see YOU!"
- Gestures - Animated. Uses hands to emphasize a point.
- Eye Contact - Looks steadily and intensely to engage you.
- Posture - Anticipating your response.
- Sitting - Perched and ready to act.
- Walking - Energetic pace.
- Stance - Surveying for next opportunity.



### Non-Verbal Communications of a S

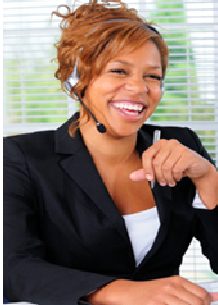
- Handshake - Solid, but friendly
- Gestures - Minimal
- Eye Contact - Direct without being intense
- Posture - Relaxed and neutral
- Sitting - Comfortable, composed
- Walking - Head slightly looking down, to see where they are going.
- Stance - Calm, stable



### Non-Verbal Communications of a C

- Handshake - Formal
- Gestures - Deliberate
- Eye Contact - Sparse
- Posture - Closed
- Sitting - Prefers distance between you
- Walking - Detached and quiet
- Stance - Contemplative

## DISC Style “Name that Style” Worksheet



**Conversation:** Opens with informal message.  
**Example:** *"Hi Ruth, its Sarah – I'm thrilled with the decision!"*  
**Pace:** Spontaneous, speaks rapidly.  
**Tone:** Enthusiastic, optimistic, and inspirational.  
**Example:** *"I've a great idea. Let's chat over lunch!"*

**Focus:** Builds alliances, generates ideas, expressive.  
**Power Cues:** Awards on wall. Loves to talk on the phone.  
**Example:** *"I'm calling to say thank you again for ..."*

What style is **Sarah**?

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**Conversation:** Opens with a formal, factual message.  
**Example:** *"This is Mr. Hall, calling regarding the AR account."*  
**Pace:** Cautious, procedure-driven, and analytical.  
**Tone:** Controlled logical, listens and then asks why.  
**Example:** *"Please follow the timeline exactly as it is."*

**Focus:** Procedures, accuracy, quality.  
**Power Cues:** Reference materials are sequenced.  
**Example:** *"We will ship the parts when they are correct."*

What style is **Mr. Hall**?

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**Conversation:** Opens with a personal greeting.  
**Example:** *"Hello Susan, this is Peter. How are you today?"*  
**Pace:** Methodical, process-driven, contemplative.  
**Tone:** Friendly, compassionate & soft-spoken.  
**Example:** *"Like to schedule 15 minutes with you to discuss.."*

**Focus:** Relationships, natural listeners.  
**Power Cues:** Family photos, mementos, & serene pictures.  
**Example:** *"Joe, if you need help on editing, just let me know."*

What style is **Peter**?

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**Conversation:** Charges right into issue.  
**Example:** *"Market's going down – oh,...how are you?"*  
**Pace:** Fast & abbreviated.  
**Tone:** All business, confident, challenging.  
**Example:** *"Ryan? Susan. Bob there?"*

**Focus:** Solve problems...quickly!  
**Power Cues:** Determines time & place of meetings.  
**Example:** *"I'll call you at 3:00 PM tomorrow."*

What style is **Susan**?

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## **DISCcert – Strategies for Adapting**

Adaptability is important to all successful relationships.

### **Adaptability concerns the way you manage your own behaviors.**

It is your willingness and ability to adjust your approach or strategy based on the particular needs of the situation or relationship at a particular time. It's something applied more to yourself (to your patterns, attitudes and habits) than to others.

No one style is naturally more adaptable than another. For any situation, the strategic adjustments that each style needs to make will vary. The decision to employ specific adaptability techniques is made on a case-by-case basis: you can choose to modify how you communicate with one person, and not so with others. You can choose to be quite flexible with one person today and less flexible with that same individual tomorrow.

### **What adaptability looks like in short and long term.**

You practice adaptability each time you slow down for a **C** or **S** style; or when you move a bit faster for the **D** or **I** styles. It occurs when the **D** or **C** styles take the time to build the relationship with an **S** or **I** style; or when the **I** or **S** styles focus on facts or get right to the point with **D** or **C** styles. It means adjusting your own behavior to make other people feel more at ease with you and the situation.

Adaptability does not mean “imitation” of the other person’s style. It does mean adjusting your openness, directness, pace, and priority in the direction of the other person’s preference, while maintaining your own identity.

A person who maintains high adaptability in all situations may not be able to avoid stress and inefficiency. There is also the danger of developing tension from the stress of behaving in a “foreign” style. Usually, this is temporary and may be worth it if you gain rapport with others. At the other end of the continuum, no adaptability would cause others to view someone as rigid and uncompromising because they insist on behaving according to their own natural pace and priority.

### **Benefits of adapting.**

Effectively adaptable people meet other people’s needs and their own. Through practice, they are able to achieve a balance: strategically managing their adaptability by recognizing when a modest compromise is appropriate, or when the nature of the situation calls for them to totally adapt to the other person’s behavioral style, so they do so. Adaptable people know how to negotiate relationships in a way that allows everyone to win. They are tactful, reasonable, understanding, and non-judgmental.

Your adaptability level influences how others judge their relationship with you. Raise your adaptability level and trust and credibility go up; lower your adaptability level and trust and credibility go down. Adaptability enables you to interact more productively with difficult people and helps you to avoid or manage tense situations. With adaptability you can treat other people the way THEY want to be treated.

## Communication Tips

### Communication Tips with the **Dominant** Style

#### D - Behaviors

#### Communication Tips to Use with a D

Competitive	Offer solutions
Think logically	Display reasoning
Want facts and highlights	Provide concise data
Strive for results	State Advantages
Like personal choices	Present concrete options
Like changes	Include most current, profitable trends
Goal oriented	Get to the point quickly
Prefer to debate	Be prepared to be challenged
Need to be in charge	Recommend action plan

### Communication Tips with the **Influencing** Style

#### I - Behaviors

#### Communication Tips to Use with an I

Likes recognition for job well done	Provide timely compliments and genuine appreciation
Seek enthusiastic people and situations	Be optimistic and provide positive comments
Expresses emotions	Acknowledge their feelings when possible
Want to know the general expectations	Focus on their role in the "big picture," rather than details
Likes to be involved and included	Include in brainstorming sessions
Like changes and innovations	Offer new ideas and ask for their opinion
Look for action and stimulation	Keep up a fast, lively pace
Spontaneous and demonstrative	Allow time for them to describe and explain
Builds positive alliances	Incorporate their alliances when discussing solutions

## Communication Tips Continued

### Communication Tips with the **Steady** Style

#### S - Behaviors

#### Communication Tips to Use with a S

Concerned with stability	Show how your idea minimizes risk
Think systematically	Show step-by-step reasoning for a plan
Enjoy teamwork	Acknowledge their support and follow-through
Authentic relationships important	Demonstrate your sincere interest in them
Prefer to know step-by-step sequence	Review with them in person the outline and instructions
Look for calmness and peace	Contribute to a relaxing, friendly atmosphere
Avoid risks and changes	Give them advance notice and/or personal assurances
Dislike conflict	Focus on common interest
Offer opinion after assessing issue	Provide written information first, then ask for opinion

