DISCflex™

Sales

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INDABA

Introduction

What is a DISC Assessment?

DISCflex™ assessments are used to evaluate your overall behavioral tendencies. By completing a DISCflex™ Assessment you reveal the elevations of four DISCflex™ Factors - Dominance, Influence, Steadiness, and Compliance, on a scale from 0-100. Based on those DISC Factor scores, we came up with DISC Patterns to quickly identify which factor(s) you display most often. Please note: there are no right or wrong answers and there is no perfect score or pattern!

Let's quickly define what DISC stands for before we delve into the details.

Dominance is your need for **control** and your source of **ambition**.
Whenever you are feeling self-motivated, you are using your 'D' factor.

Influence is your need for **communication** and your source of **persuasion**.
Whenever you are feeling talkative, you are using your 'I' factor.

Steadiness is your need for **planning** and your source of **thoughtfulness**.
When you go out of your way to help someone, you are using your 'S' factor.

Compliance is your need for **structure** and your source of **organization**.
When you become extremely focused on completing your tasks, you are using your 'C' factor.

Goals

This report will assist you in uncovering your strengths and will provide ways to mitigate your weaknesses. The report will provide valuable Coaching Advice on how best to "become a chameleon on a rainbow," being able to adapt to any professional situation. The goal is to provide you with a complete guide to understanding your behavior. The DISC eLearning was designed to help you practically apply what you have learned. It is a good idea, therefore, after you become more knowledgeable by going through the course materials, that you should retake the assessment.

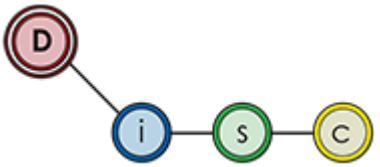
Flexing Your Behavior

Once you have read your report and become familiar with your behavior style and how it can affect the people around you, the next step is to start flexing. Flexing refers to internally monitoring your behavior and choosing how you interact or react to situations. For example, an extrovert may need to "dial down" their Influence factor and talkative impulses during a meeting to make sure the team stays focused on the task at hand. While an introvert may need to "dial up" their Influence factor during a meeting to make certain that their views and opinions are heard and taken into account. Flexing refers to the conscious adjustment in behavior, whereas the term *morphing* refers to the change in your natural behaviors over time due to flexing.

Disclaimer: The intent of this report is that it is not to be used for hiring decisions, nor is it appropriate for decisions regarding promotions or any other performance-based inquiries. This report can be used for professional development recommendations in tandem with our patent-pending eLearning, coaching and training solutions, as well as for Blended Learning.

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Summary & Scores

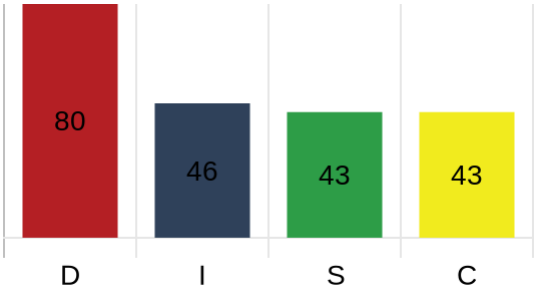


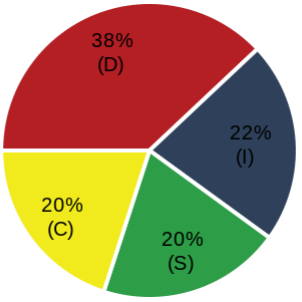
My DISCflex™ Pattern

You have an elevated Dominance pattern. You are strong-willed, self-motivated, and determined by your actions. You like to be in a leadership role and will typically take charge and make decisions very quickly.

What does that mean?

You love to be constantly challenged and rely on your decision making to solve problems. You are able to initiate action and lead others by taking charge. Routines bore you and you strive to accomplish your own vision. You can challenge others thoughts or ideas and are not afraid to argue your point of view.





Compare your behaviors

Looking at the big picture, you are able to see your behavioral style is governed most by your Dominance Factor. The Pie Chart shows how each of the 4 factors make up your total behavior profile. The bigger the Pie Piece, the higher the likelihood you will display this factor's tendencies as one of your "go to behaviors". When you flex, you expand or compress a section of your Pie Chart. Logically, this will force compression or expansion of the other Pie Sections. The goal is to flex with intent based on the situation you are facing. This gives you a visual representation of how much effort it will take to expand ("Dial Up") or compress ("Dial Down") your behaviors.

Strengths
Determined
Self-governing
Straightforward
Pioneering

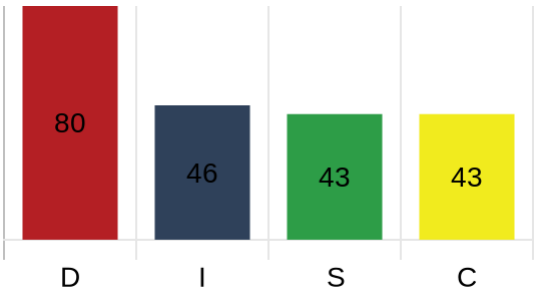
Potential Challenges
Focus
Giving up control
Prioritization
Deciding too quickly

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Motivators & Stressors

Motivators

Ready to get motivated? We've highlighted some key things that get your blood pumping. You will find that some of these motivators happen on an unconscious level. Use these to explore other motivators you have within yourself and that guide you to certain decisions and actions.





- Results
- Challenges
- Being the leader
- Making decisions
- Being able to work at a quick pace
- Multi-tasking

Stressors

When you get angry or frustrated, it's due to one of your stressors. This list provides some of the deeper stress factors that happen in your brain and causes you to act in a negative manner. When you let your stressors get to you, always know that you are at risk of causing conflict within yourself and your relationships with others. Understanding your stressors can help you prevent this.



- Rules
- Details
- Not being in control
- Relying on others
- Roadblocks
- Maintaining Organization

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Sub-factors Overview

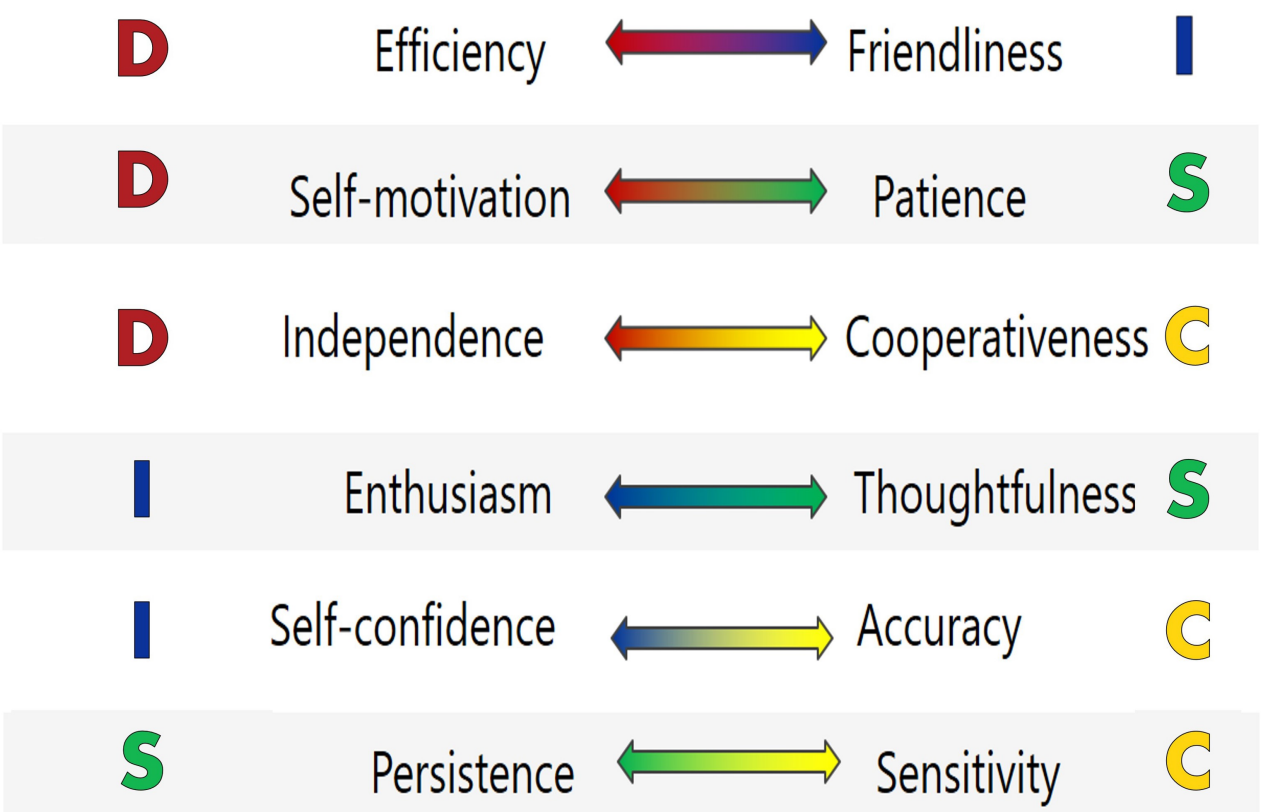
Introduction to Sub-factors

DISCflex Sub-factors™ describe the relationship between two DISC Factors. Simply put, a Sub-Factor is your natural tendency to use one DISC Factor over another. There are 12 Sub-Factors on 6 different specturms (see below). Each Sub-Factor Spectrum is made up of two strengths, one for each DISC Factor being measured. The larger the gap between your scores for the two Factors, the harder it might be for you to flex from your Driving (natural) Factor to your Opposing Factor.

Flexing your behavior to focus more on one side of the Spectrum may require you to consciously focus less on the other side. For instance, to become more *efficient*, you may have to focus on giving up some *friendliness*, and vice-versa. Your focus can (and should) change situationally, whether intentionally or unintentionally. The goal is to be aware of your natural tendencies and be able to intentionally adjust your behavior to whichever Factor would provide a more beneficial outcome.

Before looking at your results on the following pages, take a look at the 6 spectrums and figure out which end of each spectrum you lean towards most often. Circle the 3 skills that are easiest for you, and put a star next to the 3 skills you need to work on most. If you feel you can use both skills interchangeably, put a circle in the middle of the spectrum. Then see how your results compare to your assessment results on the following pages.

The 6 Sub-Factor Spectrums



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First Sub-factor

Driving Sub-factor

Self-motivation



With your Dominance factor greater than your Steadiness factor, this gives you the Sub-factor Self-motivation. You always like to be on the move and think of ways to get things done. By creating new plans and ideas, you do not need other people to tell you what to do because you are the one that looks to take action.

- Active
- Energetic
- Forceful
- Creative
- Full of life
- Lively

Opposing Sub-factor

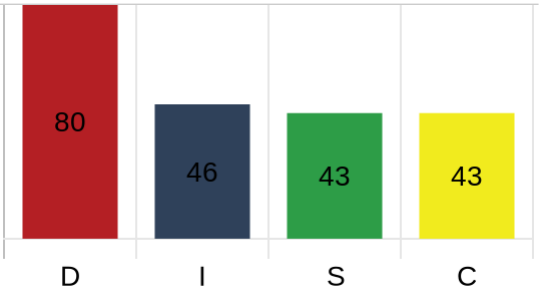
Patience



Patience is the opposing sub-factor to Self-Motivation. Sometimes it is a good idea to step back, assess the situation, and gather feedback from others before moving forward. Be sure to "Dial-Up" your S Factor in order to listen and think objectively before taking action.

- Anticipate when you might become impatient. Visualize yourself as a patient person.
- Calm down and rationalize the situation, look at the big picture.
- Empathize with people around you.
- Prepare a plan for when patience is needed.
- Remember that good things take time to happen.
- Find your patience patterns and recognize your triggers.

Your Scores



Take another look at your scores. The greater the gap between two factors, the harder it will be for you to flex from your Driving Sub-factor to your Opposing Sub-factor. The more you practice dialing up your opposing factor the easier it will become to situationally flex. The goal is to utilize the appropriate behavior depending on any given situation.

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Second Sub-factor

Driving Sub-factor

Independence



With your Dominance factor greater than your Compliance factor, this gives you the Sub-factor Independence. You take pride in being able to accomplish things on your own. You act as a visionary by being able to create your own rules and ways of doing things.

- Self-determined
- Objective
- Free
- On your own
- Private
- Self-reliant

Opposing Sub-factor

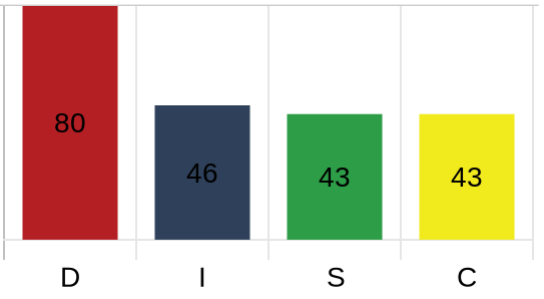
Cooperativeness



Cooperativeness is the opposing sub-factor to Independence. Working independently is good, but be sure that you are keeping the big picture goals of your team or organization in mind. "Dial-Up" your C Factor to ensure you are cooperating within established standards and with the appropriate parties.

- Be positive about what you can achieve with other people.
- Be enthusiastic about working together.
- Make sure everybody understands why you're cooperating.
- Set ego aside and focus on team goals.
- Open the lines of communication and have mutual respect.
- Be accepting of others and changes that happen. Build trust by being open.

Your Scores



Take another look at your scores. The greater the gap between two factors, the harder it will be for you to flex from your Driving Sub-factor to your Opposing Sub-factor. The more you practice dialing up your opposing factor the easier it will become to situationally flex. The goal is to utilize the appropriate behavior depending on any given situation.

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Third Sub-factor

Driving Sub-factor

Efficiency



With your Dominance factor greater than your Influence, this gives you the Sub-factor Efficiency. You are driven to accomplish your task the most effective way possible. You are able to focus on the project at hand and will not be distracted by personal aspects of a situation.