### Communication Tips with the **Conscientious** Style

#### C - Behaviors

#### Communication Tips to Use with a C

Like to contemplate	Tell them “why” and “how
Think logically	Show your reasoning with pros and cons
Seek facts	Give data to them in writing
Need to know the rationale	Provide detailed explanations and documentation
Prefer time to process	Expect them to request time to research before deciding
Be prepared with correct information	Provide them questions in writing prior to discussion
Focus on accuracy	Acknowledge in writing their contributions
Values credibility	Do your homework on topic, before scheduling a meeting
Avoid conflict	Tactfully ask for clarification and assistance you may need

# DISCcert - Case Scenarios

## Instructions:

As you read each of the following four scenarios you will be introduced to a new hypothetical co-worker. You will receive a brief explanation of their communication interactions, providing you with clues so you can determine their Natural (Graph II) Style. Then you will discover the communication challenge you are being asked to resolve. (See prior two pages, on Communication Tips, for helpful suggestions.)

### Case Study #1

Sam is tremendously objective, brings stability to any work group and is well-disciplined. If Sam says he is going to get something done by a certain time, it is done with quality in mind and done on time (often finished prior to deadline.) He is very dependable, good listener and remains calm under pressure. However, when deadlines get moved-up, some think he does not display a sense of urgency that is necessary to win.

You just found out that your deadline was moved-up two weeks. You know that will have an impact on Sam's deadline too.

Sam's prominent DISC style? \_\_\_\_\_ Your communication strategy with Sam? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Case Study #2

Chris likes to do things the correct way the first time. Prefers structure and controls set in place. She does not like surprises; therefore, may develop complex plans to prevent them. May be seen as cool and aloof by others because of her private nature. She can be overly critical of herself and expects others to adhere to correct protocol. Chris is pragmatic and may resist change unless given reasons.

You have worked on the same team with Chris for 6 months and have mutual respect for one another's work. Yesterday you discovered another process that could cut your workload in half, without sacrificing quality. You believe Chris would benefit too.

Chris's prominent DISC style? \_\_\_\_\_ Your communication strategy with Chris? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## DISCcert - Case Scenarios Continued

### Instructions:

As you continue to read each of the following scenarios you will be introduced to a new hypothetical co-worker. You will receive a brief explanation of their communication interactions, providing you with clues so you can determine their Natural (Graph II) Style. Then you will discover the communication challenge you are being asked to resolve. (See prior pages, on Communication Tips, for helpful suggestions.)

### Case Study #3

Igor prides himself in generating enthusiasm amongst his teammates when a new project has been assigned and has less motivation when it comes to doing all the detailed work. He is quite gregarious and likes to get results by working with others. He's usually very optimistic, but his timelines are not always realistic.

You have run into an unexpected work obstacle and have spent the last 2 unproductive hours trying to resolve. You think Igor has prior experience that could help, but are also aware he is behind in his own deadlines.

Igor's prominent DISC style? \_\_\_\_\_ Your communication strategy with Igor? \_\_\_\_\_

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### Case Study #4

Doris is highly ambitious, seen as a risk-taker and is always looking for a new challenge. She is very goal oriented and can display a very short attention span. Her fast pace has caused some frustration with co-workers. Doris prefers to get to the point and move onto the next action item.

The two of you have been on a planning committee for a month. In each of the planning meetings Doris has been very vocal and quick to rejected your recommendation for a new software program.

Doris's prominent DISC style? \_\_\_\_\_ Your communication strategy with Doris? \_\_\_\_\_

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# DISCcert – The Whole Picture

How can you effectively recognize another person’s Behavioral Style?

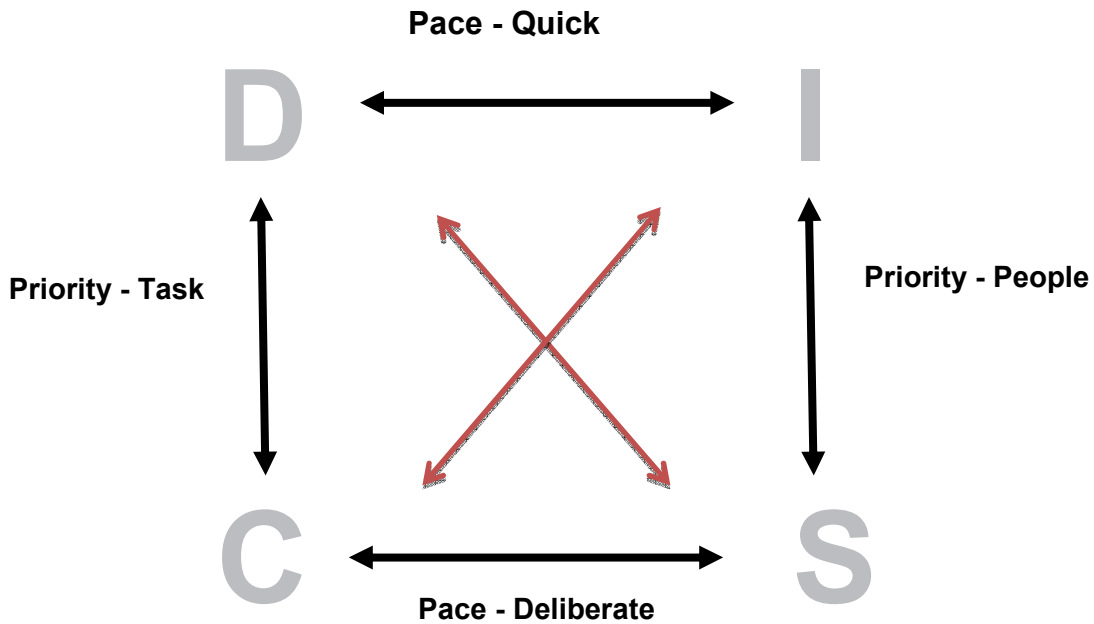
## Ask 2 Key Questions

**1. What is their Pace when communicating with others?**

If they are more apt to be Quick .....then D or I fits.  
 If they are more apt to be Deliberate ...then S or C fits.  
 Pace is the 1<sup>st</sup> predictor of style.

**2. What is their Priority when communicating with others?**

If it is more apt to be Task .....then D or C fits.  
 If it is more apt to be People .....then I or S fits.



**Combining Pace and Priority behaviors creates each of the four behavioral styles.**

- Dominance exhibits -- Pace that is Quick and Priority that is Task.
- Influence exhibits – Pace that is Quick and Priority that is People.
- Steady exhibits – Pace that is Deliberate and Priority that is People.
- Conscientious exhibits – Pace that is Deliberate and Priority that is Task.



**Styles that typically require more adapting to one another.**

## DISC Style “Email Decoding” Worksheet

Here is one message written in each of the four DISC styles. Use the criteria below to determine the style of each email. Write an email response for each one.

	<b>D</b>	<b>I</b>	<b>S</b>	<b>C</b>
<b>Greeting?</b> .....	Purpose.....	Happy.....	Friendly.....	Formal
<b>Formatted?</b> .....	Brief .....	☺, Colors .....	Methodical.....	Detailed
<b>Word Choice?</b> ..	Notification .....	Party.....	Productive.....	Serious

### Email #1

Subject: Planning Meeting Invitation

Hello Sam,

I would like to invite you to attend the planning meeting on Tuesday, October 15<sup>th</sup> on the second floor, the small conference room. I know you have a busy schedule, so I want to extend my appreciation for your time. The meeting starts @ 9:00 a.m. and ends @ 12:30 p.m. Please bring your reports, to help ensure this is highly productive meeting.

I look forward to seeing you on October 15<sup>th</sup> and working together to increase success for all of us. Please do not hesitate to call me @ [ext 43](#).

Warm Regards,  
Sarah Smith  
Customer Care Department

**Sarah Smith’s Natural Style:** \_\_\_\_\_

**Your Email Response:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Email #2

Subject: Planning Meeting with Food! ;-)

**Hi Everyone!**

*I am so excited that we will all be working together on the planning committee!* I scheduled it on Tues, Oct 15 from 9-12:30 (yes, there will be plenty of coffee in the morning and a great lunch at the end ;-)  
We'll be on the second floor – [sm](#) conference rm. This will be our first meeting and I know you'll all make it a huge success, with all the talent and experience you bring! I know several of you have some excellent materials to share – that's great. We'll have plenty of time to hear from everyone.

Thrilled you're a part of this new planning committee!  
(We could come up with a special name for our committee too!)  
See you on Oct 15! 🙏 Thanks so much ☺  
Isabel,  
Customer Care [Dept](#)

**Isabel’s Natural Style:** \_\_\_\_\_

**Your Email Response:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# DISC Style “Email Decoding” Worksheet Continued

Use criteria below to determine the style of each email. Write an email reponse for each one.

	<b>D</b>		<b>I</b>		<b>S</b>		<b>C</b>
<b>Greeting?</b> .....	Purpose.....	Happy.....	Friendly.....	Formal			
<b>Formatted?</b> .....	Brief .....	☺, Colors .....	Methodical.....	Detailed			
<b>Word Choice?</b> ..	Notification .....	Party.....	Productive.....	Serious			

### Email #3

Subject:	Planning Meeting Annoucement
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Attention Planning Committee:

The Planning Committee will be meeting on Tuesday, October 15 on the second floor in the smaller of the two Conference rooms. The meeting will begin @9:00 A.M. PST and conclude at 12:30 P.M. PST.

The agenda for the meeting is as follows:

1. Current status of our customer care process.
2. Proposal presentations (send your PowerPoints slides by October 1).
3. Sub-committee assignments and timelines.

We will commence our meeting on time @ 9:00 A.M. and conclude @ 12:30 P.M.

Regards,  
Carlton Cornick  
Customer Care Agent

**Carlton Cornick’s Natural Style:** \_\_\_\_\_

**Your Email Response:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Email #4

Subject	Planning Committee
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Planning Committee

~~Mtg~~ Oct 15 – 2<sup>nd</sup> floor – ~~sm~~ conference  
9 – 12:30

We will start on time  
D. Dacron

**D Dacron’s Natural Style:** \_\_\_\_\_

**Your Email Response:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## How to Modify Your Pace and Priority

**In some interpersonal situations, you will only be able to identify another person’s Pace or Priority, but not both.** In these situations, you need to know how to practice adaptability, one behavioral dimension at a time. With that in mind, let’s look at what you can do to modify YOUR level of Directness or Openness before looking at specific guidelines for being more adaptable with each of the four styles.

### Pace

#### To Increase being Quick

- Speak, move and make decisions faster
- Initiate conversation and decisions
- Give recommendations
- Use direct statements vs roundabout questions
- Use a strong, confident voice
- If disagree, challenge with tact
- Increase your eye contact

#### To Increase being Deliberate

- Talk, walk and make decisions more slowly
- Seek and acknowledge others’ opinions
- Share decision-making
- Listen and do not interrupt
- Include pauses when speaking with others
- Refrain from criticizing or acting pushy
- When disagreeing, choose words carefully

### Priority

#### To Increase People Orientation

- Give the person your undivided attention
- Be willing to digress from the agenda
- Pay personal compliments
- Use friendly language
- Respond to the expression of others’ feelings
- Take time to develop the relationship
- Share feelings and show more emotion

#### To Increase Task Orientation

- Get right to the task – the bottom line
- Maintain more of a logical, factual orientation
- Keep to the agenda
- Do not waste the other person’s time
- Do not initiate physical contact
- Minimize your enthusiasm and body movement
- Use businesslike language

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# Action Plans for All Four Styles - Worksheet

## Instructions

- Determine a co-worker’s DISC Style, based on 2 behavior (characteristic) sets you observe.  
 What is their Pace when communicating with others? If more apt to be Quick then D or I fits.  
 If more apt to be Deliberate then S of C fits.  
  
 What is their Priority when communicating with others? If more apt to be Task then D or C fits.  
 If more apt to be People then I or S fits.
- Add a  by “Characteristics” that match your co-worker.
- Add an  by (Communication) “Tips for Others” you currently use with your selected co-worker.
- Insert a  around the remaining “Tips for Others.” You now have your overall Action Plan.
- Add a  by one of the “Tips for Others” you will first apply.

<b>Dominant</b> (Quick/Task)		<b>Influence</b> (Quick/People)	
Characteristics	Tips for Others	Characteristics	Tips for Others
<input type="checkbox"/> Competitive	<input type="checkbox"/> Offer Solutions to Win	<input type="checkbox"/> Expressive	<input type="checkbox"/> Acknowledge Ideas
<input type="checkbox"/> Strategic	<input type="checkbox"/> Display Reasoning	<input type="checkbox"/> Optimistic	<input type="checkbox"/> Discuss Solutions
<input type="checkbox"/> Bottom-line	<input type="checkbox"/> Provide Concise Data	<input type="checkbox"/> Builds Alliances	<input type="checkbox"/> Schedule joint Mtgs
<input type="checkbox"/> Goal oriented	<input type="checkbox"/> Offer Projected Results	<input type="checkbox"/> Be Involved	<input type="checkbox"/> Include from Start
<input type="checkbox"/> Debates	<input type="checkbox"/> Be Prepared with Facts	<input type="checkbox"/> Likes Change	<input type="checkbox"/> Offer New Ideas
<input type="checkbox"/> Be in Control	<input type="checkbox"/> Present Action Plan	<input type="checkbox"/> Appreciates Recognition	<input type="checkbox"/> Provide Compliments
<input type="checkbox"/> Assertive	<input type="checkbox"/> Anticipate Questions	<input type="checkbox"/> Spontaneous	<input type="checkbox"/> Ask their Opinion