- Productivity
- Performance
- Effective
- Know-how
- Organized
- Competency

Opposing Sub-factor

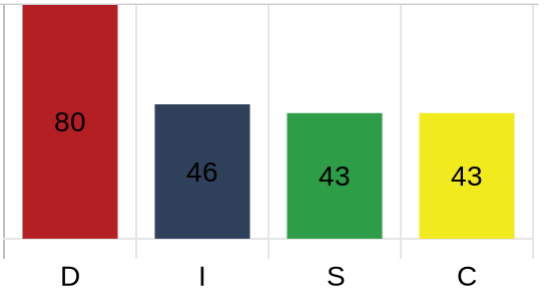
Friendliness



Friendliness is the opposing sub-factor to Efficiency. You may need to focus on building better relationships. When you are stressed and in "work mode" don't forget to be polite to those around you. "Dial-Up" your I Factor to the proper level of friendliness that the situation calls for.

- Engage in conversation and listen more than you talk.
- Be positive when you talk to people.
- Invite people to spend time with you.
- Remember the Golden Rule.
- Practice humility.
- Be genuinely interested in learning from and about other people.

Your Scores



Take another look at your scores. The greater the gap between two factors, the harder it will be for you to flex from your Driving Sub-factor to your Opposing Sub-factor. The more you practice dialing up your opposing factor the easier it will become to situationally flex. The goal is to utilize the appropriate behavior depending on any given situation.

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Third Party Introduction

Why is 3rd-Party Feedback Important?

3rd-Party Feedback is an important tool that helps you better understand your relationship with others. Seeing how other people view your behavior can help you identify "Blind-Spots" in your behavior. Your self-perception can be skewed to reflect how you *would like to believe* you act, but gathering feedback from others can confirm or contradict your self-perception. Using this infomation, you can take a step back and try to understand *why* others might see your beahviors the way they do.

How does 3rd-Party Feedback work?

Your 3rd-Party Assessors are asked to take a 22 Question Assessment about your behavior. The information on the following 3rd-Party Pages is based on the feedback provided by your assessors. If only one person completed the assessment (within each group) you will see only one person's opinion, but if two or more people have taken the 3rd-Party Assessment you will see the aggregate of their responses. The 3rd-Party Results paint a picture of how people percieve you that will get clearer with more people's feedback.

How do I invite more 3rd-Party Assessors?

You can invite additional 3rd-Party Assessors anytime by logging into your User Account and clicking the **"Invite 3rd-Party Guests"** button. Download your report again to get the latest 3rd-Party Results.

Why are there 3 different groups?

We break the feedback into 3 different groups to see how you behave in different environments. For example, some people behave very differently at work than they do at home, and that's okay. The important thing is to use this feedback to "look in the mirror" and see if other people perceive you the way you want to be perceived, and taking steps to adjust your behavior when there are discrepencies.

You will have the option to mark each assessor as a Co-worker, Family, or Friend. Be sure to classify your 3rd-Party Assessor into the correct group to get the most accurate information in your report. If a person fits into more than one group, simply select the best fit for the individual and their results will populate into that group's results.

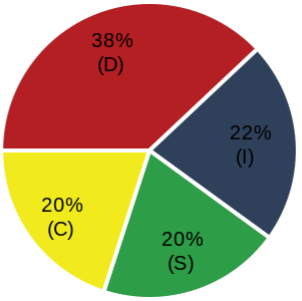
Do the 3rd-Party Assessments affect my whole DISCflex Report?

No. The feedback we gather from 3rd-Party Assessors will only affect the 3rd-Party Pages of this report. The rest of this report is based soley from your self assessment results.

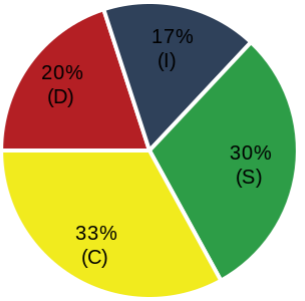
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Third Party Overview

How You See Yourself

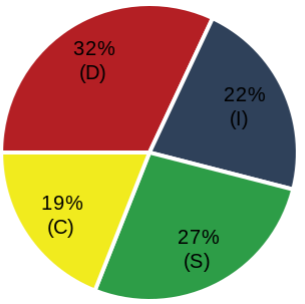


How Co-workers See You



How Family Sees You

How Friends See You

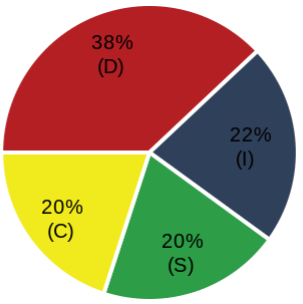


DISC Factor	Self-Perception	3rd-Party Perception		Variances
Dominance	80	Co-workers	48	-32
		Family	0	0
		Friends	76	-4
Influence	46	Co-workers	40	-6
		Family	0	0
		Friends	52	6
Steadiness	43	Co-workers	72	29
		Family	0	0
		Friends	64	21
Compliance	43	Co-workers	78	35
		Family	0	0
		Friends	48	5

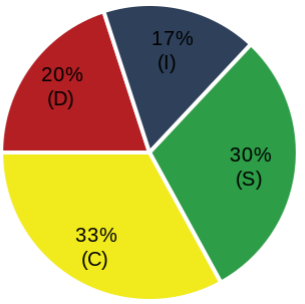
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3rd-Party Details - Co-workers

How You See Yourself



How Co-workers See You



DISC Factor	Self-Perception	Co-workers Perception	Variances
Dominance	80	48	-32
Influence	46	40	-6
Steadiness	43	72	29
Compliance	43	78	35

How Co-workers May Describe You

Your co-workers have indicated that your behavioral style shows elevated Steadiness and Compliance patterns. You are thoughtful, accurate, and patient in your actions. People regard you as logical and trustworthy. On a team, you are viewed as steady, reliable, and the 'go to person' for figuring out how to maneuver within the system.

How Co-workers might describe your Strengths and Challenges…

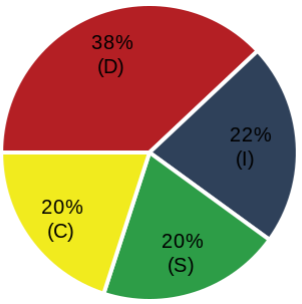
Strengths	Potential Challenges
Easy Going	Overanalyze information
Good Listener	Socializing with new people
Considerate	Sharing opinions
Hyper-Organized	Decision making

It is important to note that your 3rd Party Assessors did not select any of these specific adjectives during the assessment process, so take this feedback 'with a grain of salt'.

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3rd-Party Details - Family

How You See Yourself



How Family See You

DISC Factor	Self-Perception	Family Perception	Variances
Dominance	80	0	0
Influence	46	0	0
Steadiness	43	0	0
Compliance	43	0	0

How Family May Describe You

How Family might describe your Strengths and Challenges…

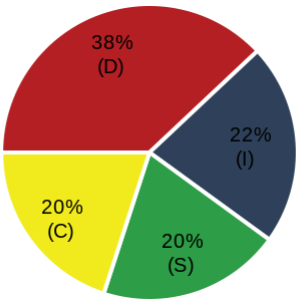
Strengths	Potential Challenges

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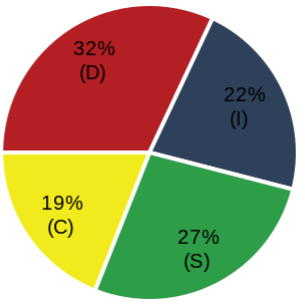
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3rd-Party Details - Friends

How You See Yourself



How Friends See You



DISC Factor	Self-Perception	Friends Perception	Variances
Dominance	80	76	-4
Influence	46	52	6
Steadiness	43	64	21
Compliance	43	48	5

How Friends May Describe You

Your friends have indicated that you have an elevated Dominance pattern. You are strong willed, self-motivated, and determined in your actions. You like to be in a leadership role and will typically take charge and make decisions very quickly.

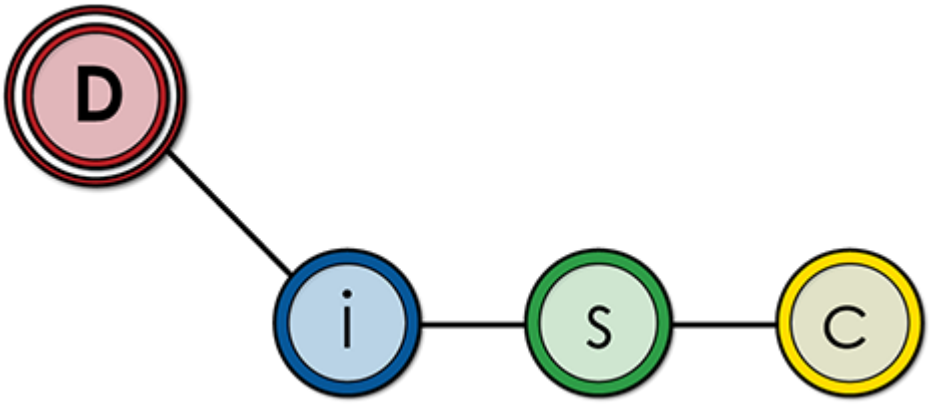
How Friends might describe your Strengths and Challenges…

Strengths	Potential Challenges
Determined	Focus
Sociable	Giving up control
Considerate	Prioritization
Creative	Deciding too quickly

It is important to note that your 3rd Party Assessors did not select any of these specific adjectives during the assessment process, so take this feedback 'with a grain of salt'.

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General Behavioral Tendencies



Elevated Dominance Patterns like yours are driven to achieve, love getting results, and are determined to find success.

The rest of this report will walk you through your behavioral tendencies, Susan. Bear in mind that we have provided highly customized insight on each of your DISCflex™ factors and their unique elevations. In order to make the best use of the information in this report, we suggest that you make notes and write down a few action steps and specific suggestions for each category. For each of the DISCflex™ factors to make sense in your report, we first have to set some context. Each factor has its pros and cons, and will result in distinct behavioral characteristics.

There is no perfect or ideal DISCflex™ Sales profile. Job profiling for anyone in business development or sales by using DISC Factor analysis just is not fair. The reality is that there are successful salespeople with any number of DISC Factors elevation combinations. That said, each factor will result in distinct behavioral characteristics - good and not so good for sales and marketing efforts. As we go through your report, we will discuss your strengths and weaknesses in the context of business development and lead generation. We think it is important to provide caution and tips for your benefit. **After we discuss your General Behavioral Tendencies, the report will walk you through each of the following sections:**

- **Initial Interview**
- **Research & Discovery**
- **Mental Preparation**
- **Building Trust & Rapport**
- **Gathering Data**
- **Presentation Skills**
- **Decision Making**
- **Closing the Sale**
- **Relationship Building**
- **Motivators & Inspirational Forces**
- **Primary Motivational Elements**
- **Sales Improvement Action Plan**
- **Self-Improvement Action Plan**

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Let's start by understanding each of your four DISC factors.

Your Dominance Factor

Now that you are ready, let's first discuss your Dominance Factor. The Dominance Factor measures a person's need to be direct or to be directive. It is highly focused on outcomes and getting results. Since your 'D' is highly elevated, you have the drive and results orientation that is required in a top salesperson without having to dial it up at all. In fact, at some points in the Sales Process we will caution you to dial your Dominance down! You are certainly competitive by nature and this trait should serve you well in your professional business development endeavors.

There is a caveat to this though: Remember to utilize your influencing abilities at the level required to maintain trust and rapport. You should be aware (at all times!) of your level of Dominance during each stage of the Sales Process. If you fail to monitor and adjust this important factor, you will be less effective in achieving those all important **Move Ahead Goals**.

Your Influence Factor

The Influence Factor is centered around your ability to influence others, such as being persuasive enough to change somebody's mind, convince them into helping your team, or prevailing upon them to take on your product or service for the first time. Inducing or influencing others to do something they might not otherwise be inclined to do is the mark of an elevated Influence Factor individual. It’s all about communication, interactions, and persuasion. It might also be giving people praise or reinforcing what they are doing. Inducement can be providing an incentive or being encouraging.Susan, since your Influence Factor is in the medium range - below the midpoint, it means that you are not comfortable being (nor do you have any desire to become!) a social butterfly. Individuals with this level of Influence Factor typically prefer to cultivate a small, albeit select group of friends that they trust and admire. The same is true when building a customer base. You get to know your clients at a deep level and cherish your relationship with them.

Warning: Be careful that you don't lock in with one person in case they leave and you lose business. Make sure to develop relationships with multiple people in each business you work with to cement your position with your clients.

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Your Steadiness Factor

Susan, let's move on to your Steadiness (S) Factor which is in the medium-low range. After the initial shock of any change you can easily adapt. You are rarely locked into position and flexibility is an instinctive component of your psyche. Where others might falter when faced with uncertainty, you are able to process and balance various paths of action.

Warning: Be careful that you are not tempted to move along too quickly. Just bumping up your Steadiness behaviors slightly, taking a moment longer in thinking through strategic moves during the Sales Process might make the difference in elevating your closing ratio to a level that will breeze past your competitors. Stepping back, honing this skill and focusing on Steadiness traits, will most certainly bring about an increase in your sales numbers.

In DISC terms, Steadiness measures steadfastness, thoughtfulness, consistency, commitment, and the pace at which an individual typically likes to operate. Originally, in his research, Dr. Marston described the 'S' Factor of submission as a willingness to follow others. It was meant to be a good thing! However, this word's meaning in our culture has changed significantly. Submission is not viewed favorably, but in order to be successful in the sales arena you have to know how (and when) to submit to the will of the customer and their needs.

Your lower elevation of Steadiness Factor reflects a tendency to stand up to and defend your position – the opposite of submission. It's a sign of stubbornness, too. Hard as it is to swallow, if you really think about it, I'll bet you are naturally tenacious - and stubborn!

To fully understand this, think of the 'carrot and stick' metaphor. Submission/steadiness is the carrot and Compliance is the stick. Today the focal points of the Steadiness Factor are thoughtfulness and planning, strategic mindset and the pace at which you like to operate, as well as your tendency to be loyal. Marston pointed out that affection and respect were 'S' type behaviors. You might have to work on these by dialing up your 'S'. Another point to consider is that highly elevated Steadiness is not always a good thing. You don't easily submit to the will of a group or to peer pressure. With your lower level of S you are most likely more self and your team focused. So in this regard it might frustrate those with higher elevations of Influence Factor. Be careful of this or you might alienate them! They will struggle to understand your lower 'S' and may misconstrue it as 'not caring enough'.