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<b>Conscientious</b> (Cautious/Task)		<b>Steady</b> (Cautious/People)	
Characteristics	Tips for Others	Characteristics	Tips for Others
<input type="checkbox"/> Think Logically	<input type="checkbox"/> Provide Rationale	<input type="checkbox"/> Stability Focus	<input type="checkbox"/> Provide Assurances
<input type="checkbox"/> Seek Facts	<input type="checkbox"/> Give Written Data	<input type="checkbox"/> Dependable	<input type="checkbox"/> Offer Written
<input type="checkbox"/> Focus on Accuracy	<input type="checkbox"/> Show Due Diligence	<input type="checkbox"/> Methodical	<input type="checkbox"/> Provide a Plan
<input type="checkbox"/> Values Creditability	<input type="checkbox"/> Be Prepared	<input type="checkbox"/> Enjoy Teamwork	<input type="checkbox"/> Be Sincere
<input type="checkbox"/> Like to Contemplate	<input type="checkbox"/> Build in Extra Time	<input type="checkbox"/> Look for Calmness	<input type="checkbox"/> Show Composure
<input type="checkbox"/> Analytical	<input type="checkbox"/> Offer Pros and Con	<input type="checkbox"/> Express after Assessing	<input type="checkbox"/> Give Advance Notice
<input type="checkbox"/> Follows Protocol	<input type="checkbox"/> Provide Documentation	<input type="checkbox"/> Cooperative	<input type="checkbox"/> Be Courteous

### Your Action Plan:

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## How to Adapt to the **Dominant Style**

They are time-sensitive; so do not waste their time. Be organized and get to the point. Give them relevant information and options, with probabilities of success. Give them written details to read at their leisure — all on a single page.

The Dominant Styles are goal-oriented, so appeal to their sense of accomplishment. Appeal to their desire to be number one, by supporting their ideas and acknowledge their power and prestige where appropriate. The D Style wants to make decisions. If you disagree, argue with facts, not feelings. In groups, allow them to have their say because they are not the type who will take a back seat to others.

With the Dominant Style, in general, be efficient and competent.

### At Work, Help them To...

- More realistically gauge risks
- Exercise more caution and deliberation before making decisions
- Follow pertinent rules, regulations, and expectations
- Recognize and solicit others' contributions
- Tell others the reasons for decisions
- Cultivate more attention/responsiveness to emotions

### Sales and Service Strategies...

- Plan to be prepared, organized, fast-paced, and always to the point
- Meet them in a professional and businesslike manner
- Learn and study their goals and objectives – what they want to accomplish, how they currently are motivated to do things, and what they would like to change
- Suggest solutions with clearly defined and agreed upon consequences as well as rewards that relate specifically to their goals
- Get to the point
- Provide options and let them make the decision, when possible

### In Social Settings...

- Let them know that you do not intend to waste their time
- Convey openness and acceptance of them
- Listen to their suggestions
- Summarize their achievements and accomplishments
- Give them your time and undivided attention
- Appreciate and acknowledge them when possible

## How to Adapt to the **Influencing Style**

The Influencing Styles thrive on personal recognition, so pour it on sincerely. Support their ideas, goals, opinions, and dreams. Try not to argue with their optimistic aspirations and visions; get excited about them.

The I Styles are energized by motivating and inspiring others. A strong presence, stimulating and entertaining conversation, jokes, and liveliness will win them over. They are people-oriented, so give them time to socialize. Avoid rushing into tasks.

With the Influencing Styles, in general, be interested in *them*.

### At Work, Help Them To...

- Prioritize and organize
- See tasks through to completion
- View people and tasks more objectively
- Avoid overuse of giving and taking advice
- Write things down

### Sales and Service Strategies...

- Show that you're interested in them, let them talk, and allow your animation and enthusiasm to emerge
- Take the initiative by introducing yourself in a friendly and informal manner and be open to new topics that seem to interest them
- Support their dreams and goals
- Illustrate your ideas with stories and emotional descriptions that they can relate to their goals or interests
- Clearly summarize details and direct these toward mutually agreeable objectives and action steps
- Provide incentives to encourage quicker decisions
- Give them testimonials

### In Social Settings...

- Focus on a positive, upbeat, warm approach
- Listen to their personal feelings and experiences
- Respond openly and congenially
- Avoid negative or messy problem discussions
- Make suggestions that allow them to look good
- Don't require much follow-up, detail or long-term commitments
- Give them your attention, time and presence

## How to Adapt to the **Steady Style**

They are relationship-oriented and work very well in teams. Take things slow, earn their trust, support their feelings, and show sincere interest. Talk in terms of feelings, not facts. The S Styles do not want to upset status quo. They want to be assured that everyone will approve of them and their decisions. Give them time to solicit co-workers' opinions.

Never back a Steady Style into making an on the spot decision. Be systematic and well prepared prior to meeting with them.

With the Steady Style, in general, be non-threatening and sincere.

### At Work Help Them To...

- Utilize shortcuts and discard unnecessary steps
- Track their growth
- Avoid doing things the same way
- Realize there is more than one approach to tasks
- Become more open to some risks and changes
- Feel sincerely appreciated
- Speak up and voice their thoughts and feelings
- Modify their tendency to automatically do what others tell them
- Get and accept credit and praise, when appropriate

### Sales and Service Strategies...

- Get to know them more personally and approach them in a non-threatening, pleasant, and friendly, but professional way
- Develop trust, friendship, and credibility at a relatively slow pace
- Ask them to identify their own emotional needs as well as their task or business expectations
- Get them involved by focusing on the human element... that is, how something affects them and their relationships with others
- Avoid rushing them and give them personal, concrete assurances, when appropriate
- Communicate with them in a consistent manner on a regular basis

### In Social Settings...

- Focus on a slower-paced, steady approach
- Avoid arguments and conflict
- Respond sensitively and sensibly
- Privately acknowledge them with specific, believable compliments
- Show them step-by-step procedures
- Behave pleasantly and optimistically
- Give them stability and minimum of change



## How to Adapt to the **Conscientious** Style

They are time-disciplined, so be sensitive to their schedules. They need details, so give them data. They are task-oriented; so do not expect to become their friend before working with them. Friendship may develop later, but, unlike the Influencing Styles, it is not a prerequisite.

Support the Conscientious Styles in their organized, thoughtful approach to problem solving. Be logical, and exacting with them. Give them time to make decisions and work independently. Allow them to talk in detail. In work groups, do not expect the C Styles to be leaders or outspoken contributors, but do rely on them to conduct research, crunch numbers, and perform detailed footwork for the group. If appropriate, set guidelines and exact deadlines. The C Styles like to be complimented on their brainpower, so recognize their contributions accordingly.

With the C Styles, be thorough, well prepared, detail-oriented, business-like, and patient.