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Your Compliance Factor

Finally, let's discuss your Compliance Factor. Compliance (C) measures a person's need for structure. This factor has dominion over things like policies, procedures, rules, laws, detail orientation, and to a large extent measures the preferences in these areas: degree of agreeableness or argumentativeness, level of natural obedience to cultural norms, conformity to established standards, and observance of protocol. All of these come into play in the Sales Process.

Susan, your Compliance Factor is mid-range-to-lower than half of the population. To that end, you have no problem handling a sales environment where things are fluid and ever-changing. In fact, you often like things to change to keep life interesting! This is particularly true when those changes help your clients see that your products and services are up-to-date, state-of-the-art, and cutting edge. If you look at why you chose to sell the services and products you do, one of the reasons might be based on adaption to the market and customer demands. You love the new, the exciting, the ever-improving. These type of products and services are best suited to your natural inclinations.

Now that you have a good understanding of the four DISC factors, let's dive into some of your sales tendencies.

Your Steadiness score suggests that you will tend to want to spend less time thinking and strategizing than doing.

While action is critical during the Sales Cycle, the best sales professionals spend a lot of time thinking through every aspect of putting the deal together before they launch into action.

The most successful business development personnel take plenty of time to sort through how best to spend their time, make contact with prospects, and follow up with potential clients. Finally, they do a lot of thinking about how to close the deal. They think through contingency plans and potential objections.

Revenue Maker: If you spend just a little bit more time doing this, and combining the talents you already possess in striving towards action and results, I will guarantee that you will reap significant results.

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Your Compliance level suggests that you often agree that changes are vital and necessary. You believe that one of the main reasons your clients do business with you is because of your flexibility. While this might be true, it can cause problems for your organization and your co-workers. For every exception you grant, the man-hours expended must be considered. So, next time you think about making a concession, first consider if the client's request has merit. **Every situation is different and often people with a lower Compliance Factor first leap to the "Of course!" before thinking about whether this may be a situation where an exception should indeed be granted.**

Sales Coaching Advice: Your goal should be to make sure your customer understands and agrees with your rationale. Appearing flexible and considerate is still critical. More important is your ability to chat about the rules and policies in a way that clients will understand and trust you. Be prepared to talk through the pros and cons and the costs before committing one way or another.

Take advantage of exclusive markets.

Because your Influence Factor is in the medium range, when in a selling environment, it might be best to build your reputation up and 'sell' your expertise or promote your products or services in an exclusive or niche-based market. In this way you can build your sales pitch to inspire confidence in your customers and easily counter objections during the sales cycle.

If you are pitching in a mass market, you are definitely going to have to learn to dial-up your 'D' if you don't naturally have this already. However, because your Influence Factor is lower, you will handle rejection much better than someone with a higher Influence Factor. This could be just the plus you require if you have to call on a lot of people to make your sales quota.

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You have a high energy level and use this to consistently go the extra mile in everything you undertake.

The good news about your high Dominance Factor is that you will tend to be self-motivated and also driven to achieve great results for clients, too. If you can successfully demonstrate this attitude and attribute, the vast majority of prospective clients will find it exceptionally appealing

Susan, you love it when you can tell clients that you have been able to grant them a special exception.

You revel in the moments when you have successfully pled their case and were successful through your efforts or influence.

Beware: The more you do this for clients, the more they will come to expect you to grant exceptions. One day, when you are unable to deliver, they will be disappointed with your unwelcome news. This will definitely do some damage to your relationship. Therefore, raising the bar too high in this 'granting exceptions' area without monitoring expectations could indeed come back to bite you. This is probably where the expression, "No good deed goes unpunished" comes from!

Sometimes you'll have to make a choice about which behaviors you will let control your actions.

Understand that not choosing creates stress. Note: The higher your elevation scores in any given factor, the more difficult it will be to let go of its associated behaviors. Your medium Influence Factor might get overpowered by one of the other factors. Monitor how much control you give them -- especially when you think that another factor's behaviors would work better for the situation. An added complexity, the closer in score two factors are, the more stressed you will be in deciding which one to allow to take over. The only way out is to actually make a decision! Be particularly careful not to allow yourself to stay in limbo for too long in front of clients either. Uncertainty about which characteristics and behaviors to use makes you look unsure of yourself. If clients pick up on this, it destroys credibility. No one wants to give business to a person who does not appear confident.

Beware: Never make the mistake of jumping between factors too quickly. To illustrate this, think about a similar elevation in 'I' and 'D' type behaviors. If you jump between the two the client might wonder which you are - friendly or driving. Such client thoughts are the breeding ground of uncertainty and distrust - leading to no decisions and no sales!

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General Behavioral Tendencies

As mentioned, the level of Dominance that naturally occurs in your behavior is higher than the majority.

To most clients, if you channel it properly, this will be perceived as a 'take charge' characteristic. You probably notice that people often follow your lead, take advice from you, and generally perceive you as a go-getter during the Sales Process.

Beware: If you let this strong trait dominate a sales meeting unchecked, it might be particularly off-putting to others who either have a naturally high Dominance Factor or those who have dialed-up their 'D' to match your own. Going head-to-head with another high 'D' may do damage in any relationship. Even worse, people who dislike high Dominance-type behaviors might find your behavior too pushy, too controlling, or too quick moving. The key is to monitor the level of Dominance appropriately and simultaneously do a check and balance with the levels of rapport. Whenever it starts to feel like a heated debate, you are heading down the wrong path.

Because your Steadiness Factor is in the lower middle range, you are able to operate in a fast-paced, uncertain selling environment.

You won't always prefer a systematic process for each stage of the Sales Process. This is important if you want to excel as a business development or sales person. Consistency is important at each stage of the Sales Process. Clients expect nothing less. Honing an impression of dependability in referral gathering, analysis, data gathering and in closing will make you much more effective. Ultimately, the more methodical and consistent you become in your delivery, selling style, and appearance, the more clients will respond to you because they see and hear what they expect. You have trained them, through consistency.

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Initial Interview



The ideal is to have your IS Factors in play, dial down your D (because you might appear pushy and might not be in a ‘listening mode’) and C (because you have to appear to be flexible). Influence is your skill at winning people over and being friendly. Steadiness is your ability to convey loyalty and thoughtfulness.

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The goal for the initial interview phase of the Sales Process is to gain credibility with your client.

This is where your relationship begins and where you set the tone. You must move the prospect toward a decision whereby they open the window to possibly do business with you and your firm. How you engage your DISCflex™ Factors and behavioral tendencies will determine the success of the Initial Interview.**Influencing skills are especially important during your first interactions with prospective clients.** Let's discuss your Influence Factor first and those preferences that come into play during the Initial Interview.

Everyone wants to make a good impression on prospective clients. That's a given! Because your natural Influence factor is below the midpoint, it would be wise to concentrate on building your flexibility in this area. In the Initial Interview, your Influence Factor is critical. If you make the effort to study and become skilled at persuasion tactics, communication skills, and other influencing methodologies, you can make sure that you will be able to increase your effectiveness when you need to demonstrate Influence Factor behaviors.

For example, learning precisely how to make an excellent impression is important. There are image, vocal, and overall perception points that can set you far above your competition. By grooming yourself in these competencies you can become masterful and highly persuasive during the Initial Interview. Plus, by learning rapport building tactics, you can make sure that you always put your best foot forward when first interacting with would-be buyers.

Warning: If you don't build these important skills, potential buyers will pick up that you are uncomfortable. You're simply not as skilled in this arena as they expect you to be. It might not be anything they can pinpoint.{me_I_low}**Influencing skills are especially important during your first interactions with prospective clients.** Let's discuss your Influence Factor first and those preferences that come into play during the Initial Interview.

Quite a few people in your life may view you as being very level-headed and on the whole, unemotional. This is because your naturally low Influence Factor does not carry much weight in your behavior. In the Initial Interview your Influence Factor is critical. This could play out in how you go about creating a first impression, doing a presentation, or closing. Remember, your natural preference is that emotions do not carry much weight with you when you are trying to make a sale.

Warning: At certain points in the selling process you have to make sure that you understand that people will naturally expect you to dial up your Influence Factor behaviors. When people imagine what a salesperson acts like during a first appointment, they anticipate the person would want to make a great first impression and try to put the prospective customer at ease. Customers assume that there will be small talk before launching into business. They anticipate a friendly conversation to warn things up. In this way, people break the ice and build a high degree of commonality. This forms the basis of their relationship. **Customers might find that your lower Influence Factor behaviors are subconsciously unsettling; especially if your customer's natural Influence Factor is much higher.**

Sales Coaching Advice: This is definitely something you should be on the lookout for - especially during the initial meeting. On the plus side, if you are dealing with someone who is like yourself, your unemotional, get-straight-down-to-business focus makes you seem like a breath of fresh air! The other person might think: "Finally, someone who understands the value of my precious time!" In rare instances such as these, you may indeed come across as highly professional and direct instead of the highly undesirable 'detached' or even worse 'disinterested'.

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If the client has a question or wants to venture off the beaten path for a moment, you can easily follow, before leading them back.

This is a useful trait in the fact that it helps so you rarely get caught off guard.

Sales Coaching Advice: When you need to use Steadiness type behavior in the Initial Interview, this requires that you have a high level of thoughtfulness, planning, calmness, and preparation. For example, if the client does go off on a tangent, by employing thoughtfulness in advance - by pre-thinking the client's solutions and having them to discuss - you can cut down the time it might take to deviate. If you successfully employ Steadiness behaviors, the result will be that you start to create a deep, long-term bond with your client.

With your medium level Compliance score, you are the type of person who doesn't do well with pre-planned scripts or canned presentations.

Beware: To build trust and credibility in the Initial Interview stage of the Sales Process, you need to incorporate process, agendas, and structure for the interview to progress smoothly. In order to work with your style, put together something that provides a game plan or road map. This will help keep you on track so that you remember to deliver all of the elements ensuring that you conduct a successful Initial Interview.

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People with a medium-to-lower elevation in their Influence Factor typically don't possess that raw inborn talent in interacting with others that extroverts seem to have.

Because of this, clients may think that you aren't as outgoing as they imagined a salesperson to be.

Sales Coaching Advice: Try to be as relaxed and open as possible. Learning techniques to dial up your degree of Influence Factor is fairly easy. If you practice, you can quickly incorporate them into your Initial Interview repertoire. This will ensure that you are highly effective at influencing prospective customers right from the get-go to trust not only your product and services, but you as well. With your logical mind, you might overlook the importance of your Influence Factor thinking that clients will gravitate to you for other reasons than a bubbly personality but be careful to never discount how vital this component is. In the Initial Interview this skill is critical!

Many of your clients will expect you to have (as a salesperson) an outgoing and inviting personality. If you can't naturally demonstrate this, they will think that something is not quite 'right'. This is called cognitive dissonance. **NOTE:** It plays a vital role in the Sales Process.

When cognitive dissonance occurs in the Sales Process, the client has three choices:

1. Fight the feeling
2. Flee form the situation causing the feeling
3. Reconcile and overcome the feeling

In your case, this feeling will most assuredly have to be overcome. The number one reason to select a vendor is because the person they are dealing with is likable. Therefore, make it easy for your client to reconcile their cognitive dissonance (i.e. about your lower degree of Influence Factor) and feel good about doing business with you.

We cannot stress this enough: Please learn the tips and tactic in dialing-up your Influence Factor to an appropriate level so that the phantom of cognitive dissonance does not curtail your best chance to make a great first impression in the Initial Interview stage of the Sales Process.

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Initial Interview

Susan, your Compliance Factor behaviors will determine whether or not you ultimately will be disciplined, methodical, and systematic in your approach to successfully landing Initial Interviews (new client fact-finding meetings) with prospective customers.

Many salespeople do not like tracking mechanisms. However, from our research, the best-in-class salespeople understand precisely how important compliance is in tracking the activity on the front end of the business development process. It is the leading indicator of sales success.

Think about how important tracking sales revenue and new contracts/sales is to you. You probably think about these numbers a lot. However, these types of numbers are lagging or trailing indicators of your business development cycle. They track sales success (after the fact); and by design are irrelevant in determining how successful you will be in the future. Everyone knows that “past performance is not a guarantee of future success". So, why don’t most salespeople like tracking the front end of the funnel? Is it because they think it’s a waste of time? Do they believe their time could be better spent actually contacting clients? Of course they do! Actually, it’s really a behavioral preference.

Your Compliance Factor determines how you feel about policies, procedures, and – you guessed it – tracking! The lower your Compliance Factor, the more you will rail against tracking the front end of the funnel. Remember, Susan, your elevation is - it is in the medium-to-low quartile which means this is something you really have to concentrate on. Often, dynamic salespeople with lower Compliance Factor scores typically ‘sell’ themselves that they are doing more (and more effectively) than they are in reality. It’s the nature of a salesperson. It stands to reason if they are good at convincing other people to believe them, why wouldn’t that same skill-set work on their self-talk? In this case, it does, to their detriment!

Another thing, sales people hate to be proven ‘wrong’. So, putting their actual numbers of front-end activity “in their face” and shining a laser beam on the weak areas, doesn’t make them happy! So, salespeople avoid it, rail against it, call it ‘micro-managing’, and anything else they think will resonate to get their managers off their back on tracking that front-end. Does this sound like something you’ve ever done? My guess is YES!

Now that you know what you do, what specifically might the consequences of this behavior be on your goals and on reaching (or not) your full sales potential? What about the consequences to the manager who fails to insist upon getting that tracking information from you? First of all, it isn’t fair to you if they let you off the hook. Think about it. You already know the consequences, and you know you aren’t good at self-accountability, so your manager would be remiss in not holding you to at least a minimum standard for tracking your front-end activity with a 'Project 100' and an 'Indaba 57' (or something similar), right? As a logical person, you probably agree.

Sales Coaching Advice: Dial-up your Compliance Factor and just deal with it. Chances are that you are never going to like it. Okay, we conceded that. Over time you will grow to respect the process because it helps you increase your numbers and reach your full potential. So, Susan, just like that famous ubiquitous slogan commands: “Just do it!”

Warning: Typically, salespeople are not good at tracking these aspects at the front-end of the sales cycle. ‘Effective front-end activity’ by definition is not about being active, it’s predicated on doing the right thing, in front of the right audience, with the explicit goal of inking the right type of contracts for your company. Too many salespeople meet with people who are not in their target market. This is a major time waster! Now, what precisely should you track?

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Here's the problem: Too much tracking doesn't work either.

Salespeople won't do it if it isn't quick. You have to make the tracking work as a focusing mechanism. Keep this goal is sight at all times. At the bare minimum you should track how many referrals you received, how many people you contacted, how many appointments you landed, and how many of those meetings have the potential of baring fruit. Ramping up their Compliance Factor is the only option (through self-monitoring or accountability through their sales manager).

Think back to what we mentioned before about how high 'D' behaviors might backfire on you.

Best to dial-down that naturally elevated Dominance of yours a bit with new people on your initial interview and ratchet it up incrementally - especially when dealing with brand new clients and prospects who don't exhibit high 'D' traits. Many people, until trust and rapport have been established, might be put off by directness or sticking rigidly to your agenda. So be warned!

Also, Susan, remember that one of the tendencies of an individual (like yourself!) with a high level of Dominance is that you like to create a sense of urgency, drive toward goals, and meet objections head on. During the first meeting with clients, flexibility is important. Typically high Dominance behavior people are pretty direct and like to move in a straight line toward objectives. In the Sales Process, they have 'been there, done that'. They've been on Initial Interviews too many times to count and they know what the client will say even before the client thinks it. So, because you are experienced, and know the efficient way to get your clients' goals met in the most efficient manner, you might push too hard or answer questions too quickly. Be careful that you don't make it appear that you haven't listened or understood the client well.

Bottom line: You know how to get the deal done! That's why you are so great at sales and bringing in the business! But remember, we are talking about what is best during the Initial Interview phase. Those high 'D' characteristics can truly decrease your effectiveness in getting a second interview.

One way to establish if this might be a problem for you is to track the drop off percentages between Initial Interview and being granted the latitude to continue the Sales Process with your prospective clients. Compare your rates to those typical in your industry and to those of your peers. It might be eye-opening for a high 'D' to understand that a simple behavioral tweak during this stage can seriously impact the numbers in a positive way. For example, being willing to let go of the reins, to step back and listen, is vital for a High 'D' to remember during the first visit to a client. Review the Law of Benchmarking session in the 21 Laws of Influence for Sales eLearning Suite for other great ideas.

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Research and Discovery



The ideal is to have your S Factor in play. With your Steadiness dialed up, your need to explore the market and investigate whether this prospect is worthy of your efforts, resources, and time. By dialing down your D, you can focus on an adequate level of thoughtfulness during this phase. Dialing down the I lets you explore clients you might not have a nature 'liking' for, and Dialing down your C makes you look at the process as a blue ocean – with enhanced creativity.

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Research and Discovery is the process of Prospecting and gathering Competitive Intelligence.

The first step is to gather a qualified list of potential clients who might be interested in purchasing your product or service. You must diligently sift through and seek out those who have the means to actually initiate and/or sign a contract, make the purchase, or determine the set of decision makers within that environment who you might call upon.Susan, with your medium-to-low level of Steadiness Factor, you accurately realize that spending time researching new clients is something you should spend adequate time on.

You would naturally much rather spend time getting to know those clients in person.

Words of Caution: Researching new clients, creating a strategy for penetrating the marketplace, procuring high quality leads, and putting together a workable action plan are strengths that many salespeople lack (so you are not alone in this!).

Sales Coaching Advice: If you are on a Sales Team make sure that someone has the responsibility of getting this done. If you don't concentrate an appropriate amount of time and energy on this, it will be not only a detriment to your career goals (because you are not strategizing or planning enough); but it hurts the organization, too. NOTE: If you just pause and first think about how to best address the marketplace before you get underway, wouldn't it stand to reason that you would probably get in front of better or more viable prospects in the long run.

Sales Coaching Advice: Susan, now let's discuss your behavioral impulses. An area where individuals with Steadiness scores in your range might miss a beat is in the area of motivation. This is because the Steadiness Factor's 'pause mechanism' (your patience) is lower. As a comparison, a high Dominance Factor individual usually has too much drive. They tend to be "FIRE, ready, aim!" types. People with your score in Steadiness on the other hand tend to be more of a "Ready, aim, check your sight, now ready, aim, FIRE!" type.

Strength: There is a plus side to the fact that you are just below the mid-line in your Steadiness Factor. You are balanced – not too hasty, not too tentative. New and existing clients will feel somewhat at ease as you will exert an appropriate amount of pressure without making them feel uncomfortable.

This approach can result in you posting good numbers in new sales revenue as well as keeping adequate balance in your 'time to close' and client retention metrics. Examine your numbers year-over-year. You will most likely find that your strength (in this balance) is reflected here. Susan, you should be very proud of this!

Sales Coaching Advice: If this is your nature, please discuss this with your manager so they can help you employ this strength for the long haul. For the long term profitability of any organization, monitoring and keeping these key metrics in balance is critically important. Clearly a strong suit for you.

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Susan, when it comes to gathering information on new clients, organization is nice, but for you to excel, you don't necessarily think it's required.

This type of behavior is quite typical for a person with a lower level Compliance Factor. You think that you can easily wing it when doing Research and Discovery since you are great at figuring out how to attack your marketplace, gather new referrals, and generally fill your sales funnel with new prospects. But this 'winging it' isn't particularly prudent in the long run, even though you are convinced it might work best for your style.

We agree that with your low level of natural Compliance Factor you do indeed fare very well with researching new clients; as you have a quick, creative and entrepreneurial mindset. You will naturally gravitate to different ways of finding new clients and figuring out new market approaches. You are driven by going against the norm and in this way will see opportunities others often overlook. You know that through your efforts, and with your products and/or services, that clients could truly benefit – if only you could get in front of them for a presentation.

Although your Compliance Factor is in the medium-low range, it doesn't mean that you don't like to adhere to policies, it simply means that you are innovative. You are at the ready; willing to show clients new ways of doing things or novel ways to address an issue at hand. Your innovative thinking and willingness to do things differently is certainly a strength. This is especially true if you channel this raw natural talent into showing clients how - by changing - that they can make their lives and companies better. This is a strong selling attribute.

Here's the rub though: If you aren't methodical things will fall through the cracks in the Research and Discovery stage of the Sales Process. Without a systematic approach – something like having a Project 100 to make sure you are seeking out the most appropriate client mix, or an Indaba 57-like customer intelligence gathering mechanism, and/or a benchmarking system to ensure that your pipeline isn't slipping - how can you definitively know that you will better your last best? How can you possibly know – if you haven't focused on some aspects of a particular line of attacking your marketplace – that you aren't missing something? How will you know precisely where adjustments need to be made if you don't dial-up your Compliance Factor? Just asking… But I think you get the message.

Susan, you have your eyes on the prize and tend to focus on building relationships with new or potential clients based on what value you bring to the Sales Process - for the client and for your organization.

With your medium-to-low Influence factor, you tend to not waste time on chit-chat. Be careful though when you are in the initial stages of a new relationship with clients that you monitor your level of influencing and persuasion. During these crucial beginning stages, you **must** build a strong foundation here.

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During Research and Discovery, high Dominance types have a tendency to aim high - to target large sales.

It is normal to get excited about going after the biggest prospects, your elephants. Although there is nothing wrong with this, high D's (like you!) have to recognize that you should fill your pipeline with easier, quick wins, too. Always remember that you need to eat along the way. You need to maintain a balance between seeking the "game changer" sales and the everyday, pay-the-bills sales. The large sales are wonderful, however to get traction and sustain your motivation you will need to also focus on the daily smaller business sales.

Susan, the Steadiness Factor rules patience, planning, and strategy. When a person's score in this factor is medium-to-low, it usually signifies that they are confident in their abilities. In the Research and Discovery stage, being *overly* confident curtails a certain depth of thought and planning. Confident people by their nature think they are adequately prepared. They are champions of 'winging it'. They are typically fast on their feet and if their Influence Factor is high, able to talk their way out of most sticky situations.

Warning: People with a lower Steadiness Factor naturally assume that they have enough knowledge regarding their field of expertise. This certainly can be a profound strength; however, when you initially meet clients you need much more than confidence alone to make a fabulous first impression. You require thoughtful preparation, a winning strategy, and an action plan.

Sales Coaching Advice: This type of bias will not likely serve you well or set you up for success. It is neither logical nor does it have a high degree of practicality or common sense. Train yourself to take your time. For example, when conducting Research and Discovery, you should start with questions about the goal. Resist delving into aspects of discovery that aren't a logical fit for the end result. The better you become at this, the less time and resources you will tend to waste later in the Sales Process.

Strength: The type of thought process sets you and your team up for success might involve finding out:

1. who your ideal customer is
2. who you are going to ask for referrals
3. how you are going to get your foot in the door
4. how what you are offering fits
5. why you are offering it to your clients
6. you know the best way to present to ink the deal

Strength: Susan, if you figure this all out in advance of launching, you won't easily be sidetracked. The good news: Knowledge that you might be biased is half the battle. The other half is practical application: If you dial-up your Steadiness Factor appropriately, you will always be better prepared to reach your sales goals. You'll also be able to tackle each hurdle you face in an orderly manner, adjusting your process as needed.

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Mental Preparation



The ideal is to have your DC Factors in play. Your D will control your self-talk and steer it toward results – but at the appropriate mid- to high level. Your C has to be channeled at least to the mid-range to make sure you launch according to what already has been decided.

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Mental Preparation: Set Yourself Up for Success

Susan, the goal of this segment is to teach you how proper 'Mental Preparation' will dramatically increase your sales results.

Mental preparation helps you process decisions, overcome objections and adversity, and deal with minor obstacles before they become major problems. Mental rehearsal is the art of practicing what you plan to say or do in the future while in a targeted state of imagination. It is especially critical in thinking through the business development cycle, figuring out the best way to present, close the sale, or in putting together a workable marketing strategy.

If there is a common denominator shared by top performers it is their ability to consistently shape the future in a positive light. The best salespeople train themselves to imagine successful results; and then they see the fruits of their imagination become reality. The DISCflex™ Factors - and how you use them - can play a vital role in preparing your mind throughout the Sales Process. Each factor will help you prepare to deal with the various stages of the Sales Process and will also help you adjust to the diverse people you will have to influence during the Sales Process.

Habits of success are based on the Compliance Factor.

Susan, the Compliance Factor is centered on rules, processes, and doing things methodically. You usually think that you have enough knowledge garnered from your research under your belt. You'll convince yourself that even if you don't know it all, you do not really require much else before meeting with your client. Heck, you can always 'wing it'! When a person's score in this factor is medium-to-low, it usually signifies that you might be less structured than most in consistently setting yourself up for success. You tend to forget that just because you have prepared as much as you might feel necessary, spending just a bit more time thinking about what it is that you need to put in place -- as far as organization, procedures, policies, and systems might be a significant aspect in making sure you are adequately prepared and psyched up for every stage of the Sales Process.

Practices, rituals, and routines are an important part of success. Saying the same things to calm yourself before an appointment or introductory first call or writing down some salient points prior to every client meeting – these are two simple examples of how the Compliance Factor puts structure in place to set up great habit patterns.

Think about this example: If you have a tough time being on time for appointments (even knowing this will cause stress), perhaps doing things like not leaving adequate time for traffic delays or to find a parking spot in the city, a suggested solution is to budget an additional 15 minutes may reduce the chance that you might become stressed if something unplanned happens (as it inevitably does in life!).

Sales Coaching Advice: Dialing-up your Compliance Factor behaviors and figuring out some simple everyday habits to make sure you avoid getting yourself jammed up or in a tight spot is smart. Not taking the time to do so is exactly the opposite. Your choice, my friend!

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Mental Preparation: Set Yourself Up for Success

Susan, you finished your research.You have your Sales Strategy down and know precisely your 'Move Ahead Goals'. You're ready to launch and have scheduled a meeting with the client. A quick pat on the back is all you need to instill the confidence you need, but there's no one there to provide it! This is where mental preparation will make the difference for you. Because your Influence Factor score is below the mid-point, your ability to 'pump yourself up' is not something that comes naturally.

Sales Coaching Advice: Lining up your self-talk with the results you want is critical. If you can focus and learn how to dial-up your Influence Factor to 'self-influence' or 'self-persuade', you can build the self-confidence you need for any sales appointment quickly and easily.

Beware: The consequences for not harnessing positively tuned self-talk can severely impact your self-motivation and self-confidence, and as a result, your goals.

Susan, you tend not to need much prepping before meeting with a new client or delivering an important presentation.

You have a good deal of self-confidence in your abilities. You've done this before, you know what your product does, and you know it matches the client's needs. You don't think it will be a tough sale! And even if it is, you can handle objections and deliver the goods!

Sales Coaching Advice: Make certain that you temper your self-assuredness. Having too much confidence could result in being ill-prepared for unexpected bumps in the road. These will inevitably occur. Foster an appropriate balance between confidence versus planning and preparation. By dialing-up your Steadiness Factor behaviors and combining these with your naturally self-confident nature, this will help you sail through any meeting. This strategy should put this risk at bay.

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Building Trust and Rapport



By this time, you have already established the ‘friendliness’ you need, but you have to remember keep it at the correct level. Now, The ideal is to have your SC Factors in play. Steadiness will show the client that you are credible and worthy of their trust. Compliance will show accuracy and adherence to processes. Be very careful not to pop your D too high!

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Susan, in this segment we are going to focus on how to use your DISCflex™ Factors to build a high degree of trust and rapport, how to prep the client, and how to gather data effectively.

When you make a client feel comfortable, you will most likely be provided the opportunity to do business with them. It is necessary to establish rapport and trust when trying to influence. Your job is to determine the best way to accomplish this with different individuals. Your goal should be to develop a comfortable relationship with your clients where they look to you for advice and contact you when they are in the market for goods and services in your sector. When this happens you build customer loyalty that will be hard to unravel. One career-destroying result from lack of building adequate trust is that you won't receive referrals, resulting in your sales pipeline drying up.

Susan, individuals with a lower elevation Steadiness Factor don't need a great deal of consistency or routine in their professional dealings.

In fact, you probably detest the mundane or boring. You will particularly thrive when the sales field is generally dynamic in nature. That doesn't mean that you don't appreciate consistency in the fundamental areas in your sales environment, however, you don't need it to be effective.

Warning: Recognize that your clients might value things like: dependability, reliability, stability, composure, and calmness.

Because being consistent doesn't mean as much to you, you might forget to include some of these vital components in your Sales Process.