### At Work Help Them To...

- Share their knowledge and expertise with others
- Stand up for themselves with the people they prefer to avoid
- Shoot for realistic deadlines and parameters
- View people and tasks less seriously and critically
- Balance their lives with both interaction and tasks
- Keep on course with tasks, less checking
- Maintain high expectations for high priority items, not everything

### Sales and Service Strategies...

- Prepare so that you can answer as many of their questions as soon as possible
- Greet them cordially, but proceed quickly to the task; don't start with personal or social talk
- Hone your skills in practicality and logic
- Ask questions that reveal a clear direction and that fit into the overall scheme of things
- Document how and why something applies
- Give them time to think; avoid pushing them into a hasty decision
- Tell them both the pros and cons and the complete story
- Follow through and deliver what you promise

### In Social Settings...

- Use a logical approach
- Listen to their concerns, reasoning, and suggestions
- Respond formally and politely
- Negative discussions are OK, so long as they aren't personally directed
- Privately acknowledge them about their thinking
- Focus on how pleased you are with their procedures
- Solicit their insights and suggestions

## Building and Maintaining Rapport Throughout the Selling Cycle

There are five definable stages to most every buying cycle. Successfully guiding prospects through each phase will lead to positive outcomes for both of you.

**1. Connecting:** Understanding DISC styles will have an impact on the impression you make in the first few minutes of a meeting. In that short, precious time, you make or break the sale. In that time, your prospect sizes you up and determines if you are the type of person he or she would like to do business with.

The purpose of making contact with your prospect is to begin opening up lines of communication. Great listeners make the best salespeople... period. Master the skill of effective listening and every other aspect of your relationships will improve.

**2. Exploring:** The purpose of Exploring is to get an accurate picture of the customer's needs and what it will take to provide an effective solution. To do so, you need to listen to what the customer says as well as know how to ask the right questions to get the information you need.

Asking intelligent questions is a critical sales skill. It does not require asking many questions - just the right ones. Asking questions is similar to painting a picture. You start with a blank canvas and begin to fill in the background and rough in the picture with broad-brush strokes. Then you fill in the details using finer and finer strokes.

**3. Collaborating:** During this phase, you and your prospect collaborate to find a solution that meets the prospect's needs. It is a process of taking your prospect's ideas and combining them with your own ideas to arrive at a solution that makes sense to both of you. The give-and-take exchange can be thought of as an opportunity to "switch heads" with your prospect. Imagine saying this to your customer: "If you and I could switch heads, that is, if you could know what I know about my product and if I could know what you know about your business, we would both know exactly how to give you the best possible solution for your needs."

That's your goal - to come as close as possible to the perfect knowledge that would allow you to develop the ideal solution for your prospect. To achieve that goal, you need to exchange enough information to fully understand your client's business, industry, trends and challenges; and they have to know as much as possible about your products and services and how they can help them. As you propose a solution, relate it to the prospect's needs discovered in the Explore phase and explain how it will work in your prospect's environment.

**4. Confirming:** Gaining commitment flows naturally out of the Exploring and Collaborating stages for the DISC salesperson. If you did a thorough job during the first three stages of selling: Contacting, Exploring and Collaborating, the prospect should close.

The Confirming stage is a critical point in building a customer partnership. DISC salespeople do not use fancy closing techniques. You cannot work through all the stages of the sale and then, at the end, try to use a manipulative closing technique to clinch the deal. It doesn't make sense... and it most certainly doesn't work when you're trying to build long-term customer relationships rather than simply closing one-shot sales.

**5. Assuring:** A great weakness of most salespeople is the way they handle the Assuring phase of the sales process. Most salespeople stop with getting the sales commitment; they disappear from the customer's life, leaving service, installation, training and follow-up to others.

One "old-school" method of selling has an adage that the sale begins when the customer says "no." In direct contrast, the real job of selling starts when the customer says "yes."

Assuring customer satisfaction is a secret ingredient of extraordinary sales success. You will benefit two ways by assuring each customer. First, this assures repeat business. Almost all products have a life cycle and will be replaced or upgraded. Customers have a tendency to return to the salesperson who previously matched them with a product that met their needs and then provided excellent service and follow-up.

Secondly, satisfied customers are excellent sources of referrals. Customers talk. They talk about poor service and they talk about extraordinary service. When they get super service, they refer others to the salesperson who delivered on his or her promises.

Without repeat business and referrals, a salesperson must constantly prospect and cold-call new accounts. That is not the way most salespeople want to spend their lives... and it certainly is not the best way to be successful!

When you start the sales process, you have a chance to begin building a good customer relationship. However, it is only after the sale, when you make sure your customer is satisfied (preferably delighted!), that you really cement the relationship.

## Phase 1: BUILDING RAPPORT DURING INITIAL CONTACT

<p style="text-align: center;"><b><u>Connecting with “D’s”</u></b></p> <ul style="list-style-type: none"> <li>• “D’s” want to know the bottom line.</li> <li>• Just give them enough information to satisfy their need to know about overall performance.</li> <li>• They do not want you to waste their time giving them a bolt-by-bolt description of your product, presenting a long list of testimonials from satisfied clients, or getting too chummy with them – always remember that they are Direct and Guarded.</li> <li>• When you write, call, or meet a “D”, do it in a formal, businesslike manner. Get right to the point. Focus quickly on the task.</li> <li>• Refer to bottom line results, increased efficiency, saved time, return on investment, profits, and so on. In other words, tell him what’s in it for him.</li> <li>• If you plan to sell something or present a proposal to a “D”, take care to be well organized, time-conscious, efficient, and businesslike.</li> <li>• They do not want to make friends with you; they want to get something out of you if they think you have something of value to offer.</li> </ul>	<p style="text-align: center;"><b><u>Connecting with “I’s”</u></b></p> <ul style="list-style-type: none"> <li>• Remember that they are Direct and Open.</li> <li>• When you meet an “I”, shake hands firmly, introduce yourself with confidence, and immediately show personal interest.</li> <li>• Let him set the pace and direction of the conversation.</li> <li>• Be an especially attentive listener with “I’s”.</li> <li>• Give them positive feedback to let them know that you understand and can relate to their visions, ideas and feelings.</li> <li>• Tell humorous or unusual stories about yourself, to win their heart.</li> <li>• Allow them to feel comfortable by listening to their stories, even to the point of talking about topics that may stray from the subject.</li> <li>• Since “I’s” typically enjoy talking about themselves, ask questions about them, but be prepared for lengthy answers. Plan to have as many meetings as necessary to build the relationship and gather information.</li> </ul>
<p style="text-align: center;"><b><u>Connecting with “C’s”</u></b></p> <ul style="list-style-type: none"> <li>• “C’s” don’t care much about social interaction (beyond common courtesy and standard pleasantries), so get to the point.</li> <li>• Avoid making small talk, except to initially establish your credibility.</li> <li>• Speak slowly, calmly and economize on words.</li> <li>• “C’s” are precision-oriented people who want to do their jobs in the best possible manner.</li> <li>• Build your credibility by thinking with your head, not your emotions.</li> <li>• Before meeting, provide them with a brief overview of the agenda and length of meeting, so they know what to expect.</li> <li>• Show them logical proof from reliable sources that accurately document your quality, record of accomplishment, and value.</li> <li>• “C’s” tend to be naturally suspicious of those who talk themselves up.</li> </ul>	<p style="text-align: center;"><b><u>Connecting with “S’s”</u></b></p> <ul style="list-style-type: none"> <li>• “S’s” are Indirect and Open. However, keep the relationship businesslike until they warm up to you.</li> <li>• They are concerned with maintaining stability; they want to know step-by-step procedures that are likely to meet their need for details and logical action plans.</li> <li>• Organize your presentation: list specifics, show sequences, and provide data.</li> <li>• Treat them with honesty, sincerity, and personal attentiveness.</li> <li>• Listen patiently to their stories, ideas and answers.</li> <li>• Express your appreciation for their steadiness, dependability, and cooperativeness.</li> <li>• Present yourself to be non-threatening, pleasant, friendly, but still professional.</li> <li>• Develop trust, credibility, and friendship at a relatively slow, informal pace.</li> <li>• Communicate with them in a consistent manner on a regular basis... especially at the outset.</li> </ul>