Sales Coaching Advice: In order to trust you enough to earn their business, your prospects might need to see dependability and consistency. Be aware that you have to find ways to display this and make it inherent in your Sales Cycle. Whether you present products and prove that they are consistently the best in class, or demonstrate reliability and consistency in the manner through which you interact with your clients, or deliver your sales pitch, you need to show clients that you are consistently dependable. Doing so instills trust and predictability for them.

Please remember this: Consistency and stability may in fact seem somewhat humdrum to you. However, for many of your clients, it gives them confidence they are making the right choice in doing business with you - because they know what they can expect from you and your company.

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Building Trust and Rapport

Susan, upon meeting new people you are not terribly extroverted or outgoing.

You tend to build a trust and rapport between your clients and yourself when you have an easily identifiable degree of commonality. When you find out that you live in the same town or have similar interests, attended the same university, or worked in the same industry, conversation is natural and smoother. Unfortunately, until you have this linkage, you feel a bit uncomfortable with small talk. This is quite common in people with a medium-to-low-range Influence Factor like yours.

Warning: This can hurt you during the Sales Cycle. People like you (with a lower Influence Factor) do tend to feel less comfortable - especially with newer clients - when they are first trying to figure out what those commonalities are. The good news: You can learn tactics and become proficient at rapport building in order to create a strong bond with clients.

Sales Coaching Advice: Study the eLearning lessons in 'How to Dial-Up Your Influence'. Applying the skills will compensate for your lower Influence Factor.

You tend to be upfront and direct when building trust and rapport with your clients.

With your highly elevated Dominance Factor, people can clearly see that you are a direct person. Your openness, the willingness to welcome conflict or difficult conversations, and take on tough challenges build confidence from other people's perception.

Warning: Susan, just be careful to monitor your directness. There is a thin line between being direct and open and being perceived as blunt. The former is welcomed, the latter to be avoided. You like to get down to business fairly quickly; not being one to waste time. You love getting things accomplished and propelling full steam ahead toward results. Plus, you have a natural inclination to trim irrelevant material out of your presentations and marketing materials. Be warned though, that this tendency may cause cognitive dissonance in clients. They might wonder why you are propelling full steam ahead without first explaining the details. This is particularly true when your client's Compliance or Steadiness Factor traits are apparent. When these are in play in the people you are attempting to persuade, they will not move forward until you have satisfied their desires along these lines. The key is to weave the desires of all DISC Factors into your trust building efforts.

You like to make decisions quickly when developing aspects of your relationship with clients, including trust and rapport.

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Gathering Data



The ideal is to have your IC Factors in play. Influence is your skill at understanding the clients from the CLIENT'S PERSPECTIVE – not yours! The C stops you from gathering too much unnecessary information. If your D is too high, you may steam ahead to quickly, without enough information to bolster your case. And finally, if your S is too high, you may never think you have enough facts and data to present (which is critical in moving the Sales Process along).

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In this section we'll uncover your behavioral preferences in the realm of Gathering Data.

Part of breaking down customer motivations is gaining a sense of the real drive behind a client's buying choices. This necessitates being remarkably competent at gathering information. The most successful business development professionals make gathering customer info an ongoing effort. Many business owners believe that customer information is limited to the usual lineup of sources — surveys, focus groups, feedback questionnaires, and the like. Those are indeed part of the overall effort, but gathering adequate customer information requires that your customers' behavior be a focal point of attention.

Listen to what the customers say, watch what they do, and encourage everyone around you to do the same. From there, take what you've seen and heard, couple it with information from other venues, and try to draw as complete a picture as possible of what those clients genuinely value and why. Assume what you have heard and observed is merely the tip of the iceberg. When it comes to behavior, you can't take everything at face value. The more you know, the better positioned you are to move beyond mere selling and establish a relationship that's far more deeply embedded. By being in tune with a person's behavior, and by gathering adequate data and info about what actions they might take and when, you can drill down to a rigorous interpretation of what is going on below the water line. This will certainly make sure you keep a step ahead of your competition!

Spend an adequate amount of time thinking through the expectations of your clients at as deep a level as possible.

Beware: Thoughtfulness in this stage is a prerequisite of a successful sales career. This is an area where Sales Coaches warn that if you do not take corrective action, you could wash out of the business development arena or sales profession. **Bottom line:** When gathering data, recognize it is vital to consider how much information you need to: help maintain trust, prove that you are worthy of getting the business, complete a sale or procure a contract. Your goal should always be to gather the appropriate amount and depth of information and data to achieve the results you need. Many of the best business development professionals in the world spend a great deal of time thinking along these lines.

The more information you collect in the beginning stages of the Sales Process, the better armed you are to serve the client. By collecting client 'care abouts', concerns, and criteria, you will be in a great position to thoughtfully match these to your products, services, features and benefits. This will help you create a winning strategy with solutions that precisely fit your customers' needs.

Make sure to gather more than just the "required" data. Train yourself to think about gathering intel in terms of how presenting that information will affect you, your clients, your product, etc. to best procure business and strengthen your client relationships.

You see the details of the data you collect, on clients or products, but you do not focus heavily on them.

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Gathering Data

Susan, you tend to look at the big picture when collecting data, whether about your client, a new lead, or your product.

Because you have a highly elevated Dominance score, you tend to prefer an overarching view to dealing with minutia. As such you might overlook details because you are focusing at the 33,000 ft. or 10,000 meter level.

Susan, be aware of this and be careful; this may keep you from learning key information about how your product or service might precisely fit with one or two critical benefits the client indicates they must have. If you fail to hear these, you might not include them in your presentation or proposal. Unfortunately, you might not be able - because you don't have the level of detail required - to nix your competitors because you are not solving the client's needs with precisely what they want or to put your offering out there in the best light possible.

Susan, when you gather data you have to make certain you dial-up your Influence Factor to look at what you are pulling together from the client's perspective.

People with medium-to-lower level of Influence Factor typically are good at Customer Intelligence Gathering from an analytical perspective. However, their natural talent at reading people is low and therefore has to be cultivated. This is the curse of lower elevations of natural Influence Factor: The ability to see things through other people's eyes is not as proficient as expected.

Ultimately, the information you gather about your clients will be used to enable several important functions throughout the Sales Process:

1. Gain trust
2. Maintain rapport
3. Know when to bring in subject matter experts or support personnel
4. Prepare for your presentation
5. Deliver your message
6. Answer objections to close the deal

The key lies in making sure that what you find fascinating is equally as relevant to your perspective client, and that it works well to accomplish your business development goals. People who are able to dial-up their Influence achieve all of those goals. They have honed their 'Influence Instinct'. This is a skill that you can learn.

There are a few things to be conscious of as you develop your skills in this area. As with any new skill, when you first start, you might go a bit overboard or become too enthusiastic in getting it just right. Temper your desire for perfection!

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Gathering Data

Beware: Too much information actually slows the process down and creates a cloud of confusion. Most clients don't have a lot of time to go through all the facts and data that you have gathered. They would much rather cut to the solution as quickly as possible (especially if their Dominance Factor is elevated). They want someone like you to solve their problems with your expertise. After all, that is why they will decide to buy from you.

Your job is to gather (and present) the relevant information – as concisely and quickly as possible. This is important for your sales career, too. Spending too much time gathering too much data isn't an effective trait of a great business developer. You have to gather enough to be effective in getting through the Sales Process efficiently - and then move on to the next sale.

Bottom line: An effective salesperson has to be out in the world meeting clients, networking, and making sales. Whenever possible avoid your penchant to handle too many details and gather too much data.

Warning: Engrave this fact deeply in your psyche! In most cases ineffective salespeople forget that too much information slows everything down, frequently bores or confuses the client, and is often not necessary for their job – closing the deal. Balance is the key. How do you know when you have enough data? Ask questions and gauge what type of client you dealing with. What are their DISCflex™ Factors?

For example: High Compliance Factor types require much more detail than high Dominance Factor types. There is no precise 'right or wrong' here.

Sales Coaching Advice: The key is: Clients have to see you go through adequate (in their eyes) data gathering in order to convince the client that you actually have enough information to fully understand their unique situation. If you scrimp on this aspect, they might not trust your process or as a result - your judgment. To avoid this, make sure that you are open and inquisitive about how much information they require to address their issues. This is different for every client. Also, explain that with your level of expertise and knowledge that you might be quite a bit quicker (or slower – depending on your governing DISCflex™ Factors) in suggesting solutions different than other salespeople have previously. Just taking the time to discuss this will nip this potential problem right in the bud. Trust me, you'll be glad you did!

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Presentation Skills



The ideal is to have your DI Factors in play. Influence is your skill at reading your audience and being customer focused. Your D builds confidence and makes you look poised. Even when your goal is to be adequately thoughtful, too high of an S makes a presenter look unsure of their answers. An elevated C can be perceived as being too rigid and being less personable than one would like.

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Presentation Skills

Susan, in this segment we are focusing on how to increase your effectiveness as a communicator during client presentations.

When a presenter communicates effectively they appear natural, relaxed and comfortable. They are adequately prepared. They look open and honest. Their words flow effortlessly from one topic to the next. They make easy eye contact and have no appearance of awkwardness. There is no sign of the usual physiological ‘defense mechanisms’ that we normally see at play when people are stressed or nervous. At this moment in your sales career, you may be a wonderful presenter and might use the points in this segment as a refresher. Or, you might think about changing your approach to how you present information altogether. Many people adjust to their audience based on what they learn about DISCflex™ flexing and morphing. People take in and process information based on how the four DISCflex™ Factors govern their thinking and behavior. Adapting to a prospect's behavioral style is critical. However, changing your style might not be an easy thing to accomplish if you are used to interacting with people in a “one size fits all” manner. Here's the bottom line on communicating: If you don’t present the way a person expects you to, your audience might become irritated by your approach. They’ll tune you out and put an end to your sales goals right then and there! Knowing how your DISCflex™ Factors affect your presentation abilities and also understanding how your audience's DISCflex™ Factors affect their listening and retention afterwards is important. This segment provides tips and Sales Coaching Advice so that you can adapt at will.

Susan, your Influence Factor is in the medium-to-lower elevation, so if you are scheduled to present to clients, you’ll tend to have a consistent plan.

You like being scripted and well-prepared. Getting ready by writing down highlights and perhaps rehearsing with note cards when making a presentation will serve your style well. This is your preference and it doesn’t mean that you aren’t quick on your feet or able to ad lib if the situation calls for it. Typically presenters with a lower level of Influence Factor take a bit longer to build trust when addressing an audience. They also need to hone their speaking skills in order to read an audience and keep them fully engaged.

Sales Coaching Advice: Business development personnel and sales people must be effective at making sales presentations to be reach their goals.

Warning: If you are uncomfortable making presentations it will stunt your sales aspirations. It is imperative to hone your speaking and communication abilities. Increasing tension levels and discussing things that might make the client feel uncomfortable is often a big part of the business development process. It’s not all unicorns and rainbows!

If it were easy, everyone would be able to bring in business and close effectively. Nowhere in the Sales Process is the Influence Factor more important than in making presentations to clients. Having the ability to make the client feel ‘just uncomfortable enough’ to systematically achieve all of the ‘Move Ahead Goals’ that you have mapped as part of your Sales Process - while still keeping a high level of rapport is important. Being able to present a convincing ‘closing pitch’ to the customer and getting them to the point where they will sign the contract is 'part art part science'. If someone with a lower-level Influence Factor can learn to 'dial-up' their skills in this area and are adept in striking this balance, they are invaluable to a sales team.

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Presentation Skills

With your low-to-medium level of Steadiness Factor, you might be tempted to 'wing it' during presentations.

Because this might have worked for you in the past, you might not adequately prepare for clients with the deep level of thoughtfulness (High Steadiness Factor types) that top sales performers bring to the table. This could get you in hot water so you have to make sure that your presentation addresses all four of the DISCflex™ Factors. The better you prepare to address people in the mode they are using, the better your presentations will hit the mark. In this way, you will communicate effectively, responding to clients effortlessly because you are well prepared to handle anything that comes your way.

Warning: Now that you understand how important this can be, let's look at the consequences for not doing this: An intuitive or unforeseen question from a client or supplier could temporarily derail your thought process. Business development and sales is a messy unpredictable series of events. Imagine the process to be much like setting up a rally of dominoes. If you dial up your thoughtfulness you will think through how the rally will progress. If you don't set it up properly, or if you lose your focus, you could topple a domino unintentionally, ruining all your efforts. Or the domino string could end prematurely because you didn't line one or two critical pieces up properly. The Sales Process works like this as well. Be okay with that. Just set up your 'Move Ahead' goals (your Domino rally) properly with an adequate amount of thoughtfulness and you should be just fine!

Remember, with your level of thoughtfulness, you could become immobilized because you think you are not prepared enough. This is called 'analysis paralysis' and is equally as unproductive as not thinking things through. You have to set the dominoes in motion. You have to take action. Otherwise why expend the effort in setting them up in the first place?

Honing your Influencing skills along with your Steadiness skills will go a long way in preparing you for what you cannot control. Being able to go with the flow, answer objections on the fly - but with a level of thoughtfulness that is clearly displayed when you speak, will be what persuades clients that you are trustworthy and contemplative -- even in the heat of battle.

Beware: Looking too thoughtful in 'real time' might come across as having a 'deer in the headlights look'. This trait is not attractive in a presenter. While the intention might be to 'think it through before you answer', your client expects you to know the answers to their questions instantly. They will judge you harshly if you take the amount of time that typically takes an ill-prepared or overly thoughtful presenter to answer their question. You have to be prepared – so make sure you spend a lot of time in a thoughtful, state prior to presenting to any client on any topic. Also, think of any client meeting as a mini-presentation. If you do, it might automatically remind you to dial up your Steadiness Factor.

Sales Coaching Advice: Finally, the best preparation for presentations is to do a dry run. Do your best to remove all possible risk of lack of thoughtfulness and the impression that you haven't adequately prepared from every one of your presentations. For example, because your Steadiness Factor is low, you might want to run important presentations past someone who is exactly your opposite in this area. They could provide invaluable insight in how to make your presentation look more appropriate to people with higher levels of Steadiness Factor traits. Use the same process to make sure your information resonates when the other factors are in play, too, if your levels are lower in those areas.

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Susan, you are very direct and like to focus on the main points during a presentation. Basically, you are a 'bottom line' person.

Beware: So here's the bottom line (with your highly elevated Dominance score): Customers need to feel comfortable and recognize that you are listening to them. The only way this will occur is if you stop talking and listen! You need to listen without a view to changing their mind. JUST LISTEN OPENLY!

Sales Coaching Advice: The most effective way to train yourself to listen is to teach yourself to ask questions, and then patiently wait for the answer. **Sample questions:** Is this feature something that you and your organization were exploring? Is this problem that you are faced with something that you think we might be able to help you with? How do you see the interface working? Do you think this product might help you with employee retention? These are open-ended questions that are non-confrontational and leave plenty of room for active dialog.

These types of inquiries also provide the client time to respond, while making the client think about working with you and your organization. If you listen carefully to their answers, you will often unearth a client's objections that can be addressed well prior to closing. You might see more clearly how the client thinks your solution fits their wants and needs. Even though you might think it rare, if you truly listen openly, you'll probably uncover some buying signals that will speed up the Sales Process!

Warning: If you skip over the features and benefits that are critically important to the client (because you haven't listened well or taken the time to discover what's important to them), they might not feel comfortable enough to go ahead with the order.

Now let's move on to how your Dominace Factor score affects 'Move Ahead Goals' during your presentations. If you are on a sales team, one of your 'Move Ahead Goals' might be to get the client to agree to a next step - perhaps making an appointment with your engineer or technical expert to meet theirs. To move forward, you have to make sure that you cover enough information in as much detail as the client requires in order for them to give your team the 'go ahead nod'. **Remember, Susan, this standard is the client's view of how much is expected, not yours. Often, people won't agree to your 'Move Ahead Goals' unless you prove that you have a grasp on an adequate amount of detail about your product, too. You never want the client to think that you are simply a 'door opener'. When it comes time to close, they will respect you more if you show your expertise and know about the details, too.**

Susan, now let's move on to how your medium-low Compliance Factor score affects your presentations. You like to take charge during presentations, and while you like to focus on the details, you understand that it is not always the best approach. You do understand that you have to provide information to your clients, but you really don't like to overwhelm them with too much. This is more about your selling style than their need for this.

Sales Coaching Advice: Understand that sometimes a client can ask for more information than you customarily provide because this is how they process. For example, highly-elevated Steadiness Factor folks like a preponderance amount of materials (in comparison to a typical high Dominance person). So, be understanding of different people's requirements and you will comfortably be prepared to handle such requests for additional information with grace. It is critical to understand your client/prospect won't move ahead to the next stage of the Sales Process unless their thirst for information is quaffed.

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Decision Making



The ideal is to have your DC Factors in play. This assumes that you are tracking to the appropriate decision making process. Your higher D will focus you on making the decision and moving forward. Your raised C will make certain you abide by the process and not chase the next shiny object. Lowering the I makes sense because you don't want to be influenced by everyone you talk to, just the ones that you should. A lower S helps when you might be tempted to overthink your decisions potentially stalling the Sales Process.

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In this segment, we will explore your characteristic decision making behaviors.

It is important to understand that people actually make decisions on a highly individual basis. The behaviors you exhibit to clients will help them work through the decision making or problem solving process. When you want to influence the decision clients make, isn't it wise to figure out precisely how people make decisions? Basically, it's a fundamental attribute of their behavior. If you can understand and dial up or dial down your DISCflex™ Factors appropriately, you can lock into a client's decision strategy. You can use your natural behavioral strengths to shape the process a person typically goes through in making the determination to go along with what you are proposing.

Susan, individuals with a medium-to-lower range Influence Factor like yours typically don't put much weight in taking a lot of time to build exceptionally deep or strong relationships with their clients.

If these do occur it is usually as a result of working together over a long period of time, rather than as a result of their initial sales strategy. Persuasion abilities, forming a trusting relationship, monitoring your level of influence with the client are all important in the Decision Making stage.

Having a medium-to-lower level of Influence Factor doesn't mean that you don't like dealing with people, it just means that you view the Sales Process as more of a business than as somewhere you make friendships. You do depend on a logical progression in making decisions, and do not make decisions based on 'gut feel' or emotions. As such, the fact that some clients want the decision to 'feel right' as well as 'be right' doesn't really make an impact on you. Even more foreign to your thinking are clients who 'go entirely by their gut'. Their internal voice says: "If it feels good, just do it!"

As far as you are concerned, the best decisions happen when people have done the research, reviewed the options, and come to an unbiased, unemotional, logical choice. As such, you tend to make sure that clients have all the facts at their disposal before they make their final decision. Note: your thoroughness and diligence could slow you down and frustrate clients. What would happen if you didn't read the signs that a client had already made the decision but you weren't ready yet?

Beware: Most lower range Influence Factor individuals wouldn't pick up on the fact that it was time to "Be quiet, take out the documents, and move ahead to closing." Especially with higher Dominance type personalities, with high Influence Factors in play, not recognizing 'buying signals' can be a fatal flaw in a medium-to-lower range Influence trait. It will result in you being out of sync with the tempo that the client wants to do business.

Being out of step in this critical area will frustrate the client - especially if their Dominance behaviors are elevated and they want to get the deal moving ahead. Watch for the signals that show you where the client is on the Transitional Time Line and adjust your plans accordingly. Use your 'Move Ahead Goals' and the associated Sales Strategy to make sure you stay in lock step with the client's pace.

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Decision Making

You would rather not be responsible for being the decision maker, but you can when required.

You put more of an emphasis on your relationship with your client when closing, rather than focusing on the sale itself. Try to hone your people skills and use your keen eye to decide the best way to approach a meeting with each client. If you see challenges as obstacles that is what they will become, analyzing yourself the way you do your clients and products will save you a lot of stress and you could reap the benefits with an increase in your numbers.

With your medium-low 'S' Susan, you prefer to make decisions based on how they will affect you.

You know enough about your new clients to make an informed decision as to whether or not your current methods will be successful in helping you acquire another sale. If you think your approach could use some tweaking give yourself enough to time to think up a new way to approach your client before you meet again.

Susan, you focus more on how the outcome of a decision will affect you rather than how it will affect other parties, like your clients. You are able to handle vastly different situations without much frustration, take the time to make sure you know your clients and your product well.

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Decision Making

Susan, you're extremely results oriented and this usually affects how you approach the decision making stage.

A tendency of a naturally elevated 'D' like yourself, is to be overly optimistic in their sales abilities throughout the Sales Cycle. By nature, you tend to focus on the big picture and as such might overlook some details that will be critical in the client's decision making.

The best way to ensure success is to balance your strong desire to come to a conclusion quickly with an adequate amount of tempered optimism and preparation. Make sure you can answer any question the client tosses your way while you are encouraging them that your product is what they need. Also, make sure that you monitor your optimism. If allowed free rein it might make you think that you don't have to prepare because you are so good at 'winging it'. This would be a mistake and could negatively affect you if you are dealing with a decision maker with elevated Steadiness (thoughtful) or Compliance (process-oriented) Factors.

Please remember: your client might have a naturally lower score, but could simply have 'dialed-up' either of these factors during one or another moments in your sales presentation.

Sales Coaching Advice: Never assume that just because you know that an individual is usually not in Compliance mode that they won't 'dial it up' on a short term basis. We all do this at one time or another -- so it is wise to prepare for it. Nothing beats a high level of preparation! It gives you confidence and displays to all that you are a true professional.

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Closing the Sale



The ideal is to have your DI Factors in play. Your D wants the sale! An enhanced Influence Factor is critical because you have to know precisely when to strike! You have to read the client well. This combination of DI is a delicate balance. What will hurt this balance? An elevated S might cause a slowdown that is not desirable during the closing phase of the Sales Process. A lower C is better because you will typically have more creativity and flexibility. This will ensure the client sees you as willing to work with them during any negotiations. Nowhere are the appropriate levels of DISC more important.

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Let's focus on closing skills and the behavior you would typically exhibit during this vital stage of the Sales Process.

There are special moments in the execution of the Sales Process when you simply can't afford not to ask for the order. The most successful sales people know exactly when to ask the right closing questions to book an appointment, get a referral, achieve their 'Move Ahead Goal', close the order, and get "ink on paper". Understanding your closing behaviors will make the difference in knowing when and how to ask for an order based on your distinct DISCflex™ Factors. Well-trained salespeople and business development professionals realize that they must play to their strengths and mitigate any potential weaknesses in this area – or suffer the consequences. This segment will help your understand If you understand how to harness your closing powers for maximum affect.

Susan, you are not terribly emotional or overly concerned with building deep personal relationships with your clients.

This is not necessarily a weakness because this inborn trait does assist you to a large extent during the closing stage of the Sales Process. Because you do not fear the repercussions of tension and stress that naturally occurs during this stage, you are willing to ask closing questions and it won't cause a tremendous amount of internal stress. In your mind, you are there to finish the task, bring in the business for your company and that means that you will focus on how best to close the sale.

Bottom line: You care more about the practical benefits of getting the deal done when closing; it's just another sale for you. When readying yourself for a closing meeting with a client, remember that building trust and rapport and fostering relationships at a deep level is typically not the strong suit for people with lower elevations of Influence Factor like yours.

Strength: It is important to realize that Influence and Compliance Factors tend to be polar opposites. This being the case, your strongest resource might be your ability to gather information, follow process, be logical, simplify or organize the solution so that the client clearly sees a way forward, or it might be that you methodically prepare for handling any objection that comes your way during the close. In your book, thorough preparation and sticking to process is a sure-fire way to provide understanding to your clients.

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Beware: That being the case, though, you really have to dial-up your lower level Influence Factor so that your other DISCflex™ Factors do not override it. Why? Because you need to connect and 'read' people in order to close them. And a stellar business developer characteristically requires a higher level of Influence Factor than yours is naturally in order to preserve solid client relationships. The number one reason people chose a vendor? People do business with people they like. Bearing this in mind, you will have to make it a point to dial-up that Influence Factor.

During the closing stages of the Sales Process, prepare not only for what you will say (and be perceiving as doing) on a relationship level using your Influence Factor, but how you will use the facts you have gathered (by dialing-up your Compliance Factor). Also, be prepared to choose and fearlessly deliver the 'right' words to 'close' the client effectively (elevating your Dominance and Influence Factors simultaneously).

Susan, study the section in the report that suggests appropriate words and tactics for closing. These will assist you in becoming more comfortable with closing tactics while still keeping close to your natural selling style – that of a medium to lower elevation Influence Factor. These techniques will help you elevate the appropriate DISCflex™ Factors during the closing stage of the Sales Process.

Susan, as it relates to closing, with a low-to-medium Compliance score, you are flexible and innovative.

However, you clearly must realize that changing the rules whenever the client asks you to is not always the best policy. Make sure your first inclination isn't to say "Yes, of course!" This isn't the best way to match the client's Compliance Factor – by dialing your 'C' up in a way that taxes your organization's delivery and customer service departments.

Sales Coaching Advice: Whenever you think about making an exception to current policy, analyze the pros and cons before committing you or anyone else on your team. Think about what this will mean to others in your organization. You do want to please your customer, but make sure that you balance your innate customer-focused tendency with a high level of thoughtfulness about the internal mechanics by dialing-up your Steadiness Factor. This combination and understanding can be a formidable force. Doing this on a consistent basis will help establish a high level of trust between you and your clients. Ultimately, keeping certain standards makes closing easier, not more difficult. Plus, it will also make sure that you don't have too many tense meetings in your sales manager's office!

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Closing the Sale

You tend to have tunnel-vision when closing - you prefer speed.

Susan, you like to see results.

In your world, the quicker and more efficiently you can close a deal, the better!

Beware: Closing should be accomplished with a bit of finesse and thoughtfulness. The best way to 'close' is for the client to logically come to the conclusion that they want to do business with you. This type of 'close' occurs when all the factors have dialed-up and dialed-back throughout the Sales Process.

At the final stages, it is important to keep your High 'D' in check. Closing too forcefully can actually have the opposite effect that you desire. It may break trust down and 'scare off' the client!

Sales Coaching Advice: The most important thing you can do in the closing stage is watch for clues, react appropriately to the signals clients give, and subtly lead them along, rather than 'push'.

Set up your 'closing statements'. At each stage of the Sales Process, you should make sure that your 'Move Ahead Goals' have been accomplished - that you have 'closed these out'.

For example: If you know that part of the closing process is to find out when the client wants to implement the solution through the potential acquisition of your product or service, don't wait until the final closing statement to ask about this. Instead, close along the way - subtly taking care of any potential obstacles or objections as they arise.

By strategically preparing for these 'openers to closing' to come up during the earlier phases of the Sales Process, the 'close' should become more of a matter of reiterating what the client has agreed to over the course of your discussions, than a matter of addressing and responding to objections. In this way, you will never risk that your High Dominance might be unleashed, potentially nixing your sale.

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Closing the Sale

Susan, you enjoy the success of a close because it validates the case for the solution you are able to bring to the buyer.

The awareness that closing creates tension does not disturb you in the least. As your Influence Factor is lower, unless you have purposefully learned the skill. When tension escalates between you and your client, you might miss its subtleties. If you have been in business development or sales for a long time, you have probably found that you have to watch carefully for changes in rapport during the closing stages of the Sales Process. If you don't monitor rapport throughout the Sales Process, by the time you are at the closing stage, clients might not feel comfortable enough to proceed through to signing the contract. Customers want to do business with salespeople they trust.

Sales Coaching Advice: Practice this: Elevate your Influence Factor in conjunction with dialing-up your Dominance behaviors. If you are able to do so at will, you will be viewed as the type of person who is extremely comfortable with asking closing questions. When you use 'D' and 'I' together – having them both work harmoniously – you will be successful at:

1. Keeping the client comfortable.
2. Maintaining a high level of trust and rapport and alleviating any personal stress you might otherwise feel. If you continually focus on this you will most certainly increase your closing and persistency ratios (resell rate).

If you have a few years of sales experience under your belt, or if you have been trained well or have been mentored by a high quality sales executive or manager, dialing up your 'D' and 'I' together should come especially easy to you.

Also, make sure that you don't depend entirely on 'D' and 'I' to close. Every one of the DISCflex™ Factors is important at different points of the Sales Process so that when it comes time to 'close' the client feels naturally compelled to do business with you. They will feel this way because you use your four DISCflex™ Factors harmoniously to close the deal.