## Phase 2: MAINTAINING RAPPORT IN THE EXPLORING STAGE

<p style="text-align: center;"><b><u>Exploring with “D’s”</u></b></p> <ul style="list-style-type: none"> <li>• To head off the “D’s” impatience before it surfaces, keep your conversations interesting by alternately asking questions and offering relevant information.</li> <li>• “D’s” need to view the meeting as purposeful, so they want to understand where your questions are leading.</li> <li>• When asking a “D” question, make them as practical and logical as possible. Aim questions at the heart of the issue and ask them in a straightforward manner.</li> <li>• Only request information that is unavailable elsewhere.</li> <li>• When gathering information, ask questions showing you have done your homework about their desired results and current efforts.</li> <li>• Be sure to make queries that allow him to talk about his business goals.</li> <li>• Gear your exploring toward saving D’s time and energy.</li> </ul>	<p style="text-align: center;"><b><u>Exploring with “I’s”</u></b></p> <ul style="list-style-type: none"> <li>• “I’s” get bored quickly when they’re not talking about themselves.</li> <li>• Strike a balance between listening to their life’s stories and gathering the information you need to be an effective sales consultant.</li> <li>• When asking business questions, keep them brief. If you can, work these exploratory questions in with social questions.</li> <li>• The better your relationship with an “I” is, the more willing he’ll be to cooperate and talk about the task at hand.</li> <li>• “I’s” can be so open they may tell you their fondest hopes and aspirations. If you can demonstrate how your product or service can get them closer to their dreams, they may become so excited about your product—and you—that they’re likely to sell you and your products and services to everyone else in their organization.</li> </ul>
<p style="text-align: center;"><b><u>Exploring with “C’s”</u></b></p> <ul style="list-style-type: none"> <li>• “C’s” don’t care much about social interaction (beyond common courtesy and standard pleasantries), so get to the point.</li> <li>• “C’s” often like to answer questions that reveal their expertise, so they can be very good interviewees.</li> <li>• As long as you ask logical, fact-oriented, relevant questions, they will enjoy speaking with you.</li> <li>• Phrase your questions to help them give you the right information.</li> <li>• Ask open and closed questions that investigate their knowledge, systems, objectives and objections.</li> <li>• Make your own answers short and crisp.</li> <li>• If you do not know the answer to something, do not fake it. Tell them you’ll get the answer for them by a certain time, and then do it.</li> </ul>	<p style="text-align: center;"><b><u>Exploring with “S’s”</u></b></p> <ul style="list-style-type: none"> <li>• “S’s” can be excellent interviewees, so talk warmly and informally and ask gentle, open questions that draw them out (especially around sensitive areas).</li> <li>• Show tact and sincerity in exploring their needs.</li> <li>• If they do not have a good feeling about your product, company, or even you, they are not likely to take the chance of hurting your feelings by telling you so.</li> <li>• They want to avoid confrontations, even minor ones. So “S’s” may tell you what they think you want to hear, rather than what they really think.</li> <li>• They may not tell you about their dissatisfaction with your competitors. Even though this is exactly what you want to hear, the “S” may be hesitant about saying anything negative about them.</li> <li>• Allow for plenty of time (possibly multiple meetings) for “S’s” to open up to you and reveal their innermost desires and pains.</li> <li>• The more time you spend with an “S” exploring, the higher the odds you’ll be landing them as a customer.</li> </ul>

### Phase 3: MAINTAINING RAPPORT IN THE COLLABORATING STAGE

<p style="text-align: center;"><b><u>Collaborating with “D’s”</u></b></p> <ul style="list-style-type: none"> <li>• Your presentation must be geared toward the “D’s” priorities.</li> <li>• Gear your presentation toward how they can become more successful, save time, generate results, and make life easier and more efficient; you’ll get their attention.</li> <li>• Zero in on the bottom line with quick benefit statements.</li> <li>• They want you to do the analysis and lay it out for them to approve or reject.</li> <li>• “D’s” like rapid, concise analyses of their needs and your solutions.</li> <li>• “D’s” like being in control, so give them choices backed with enough data and analysis to allow them to make an intelligent decision.</li> <li>• Then, be quiet and let them make their decision. If you speak or interrupt while they are buying, you will dramatically decrease the odds of making this sale.</li> </ul>	<p style="text-align: center;"><b><u>Collaborating with “I’s”</u></b></p> <ul style="list-style-type: none"> <li>• Show how your product would increase the “I’s” prestige, image, or recognition.</li> <li>• Talk about the favorable impact or consequences your suggestions will have in making their working relationships more enjoyable.</li> <li>• Give them incentives for completing tasks by stressing how their contribution will benefit others and evoke positive responses from them.</li> <li>• Presentations need impact for people with short attention spans, so involve as many senses as possible.</li> <li>• Show them how your solution will save them effort and make them look good.</li> <li>• Back up your claims with testimonials from well-known people or high-profile corporations.</li> <li>• Name satisfied acquaintances they know and admire.</li> <li>• Sprinkle in “visualizing future ownership” questions, such as: “If you were already running this software, how would you use it?”</li> </ul>
<p style="text-align: center;"><b><u>Collaborating with “C’s”</u></b></p> <ul style="list-style-type: none"> <li>• Emphasize accuracy, value, quality and reliability.</li> <li>• They dislike talk not backed up by evidence.</li> <li>• Describe a process will produce the results they seek.</li> <li>• Elicit specific feedback by asking, “So far, what are your reactions?” or “Do you have any questions that you’d like me to clear up?”</li> <li>• Present your solution that shows them they’ll be correct in making the purchase.</li> <li>• Base your claims on facts, specifications and data that relate specifically to their needs.</li> <li>• “C’s” are cost-conscious; increase their perceived value with facts and ROI data.</li> <li>• “C’s” are the likely to see the drawbacks, so point out the obvious negatives before they do. Let them assess the relative trade-offs when choosing between competing (yet imperfect) products or services.</li> </ul>	<p style="text-align: center;"><b><u>Collaborating with “S’s”</u></b></p> <ul style="list-style-type: none"> <li>• Show how your product or service will stabilize, simplify, or support the “S’s” procedures and relationships.</li> <li>• Clearly define their roles and goals in your suggestions, and include specific expectations of them in your plan.</li> <li>• Present new ideas in a non-threatening way.</li> <li>• Provide them time to adjust to changes in operating procedures and relationships.</li> <li>• When change becomes necessary, tell them why. Explain how long the changes will take and any interim alterations of the current conditions.</li> <li>• Design your message to impart a sense of stability and security.</li> <li>• “S’s” like to be shown the appropriate steps to follow, so share those with them.</li> <li>• Involve them by asking their opinions and encourage them to give you feedback.</li> </ul>

## Phase 4: MAINTAINING RAPPORT IN THE CONFIRMING STAGE

<p style="text-align: center;"><b><u>Confirming with “D’s”</u></b></p> <ul style="list-style-type: none"> <li>• With “D’s”, you come right out and ask if they are interested. A “D” will often tell you “yes” or “no”.</li> <li>• You can easily lose the attention and/or interest of a “D” by presenting your information too slowly or by spending too much time discussing minute details.</li> <li>• When you draw up a commitment letter, don’t spend too much time on points the “D” may not care about.</li> <li>• Present them with options and probable outcomes. “D’s” like to balance quality with cost considerations, so offer options with supporting evidence and leave the final decision to them.</li> <li>• We have found that it is effective to present a “D” with two or three options. Provide a short summation of each option, along with your recommendation of each.</li> <li>• While the “D” is reviewing your proposal, don’t interrupt them. The odds are high that they will find an option that appeals to them and closing the deal themselves.</li> </ul>	<p style="text-align: center;"><b><u>Confirming with “I’s”</u></b></p> <ul style="list-style-type: none"> <li>• Show how your product would increase the “I’s” prestige, image, or recognition.</li> <li>• Be open and ask, “Where do we go from here?” or “What’s our next step?”</li> <li>• If they like something, they buy it on the spot (all other things being equal).</li> <li>• You may have to slow them down because they also tend to overbuy and/or buy before weighing all the ramifications; behaviors that both of you may live to regret.</li> <li>• “I’s” dislike paperwork and details so they are likely to hesitate, and even procrastinate, when it comes to spending the time required on a contract.</li> <li>• Have a written agreement prepared due to their tendency to be unclear about procedures, responsibilities and expectations.</li> <li>• Make sure that you agree on the specifics in writing or, later on, you can almost bet on some degree of misunderstanding and/or disappointment.</li> </ul>
<p style="text-align: center;"><b><u>Confirming with “C’s”</u></b></p> <ul style="list-style-type: none"> <li>• Emphasize accuracy, value, quality and reliability.</li> <li>• Provide logical options with appropriate documentation and time to analyze their options.</li> <li>• They’re uncomfortable with snap decisions and when they say they will think about it, they mean it!</li> <li>• If pressured by people or excessive demands, they may use “I’ll think about it,” as a stalling tactic.</li> <li>• “C’s” are educated, logical, comparative “shoppers.” Know your competition so you can point out your advantages relative to the competition in a factual, professional way. Mention your company’s strengths as you suggest questions they may want to ask your competitors that allows them to do a comparative cost-benefit analysis of the options and solutions.</li> <li>• Be willing to explore the subject of a conditional, “pilot program” as a way of reducing their risk.</li> </ul>	<p style="text-align: center;"><b><u>Confirming with “S’s”</u></b></p> <ul style="list-style-type: none"> <li>• “S’s” are slower, deductive decision makers who listen to the opinions of others and take the time to solicit those opinions before deciding. So, make a specific action plan and provide personal guidance, direction or assurance as required for pursuing the safest, most practical course to follow. Arm them with literature, case studies and any documentation available, because they’ll be “selling” your proposal to others within their organization.</li> <li>• When you do reach agreement, carefully explore any potential areas of misunderstanding or dissatisfaction.</li> <li>• “S’s” like guarantees that new actions will involve a minimum risk, so offer assurances and support.</li> <li>• Try not to rush them, but do provide gentle, helpful nudges to help them decide (when needed).</li> <li>• Involve them by personalizing the plan and showing how it will directly benefit them and others.</li> <li>• When asking for a commitment, guide them toward a choice if they seem indecisive.</li> </ul>

## Phase 5: MAINTAINING RAPPORT IN THE ASSURING STAGE

<p style="text-align: center;"><b><u>Assuring “D’s”</u></b></p> <ul style="list-style-type: none"> <li>• “D’s” usually do not look for personal relationships at work due to their focus on accomplishing tasks.</li> <li>• With “D’s,” do not rely on past sales to ensure future purchases. Follow up to find out if they have any complaints or problems with your product. If they do have complaints, address them immediately.</li> <li>• Impress upon your customer your intent to stand behind your product or service.</li> <li>• Stress that you will follow-up without taking much of their time.</li> <li>• You may also want to offer a money-back guarantee.</li> <li>• Whatever the promise, make sure you deliver everything you offer!</li> </ul>	<p style="text-align: center;"><b><u>Assuring “I’s”</u></b></p> <ul style="list-style-type: none"> <li>• “I’s” frequently buy before they’re sold which may lead to buyers’ remorse.</li> <li>• “I’s” can benefit from ongoing reminders that they have made the right decision.</li> <li>• Reinforce their decision by giving plenty of assistance immediately after the sale.</li> <li>• Be certain they actually use your product or they may get frustrated from incorrect usage and either put it away or return it for a refund.</li> <li>• Since they mingle with so many people, you can even ask “I’s” if they’d be willing to share their glowing testimonials about you and your product with others.</li> <li>• If they are feeling smart for using your product or service, most “I’s” will give you more referrals than the other three styles combined!</li> </ul>
<p style="text-align: center;"><b><u>Assuring “C’s”</u></b></p> <ul style="list-style-type: none"> <li>• Set a specific timetable for when and how you will measure success with the “C”. Continue proving your reliability, quality and value.</li> <li>• Make yourself available for follow-up on customer satisfaction and ask for specific feedback on the product or service performance record.</li> <li>• If you have tips for improved usage or user shortcuts, email them to your “C” customers.</li> <li>• You should also ask for their ideas and opinions for how to improve your products and/or services.</li> <li>• When they offer you their suggestions, get back to them about how your company is incorporating their ideas into upgrades into future upgrades, revisions or new products.</li> </ul>	<p style="text-align: center;"><b><u>Assuring “S’s”</u></b></p> <ul style="list-style-type: none"> <li>• Follow-up consistently with an “S”.</li> <li>• Give them your personal guarantee that you will remain in touch, keep things running smoothly, and be available on an “as needed” basis.</li> <li>• “S’s” like to think they have a special relationship with you; that you are more than just another business acquaintance; they prefer a continuing, predictable relationship.</li> <li>• Give them your cell number, along with an invitation to call you any time with any concern. They will rarely use it, but will feel secure knowing it’s available to them.</li> <li>• They dislike one-time deals, so follow up to maintain your relationship.</li> <li>• Impersonal, computerized follow-up is not very appealing to “S’s”, so continue building your relationship with low-key, personalized attention and assistance.</li> </ul>