Enlist your Dominance Factor to strive toward results and to achieve your 'Move Ahead Goals' throughout the Sales Process. Call on your Influence Factor to establish a solid relationship underpinned with trust and rapport. Ramp up your Steadiness Factor at the appropriate moments to gain a comprehensive understanding of your clients' needs and to put together a winning strategy to solve their current issues based on thoughtfulness and logic. Finally, dial-up your Compliance Factor to gather sufficient details - all the while remaining within the guidelines for selling your products and services.

Remember: Your Compliance Factor makes certain that you move methodically forward at each stage; eventually culminating in getting the contracts signed or the sale completed. So, by combining the DISCflex™ Factors appropriately you truly have a perfect melding of behaviors leading toward the goal – closing the sale.

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How You Can Dial Up Less Apparent DISCflex™ Factors to Build Better Relationships with Clients

Susan, here is a list of how you can build better relationships with others. A vital key for being successful throughout the Sales Process lies in appropriately monitoring your DISCflex™ Factors. With this concept in mind, here are suggestions for ways to capitalize on the strengths of your governing DISCflex™ Factors, and/or to adjust the levels of your combinations to mitigate their potential negative effects:

To dial up your Dominance Factor or capitalize on your strength:

Show your enthusiasm and passion! Put it out there! Explain why your product or service is important to you personally. In this way people will know that your truly care about what solutions and products you can provide them. Clients like to see passion in the people they do business with and through this they will often reflect your enthusiasm about quality or value of what you are showing. Always be mindful of how another person will receive your message though; there is a fine line between enthusiasm and pushiness or over-eagerness in the Sales Process. Be wary to temper that Dominance Factor's capacity to sometimes overpower!

To dial up your Influence Factor and dial down your Dominance Factor:

Be friendly with the client before diving straight into business. Talk a little bit about yourself in a personal light, and ask about the client's interests. Try to find out about those things they care about – even if these are not business related. Sports, children, family, hobbies, and outside interests all are important in building relationships.

Here's how you dial up your Steadiness Factor:

If you think the customer may have a concern about something, if you think something may potentially go wrong in the sale because of something the client says, or if you think you may misunderstand the client, make sure you get everything out in the open and cleared up right away. If you perceive something like this and fail to speak up about it, the client will later wonder why you never mentioned anything once something clearly foreseeable goes wrong. The bottom line: Make sure your 'D' and 'S' Factors are working in harmony: Say what you are thinking – especially if this helps the client understand the pros and cons of the decisions they are making. If something comes to your mind that you aren't saying, the customer will likely perceive that (it's amazing what people read through body language!) and they 'feel' as though you are being completely forthcoming or not telling them everything they need to know to make an informed decision.

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Relationship Building

Whenever you want to dial up your Compliance Factor behaviors think about modeling someone who has a keen eye for details, policies, rules, and the like.

By behaving like a high Compliance Factor individual, you can capitalize on the strengths inherent in this type of person. In the Sales Process there traits are rather necessary to make certain that all goes according to plan and nothing falls through the cracks. You are undoubtedly capable of making sure that all the t's are crossed and all the i's dotted, but it might take a bit of concentration at first (before these behaviors become habits).

Compliance Factor characteristics are highly desirable in a salesperson – especially in a complex sales environment or when handling contract complicated negotiations.

To sustain your Compliance Factor at a dialed up level, keep an eye open for any small details that may potentially ruin the overall sales plan. If you can save the client even more money than they thought, or if you can prevent something horribly unexpected from happening, the client will respect and trust you for bringing it to their attention. This is equally true for fellow members of your sales team. Bring your strength to the table to make sure everything stays on track and goes according to plan.

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How You Can Dial Down Governing DISCflex™ Factors to Build Better Relationships with Clients

Susan, here is a list of how you can build better relationships with others. A vital key for being successful throughout the Sales Process lies in appropriately monitoring your DISCflex™ Factors. With this concept in mind, here are suggestions for ways to adjust the levels of your combinations to mitigate the potential negative effects of your governing factors:

Never take complete control of the Sales Process.

For example: Support the decision making ability of others. Do some research prior to meeting with the client to discover what might be important to him. In this way, you will much more easily be able to relate to his issues and concerns, which will give your client the feeling that trust is developing seemingly without much effort.

Be prepared and organized when presenting ideas to others and keep to your goals in the Sales Process.

But remember this: Tone down your natural determination to sell, sell, sell. When you meet with a potential client, you must represent your product and service but at the same time make a great personal impression. Clients prefer to buy from people they feel comfortable with. If all you seem to do is push your product or service without adequately forming a pleasant business-like relationship, they will not be inclined to schedule a second meeting. And that means you will not get the opportunity to seal the deal. Small talk is useful in toning down any perceptions that you are there for the sole purpose of getting them to sign a contract or buy from you.

Make sure to allot time for topics that others care about; don't make it solely about your product or service.

Connecting is important but your naturally higher Dominance Factor style loves getting things accomplished and striking a deal. When the client begins talking about something irrelevant to your product, dial down your desire to be so focused on outcomes and grant them the latitude to chat a bit about what is important to them. At a bare minimum, even when time is short, briefly make the effort to talk with them about whatever they are thinking about before gently returning their attention to the business at hand. Respectfully and subtly steer them back to the Sales Process with tactics like pointing out that you are being respectful of the time constraints they have, gently nudging back to your agenda points by. This technique will help you build a high level of trust and rapport while still achieving your sales objectives.

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Dominance Factor: Engage in respectful debate.

Instead of having a goal to prevail in your opinions; let winning be a secondary thought. Switch your thinking: Make your primary focus a goal of understanding the other person's viewpoint. Often, if you are okay with the thought of 'agreeing to disagree', you will win out in the end with a much more solid relationship. Always ask" "Is this a battle I need to fight to win my relationship building goals?" Most often the answer is "NO!" Because your Dominance Factor is high, make sure that you monitor your conversations with clients, especially when these become akin to debates – where points of discrepancy or differences arise. Winning every debate might not winyou the business! Especially when another person's Dominance Factor is in play, avoid any trace of "needing to win" or condescension whatsoever (even if you know they are completely misinformed or in the wrong). If the customer senses that you are using even the slightest tone of superiority, they might not want to establish any sort of business relationship with you or your company. Clients need to think that they are on level ground with you; and some require knowledge that you are always willing to take a second chair to their position. If you are willing to do this, it signals that you are ready to serve and be a service-minded, client-focused provider. And that's winning strategy in any client's book.

Dominance Factor: Results are your primary success motivator but temper your driving nature by never taking complete control of the Sales Process.

For example: Support the decision making ability of others. Do some research prior to meeting with the client to discover what might be important to him. In this way, you will much more easily be able to relate to his issues and concerns, which will give your client the feeling that trust is developing seemingly without much effort. Become more social and take a genuine interest in what other people's preferences, care abouts, and interests are. Often people with lower Influence and Steadiness Factors forget to make small talk or share stories about themselves; preferring to keep chat more on a business level. If the client mentions something that you can relate to, remind yourself that this is an opening to solidify your relationship further. It is crucial to establish common ground between you and your clients. Sharing information is a great way for someone with an elevated Dominance Factor to gain trust with prospective clients.

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Susan, you are motivated and inspired by how your DISCflex™ Factors play out.

Below is a list of what generally tends to propel you to take action, sustains your motivation, or inspires you to go the extra mile in a sales environment. This segment will help you better understand your underlying motivational factors. **You are motivated and inspired by:**

New and uncharted projects that no one else has thought of before

You love innovation. When given the choice between rigorous criteria and room to find your own way to do things, you will almost always choose the latter.

Being in control of situations - both professionally and personally

When you are in control of events, schedules, planning, and running things, you are fueled to get things done. Your motivation level is very high when you are in control.

Being thought of by others as an authority figure or as a figure of respect

You like when others genuinely respect you. You strive to be the person that others follow, and you have no problem voicing your opinion when you think something must be said.

The chance to develop ideas into workable project plans

Brainstorming is not enough for you. You have a natural inclination to start putting things into a workable plan.

Decision making power in work responsibilities

You are **much** more motivated when you have the final say for the decisions that are made in a group and individual decisions that affect you.

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Primary Motivational Elements

The six Primary Motivational Elements determine how your DISC scores affect your behavior.

Our behaviors to a large extent are formed by weighing and ranking what we value. Your unique core values (and there are many of these that are important!), combined with your behavioral preferences, will indeed play a large part in your self-talk, personal awareness, and internal thinking, as well as in your decision making and actions. The theory: That which you value will motivate you.

Primary Motivational Elements:

1. Utility and Practicality
2. Theoretical Understanding and Knowledge Acquisition
3. Traditions and Order
4. Social Interactions, Interdependence, and Trust
5. Individualism and Independence
6. Aesthetic and Unity

Your ranking is described as being:

Passionate: Fanatical, Fervent, or Enthusiastic
Compelling: Obligated by conscience or having self-inducement to make some effort
Situational: Decide to take action based on the situation or based upon the unique goal, this can be changeable, when discharging duties on a situational basis the person tends not to do so fervently or in an overly emotionally or invested manner
Indifferent: Having no preference one way or another

Six Motivational Elements Defined

Utility and Practicality

When people value utility, they judge value by how useful they evaluate it in their own way according to what they deem is important at that particular moment. Utility might be measured by how suitable something is in the achievement of a goal or in terms of functional application. Usefulness might be viewed in terms of how beneficial or advantageous the entity or assignment is. People who deem that utility is important to them typically prefer function over form (but this doesn't mean that this entirely discounts form!). To people with a high level of Utility and Practicality, they believe that something must exist for a reason; not just for show. They judge quality in terms of functionality, practical application, working effectiveness and convenience, and/or operational efficacy. *"If it works just fine, it really doesn't matter how it looks."* Whenever an individual is assessing Utility and Practicality, they must view through the lens of providing some form of return on the investment of time, resources, money, or effort. As you can imagine, the economical element of Utility and Practicality is of great consequence for this judgment.

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Theoretical Understanding and Knowledge Acquisition

In the context of Primary Motivational Elements, this category focuses on the amount of knowledge or expertise a person thinks they have to have in order to effectively discharge their duties. Most don't like to be ignorant or uninformed, but the level of understanding is a determinant of motivation. If the individual requires a high level of this element they will seek to become experts and maven. It determines the degree of comprehension you need about how things fit together. A high desire for Theoretical Understanding determines the awareness one has about their current level of comfortableness about the information they need to become successful. This determines how much understanding a person requires. Also, the know-how, expertise, skill, facts, data, or analysis an individual feels comfortable with before they are motivated to take action. Everyone has unique requirements in this area.

Traditions and Order

When we define the Primary Motivational Elements of Traditions and Order we discuss things like the level of acquiescence or agreement among individuals. This element centers on societal norms and cultural observance. It determines the degree of submission an individual will have as it relates to their willingness to submit, yield to, or comply with the expectations of an organization or team.

Social Interactions, Interdependence, and Trust

People with a strong sense of community are passionate in this Primary Motivational Element. Like 'get-together' work environments and working on teams. They enjoy discussions regarding work efforts, and insist on sharing communication and information. They like teamwork, seek common understanding, are personable, and must have a certain amount of 'comfortableness' with people. Trust and being a team member/player is important to them.

Individualism and Independence

For this Primary Motivational Element, the words original, distinctive, unique, individuality and self-government spring to mind. People with a high level of Individualism prefer to keep things impersonal. They command an elevated level of objectivity, neutrality, impartiality, and autonomy. Independence is critical to this type of person. These individuals don't easily subject to other people's domination and place a high value on self-determination and self-reliance. They work well free from the constraints of micromanagement; nor will they (as leaders) micromanage. In some instances, they are eccentric and shun the constraints of conventionality.

Aesthetics and Unity

People who value aesthetics and harmony judge practicality in terms of 'marrying substance and form'. Something can be the most functional invention ever created but if it doesn't have form and beauty in its utility it will not be as valued. To best understand this, think about a plastic spoon versus an exquisite silver spoon crafted by an artisan. Both can be used to ladle food onto a plate; but the person who places a high value on aesthetics will deem the finely crafted spoon as exceedingly more pleasing. Therefore this type of person would be less likely to ever use (and be satisfied with using) a plastic spoon if they know that there are more agreeable spoons available. They believe that Aesthetics and Unity must both be present – to coexist to create an overall harmony.

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Primary Motivational Elements

Now, Susan, let's discuss precisely how these six values-based preferences and thinking patterns might affect your behavioral choices.

Your Ranking:

1st	Individualism and Independence	**Passionate**
2nd	Utility and Practicality	**Passionate**
3rd	Knowledge Acquisition and Theoretical Understanding	**Situational**
4th	Traditions and Order	**Situational**
5th	Social Interactions, Interdependence, and Trust	**Indifferent**
6th	Aesthetics and Unity	**Indifferent**

In your case, Susan, it is your Dominance Factor that presides. Your strong Dominance Factor provides the momentum that drives your value-based decision making. Putting together workable project plans truly motivates you! You love seeing things get done and place a high value on accomplishing your goals. Passionate is a good word to describe this.

1: Individualism and Independence: **Passionate**

To be stimulated to take action, you relish the ability to work alone on tasks according to your own expectations. Susan, you also like to be in charge. You are results driven and time sensitive. You love a challenge. New and uncharted projects that no one else has thought of before excite you. We rank you as Passionate in this category.

2: Utility and Practicality: **Passionate**

Susan, your strong sense of purpose and drive come across as focused and determined because of the powerful influence of your Dominance Factor. The opportunity to develop ideas into workable project plans truly motivates you! You love seeing things get done and place a high value on accomplishing your goals. Passionate is a good word to describe this.

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3: Knowledge Acquisition and Theoretical Understanding: **Situational**

Being in control of situations (both professionally and personally) is important to you. For people like you, with an elevated Dominance Factor, it is important to acquire enough information to successfully accomplish your goals. However, Susan, it is not in your nature to stop moving forward just because you don't have all the relevant information. Because of this your desire for knowledge and theoretical understanding will be Situational. You tend not to be patient – rather choosing to spring into action. You have probably found that while this gets things accomplished, it can also get you into hot water! A more behaviorally astute individual understands how important it is to have a solid grasp and theoretical understanding of what they are charged to do. As a person's elevated Dominance Factor behavioral style matures, their level of theoretical acquisition – their desire to learn more and plan more before launching – increases appropriately according to their level of responsibility and is increasingly aligned (applicably and relevantly) to the task at hand. It is definitely your nature to view this category as Situational.