Phase	With D's	With I's	With S's	With C's
<b>Connecting</b>	<ul style="list-style-type: none"> <li>• Skip small talk</li> <li>• Lead with the main point</li> <li>• Show up fully prepared</li> </ul>	<ul style="list-style-type: none"> <li>• Allow for time and stories before turning focus to business at hand</li> <li>• Let them set the pace of the conversation</li> </ul>	<ul style="list-style-type: none"> <li>• Stick to business until they warm up to you</li> <li>• Don't rush into agenda first</li> <li>• Take an active interest in them</li> </ul>	<ul style="list-style-type: none"> <li>• Skip small talk</li> <li>• Bring an agenda</li> <li>• Remain cool, calm and professional</li> </ul>
<b>Exploring</b>	<ul style="list-style-type: none"> <li>• Let him/her know where the questions are headed</li> <li>• Only ask for information that's unavailable elsewhere</li> <li>• Answer their questions directly</li> </ul>	<ul style="list-style-type: none"> <li>• Alternate questions between them personally and business</li> <li>• Gently guide them back to the topic</li> <li>• Keep the focus on their vision and goals</li> </ul>	<ul style="list-style-type: none"> <li>• Be sincerely interested in their answers</li> <li>• Never interrupt them</li> <li>• Ask nonthreatening questions to draw them out over time</li> </ul>	<ul style="list-style-type: none"> <li>• Ask questions that reveal their expertise</li> <li>• Keep the questions focused on the topic</li> <li>• Alternate open and closed-ended questions</li> </ul>
<b>Collaborating</b>	<ul style="list-style-type: none"> <li>• Make any presentation brief</li> <li>• Focus on the bottom line and/or time savings</li> <li>• Provide concise analysis of needs along with your professional recommendations</li> </ul>	<ul style="list-style-type: none"> <li>• Involve as many senses as possible</li> <li>• Ask for their ideas often</li> <li>• Sprinkle in testimonials</li> <li>• Provide incentives for making decisions</li> <li>• Show how the solution enhances their image and/or saves them effort</li> </ul>	<ul style="list-style-type: none"> <li>• Show how solution will simplify, add stability or support their goals</li> <li>• Present new ideas in a non-threatening way</li> <li>• Never rush them, but provide gentle, helpful nudges toward a decision</li> </ul>	<ul style="list-style-type: none"> <li>• Emphasize value, accuracy, precision, quality and reliability</li> <li>• Stick to facts and logic; attempt to reduce risks when possible</li> <li>• Never pressure for any decision</li> <li>• Remain cool and emotionally detached</li> </ul>
<b>Confirming</b>	<ul style="list-style-type: none"> <li>• Flat out ask if they are interested</li> <li>• Present two or three options with recommendations and summaries</li> <li>• Be quiet while they review and decide</li> </ul>	<ul style="list-style-type: none"> <li>• Openly ask, "Where do you see us going next?"</li> <li>• Be ready to take their order</li> <li>• Slow them down if they're buying too quickly</li> <li>• Do the paperwork for them</li> </ul>	<ul style="list-style-type: none"> <li>• They are slow decision makers and like to consult opinions of others</li> <li>• Don't press for a decision</li> <li>• Focus on a guarantee if relevant</li> </ul>	<ul style="list-style-type: none"> <li>• Provide logical options with documentation</li> <li>• Give them both time and space to make their decisions</li> <li>• Point out any glaring downside to deal if one exists</li> <li>• Suggest a pilot program or warranty to reduce risk</li> </ul>
<b>Assuring</b>	<ul style="list-style-type: none"> <li>• Follow-up to ensure they're 100% satisfied with solution</li> <li>• Keep the relationship all business</li> <li>• Make certain you deliver on every small promise</li> </ul>	<ul style="list-style-type: none"> <li>• Reinforce their decision by providing ample assistance after the sale</li> <li>• Make sure they don't get frustrated (they don't read instructions)</li> <li>• Help them use the product/service to reduce anxiety</li> </ul>	<ul style="list-style-type: none"> <li>• Provide consistent follow-up along with personal assurances</li> <li>• Give them private phone number to reach you</li> <li>• Remind them that you also desire a long-term business relationship</li> </ul>	<ul style="list-style-type: none"> <li>• Share your process and/or timetable for your follow-up</li> <li>• Double-check their method for measuring satisfaction</li> <li>• Email them ideas and shortcuts</li> <li>• Reinforce value, quality and reliability.</li> </ul>

## TAKING OWNERSHIP OF YOUR DESTINY

Imagine what would have happened if you had successfully applied the principles and practices of *Platinum Rule Selling* ten years ago... or even five years ago? Well, hundreds of thousands of people like you have already used these principles and experienced dramatic increases in sales volumes, more satisfaction in their dealings with customers and co-workers (family and friends, also!), and greater awareness of their own strengths and weaknesses. Many people report that they no longer feel like “just a salesperson”; they feel, behave and are treated like a *trusted advisor*. They have an increased ability to help people find solutions to their problems and are more adept at identifying new opportunities.

For you to also share in the pleasure from experiencing these benefits, we encourage you to get started this very minute. First, think about the goals you want to accomplish in the next year... the next month... the next week... even by the end of today! Develop a plan to meet those goals using **The Platinum Rule – Do Unto Others as They Would Have You Do Unto Them** - and the other principles that make up the **DISC Selling Strategies**.

### Accept the Challenge

This first step requires your *personal commitment* to this challenge and your *belief* in these principles and putting them to work for you. Of course, any skill takes practice, and you cannot realistically expect to put all of them into effect immediately. However, the minute you start to sell people they way *they* want to buy, you'll start to see immediate results.

### Commit to Growth

“Change is inevitable... growth is optional.” We love that saying because it's true. Right now, you have the option to take this moment and make a life-changing decision. You may decide to *keep learning* about yourself, your strengths and weaknesses, how you make decisions, how you come across to other people, etc... You may decide to learn more about DISC styles and apply your new knowledge in other relationships beyond selling - relationships with your co-workers, children, spouse and/or family.

Hopefully, you may decide to use this report as a jumping-off point for a new direction in your career. If that thought excites you, we urge you to learn more about how DISC may be applied in all phases of business: prospecting, networking, marketing, communications, customer service, referral building, client loyalty, hiring, management, leadership, etc... We offer programs, technology, books, CD's, DVD's, self-paced online courses, speeches, and on-site workshops that are all specifically designed to help you apply this amazing concept in key facets of your business and your life.

**Here's wishing you continued success!**

## Additional DISC Resources

**A variety of great resources to deepen your DISC knowledge, such as a PDF workbook, PDF eBook, MP3 audio, DISC Virtual Training, etc.**

**We have one great offer **FOR ONLY \$0.99**  
(at over a 90% discount) – a fantastic value!**

**Take a look at <http://www.AssessmentDownloads.com/offer>**

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