4: Traditions and Order: **Situational**

Being thought of by others as an authority figure or as a figure of respect is important to you, but in this category of Traditions and Order, you are Situational. However, this is tempered with one caveat: You don't like to disappoint those you respect. Susan, you insist on decision making power commensurate with your work responsibilities. If you don't have this, your Dominance Factor will insist on getting it. You like new challenges and being able to solve problems in highly stressful situations. Make sure that you don't remain in firefighting mode as a habit!

5: Social Interactions, Interdependence, and Trust: **Indifferent**

In order to be at your most productive and motivated, you prefer determining what the realistic constraints and timelines are for all of the people involved. However, you are not fixated on social interactions. You like having the ability to delegate tasks to others, but it is not required that you work in a team environment. Having a linear timeline with focus points on a project is most important to you. Susan, you believe that the correct process can hold people accountable and therefore trust, while important, is not a necessity to get the job done. A lack of trust won't stop you from having internal motivation. In this regard for the category of Social Interactions, Interdependence, and Trust, your ranking is Indifferent.

6: Aesthetics and Unity: **Indifferent**

When working on long term projects or in a stable team environment, you require high levels of accountability and results orientation between team members. Susan, you undoubtedly have high standards in work efforts. You value getting the job done above harmony or orderliness, attractiveness or desirability. You are Indifferent about this.

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Susan's Sales Improvement Action Plan

Now that you have gained significant insight into your behavioral selling style, it's time to create a Sales Improvement Action Plan. This process will help you significantly improve your selling skills. By following the steps you set in your Sales Improvement Action Plan, you will gain competence and mastery in adapting your behavior to each situation you face in the Sales Process. Most importantly, you can learn the skills for situational adapting – like a chameleon on a rainbow – without changing your core values or natural behavioral tendencies.

The first step is to identify some people who can provide feedback on their perception of your behaviors in a sales context. Getting third party perceptions is a critical component in professional development – especially in the area of a person's impression of how you comport yourself during all phases of the Sales Process. The feedback you receive may highlight perceptual gaps in areas like influencing skills, communication, or understanding the appropriate behaviors to employ. The feedback may also provide validation for you, providing a check and balance that what you perceive about yourself is actually the same as what others perceive. Most important, the data will quantify the differences (if any) between your self-perception and the third party perceptions.

Use the space below to write 10 steps you can take to improve your selling strategy:

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

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Sales Improvement Action Plan

Before starting the eLearning, you should take a few minutes to identify some of your perceived strengths and weaknesses in order to successfully apply the eLearning components to your life.

My top 5 **perceived strengths** are:

1.
2.
3.
4.
5.

My top 5 **perceived weaknesses** are:

1.
2.
3.
4.
5.

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Sales Improvement Action Plan

As you move toward enhancing your sales skills, determine what you want to adjust situationally for various clients and think about any skills that you want to become engrained as habits. Forming new habits and getting rid of old behaviors is called long term behavioral morphing. With both situational flexing and long term behavioral morphing, you will need to study each of the DISCflex™ Factors and Sub-factors. For each DISCflex™ Factor and Sub-factor, the eLearning will provide you with specific tools, knowledge, instructions, and activities that will help you determine precisely how to dial up and dial down each one.

Most people find that all four of the primary DISCflex™ Factors and all twelve of the DISCflex™ Sub-factors are useful in their lives as they help them achieve different types of goals. Others find that a few of the DISCflex™ Sub-factors aren't entirely necessary to their life goals at the moment and instead they focus on the factors and sub-factors that pertain the most to their life.

Take the time right now to list 5 goals that you want to achieve:

1.
2.
3.
4.
5.

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Susan’s Self-Improvement Action Plan

As you continue to set and reach your goals, you will want to continually track how you believe your skills are improving. Remember that you need to separate this into two sections: Situational Behavioral Flexing and Long-term Behavioral Morphing.

Situational Behavioral Flexing

You will need to learn to dial each sub-factor up and down depending on the situation you are in. Different sub-factors may be necessary in different situations. Use your best judgment. Trial and error will greatly help you learn which sub-factors are necessary in which specific situations in your life.

Long-term Behavioral Morphing

Once you master the art of situational behavioral flexing, you will be able to incorporate those behaviors into your natural tendencies, if you so choose. Long-term behavioral morphing allows you to change the overall behavior patterns in your life.

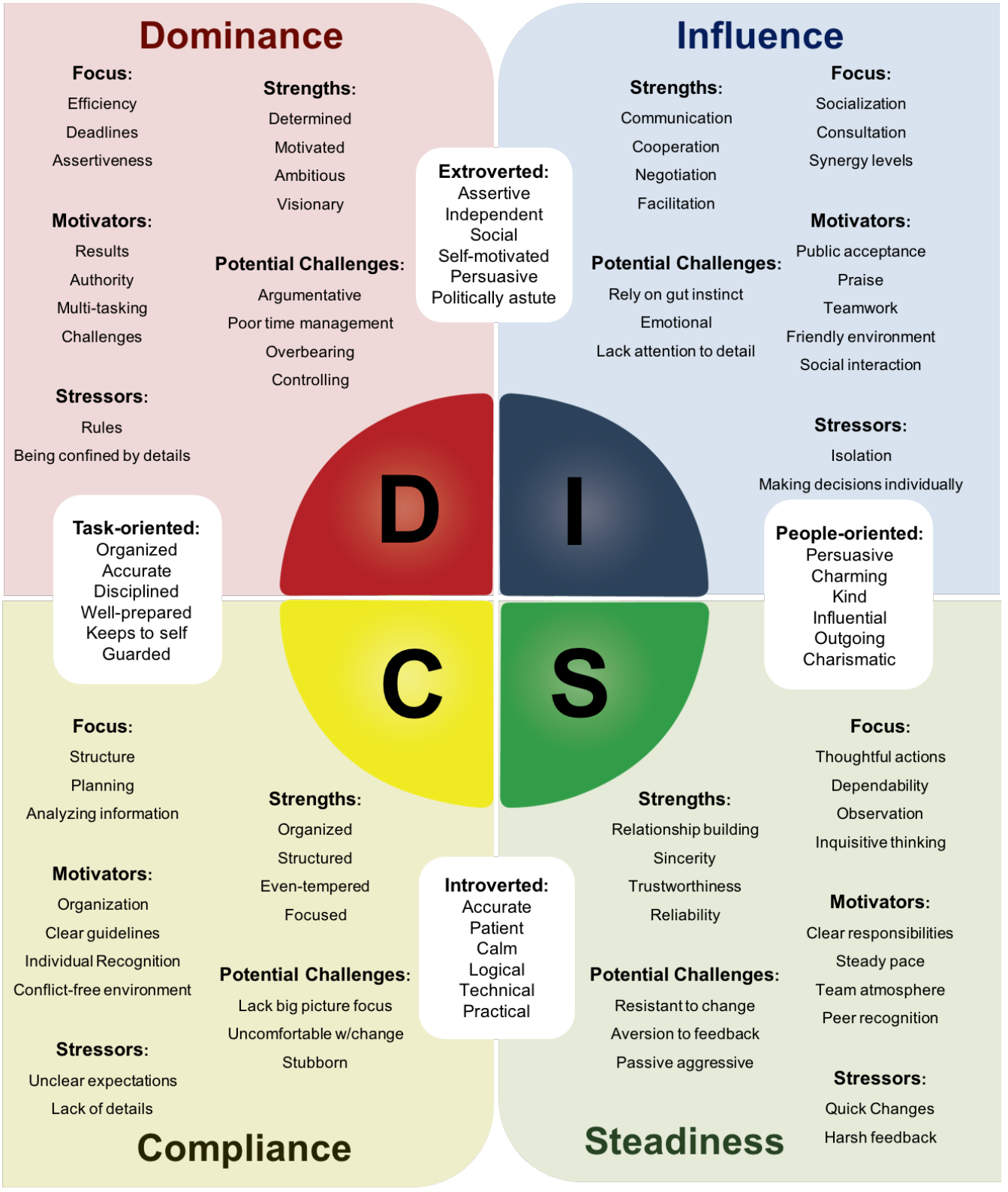
What characteristics or behaviors would you like to improve in yourself?

Now, click the "Invite Others" button on your DISCflex™ Sales dashboard.

Enter the names and email addresses of your coworkers, sales manager or coach, family members, and friends - and perhaps a few trusted customers - and they will receive an email asking them to take a DISCflex™ Questionnaire about you.

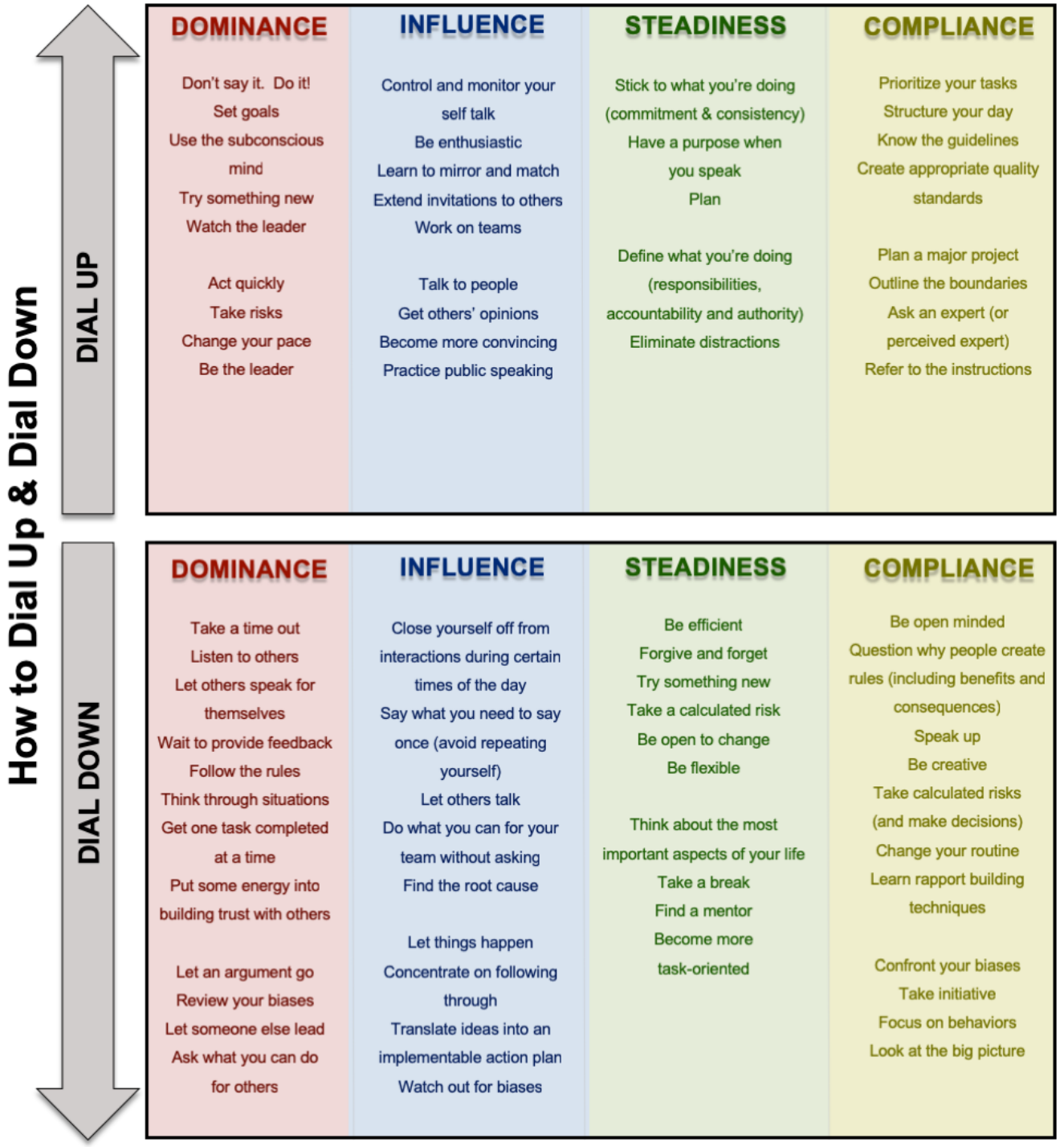
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Defining DISC Quick Reference



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Dialing DISC Quick Reference



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DISCflex™ Quick Reference

	DOMINANCE	INFLUENCE	STEADINESS	COMPLIANCE
Strengths	Determined Motivated Ambitious Visionary	Social Skills Influence & communication Cooperation Negotiation & facilitation	Build strong relationships Sincerity & trustworthiness Reliable Logical	Organized & structured Even-tempered Focused Responsible
Potential Weaknesses	Argumentative My way or the highway Overbearing Controlling	Reliance on gut instinct Insecure Lack attention to detail May let deadlines slip	Resistant to change Dislike giving or receiving feedback Passive-aggressive Possibility to be self-absorbed	Lack big picture focus Uncomfortable with change Confined by procedures Stubborn
Motivators	Results Authority Multi-tasking Challenges	Acceptance & praise Peaceful & friendly environment Working with others Social situations	Clear responsibilities Steady pace Group environment Recognition	Organizational effectiveness Defined tasks/responsibilities Recognition & reassurance Conflict-free environment
Stressors	Inaction Rules No decisions being made Being confined by details	Isolation Lack of communication Making decisions individually	Quick changes Harsh feedback Taking sudden action Unclear communication	Insufficient planning Multi-tasking Not knowing expectations Lack of detail or information
Communication Style	Important information only No idle chatter Big picture focus	Discussing information Talking through options Brainstorming	Prefer meaningful communication Status updates Thoughtful dialogue	Details and logical answers Cover all possibilities Clear expectations
Decision Making	Quick to decide & act Comfortable with risks Decisions are based on the big picture Prefer authoritative decisions	Receive feedback from others before acting Rely on gut instinct Prefer to know how others would act Prefer consensus decisions	Prefer practical options Hesitant to act Need contingency plan Prefer ad hoc decisions	Focused on facts rather than feelings Prefers to get all the facts Prefer fact-finding over making the final decision Prefer rational decisions

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