

## Personalized Description and Success Strategies

- General Characteristics
- Strategies for Creating a Positive Relationship
- Relating to People and the Environment
- Strategies for Managing
- Approach to Managing Others
- Strategies for Sales Management
- Approach to Selling

### Respondent Name

Wednesday, June 29, 2005

This report is provided by:

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The Norquest Team

Doreen Blake

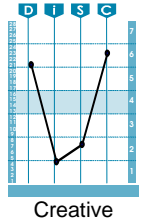
[dblake@norquestlearning.com](mailto:dblake@norquestlearning.com)





# Behavioral Highlights

This section lists the potential strengths of Sample's behavioral profile. Personalize the information using these steps: <1> Put a check mark next to the statements that you think accurately describe Sample's behavioral style. <2> Put an X next to the statements that you feel do not describe Sample's behavioral style very well. <3> Write in comments to modify the statements to make them more descriptive.

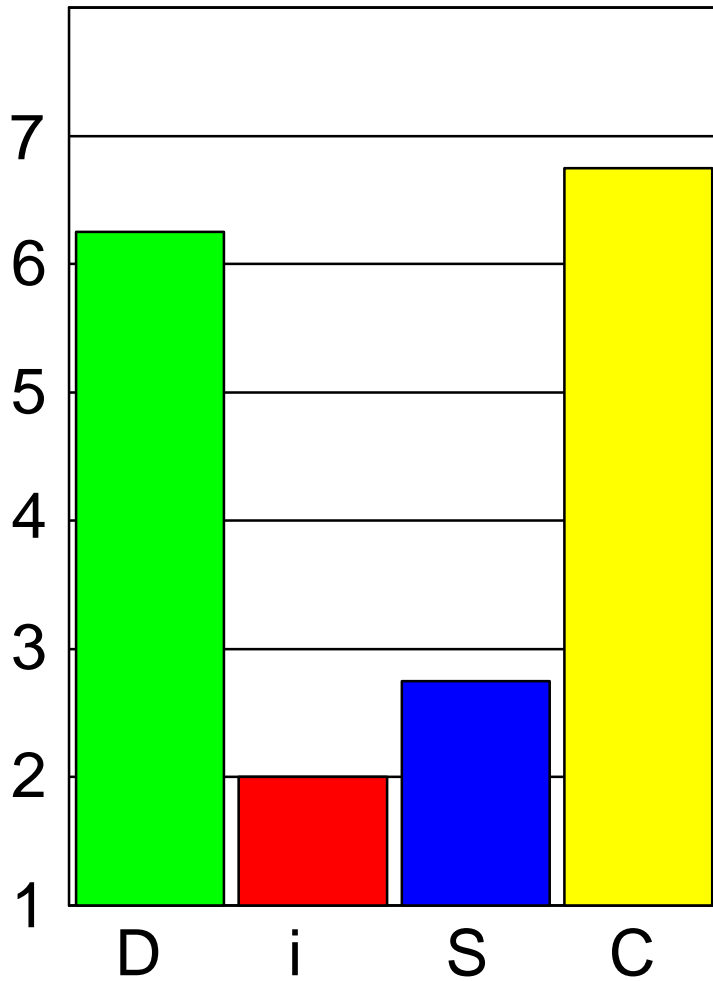


## Some of Sample's behavioral strengths may be:

- Analyzes situations or problems, weighing the pros and cons
- Values accuracy, quality and correctness
- Systematic in his approach to situations or activities
- Tactful and diplomatic in his interactions with others
- Uses subtle or indirect approaches to resolving conflict
- Likes a fast pace, new activities, change, and variety
- Quick to act and creates a sense of urgency in others
- Enjoys challenges and competition
- Can move forcefully to get results
- Uses direct, action-oriented approach to solving problems



# Personal Profile System<sup>®</sup> Graph



The DiSC<sup>®</sup> Dimensions of Behavior model describes behavioral patterns in terms of four tendencies. They are briefly defined below:

**D Dominance:** People with a high "D" behavioral tendency seek to shape their environment by overcoming opposition to accomplish results

**i Influence:** People with a high "i" behavioral tendency seek to shape their environment by influencing or persuading others.

**S Steadiness:** People with high "S" behavioral tendency seek to cooperate with others to carry out their tasks.

**C Conscientiousness:** People with high "C" behavioral tendency seek to work within existing circumstances to ensure quality and accuracy.

All people have all four behavioral tendencies but in differing intensities. The relationship of the four tendencies to each other creates a profile pattern which provides information about a person's potential behavioral responses.

Name: Sample Report  
 Date: 1/19/2004  
 Classical Pattern: Creative

Completed by: Self  
 Environmental Focus: Work

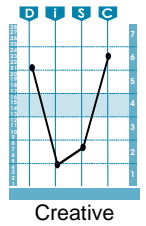
The above graph displays the relationship of the four behavioral tendencies in Sample's profile pattern. The information on the following pages is based upon this profile pattern.

Remember, the *DiSC PPSS* is not a test. There is no such thing as a "good" or "bad" pattern. Research indicates that the most successful people are those who know themselves and develop strategies to meet the needs of specific situations. The following information is most helpful when reviewed, discussed, and put to use in developing specific action plans for increasing personal effectiveness.



# Behavioral Overview

*The following narrative, based upon the profile responses, provides a general overview of Sample's natural behavioral style in the environment. This section is designed to provide a broad overview of his natural, most comfortable behavior. Sample's actual observed behavior may be somewhat different due to modifications based on the demands of the situation, the expectations of others, and his personal values. Review and discuss the information, deleting the portions that do not seem applicable and highlighting the portions which may be most relevant and useful.*



NOTE: The combination of behavioral tendencies that make up Sample's profile may appear to be contradictory due to the conflicting nature of the tendencies. Many people with this combination find that some of the information listed more accurately describes them than the rest of the information. Upon closer examination, they find the other information represents behavior that is potential but not used routinely.

Sample tends to be direct and forceful, innovative and imaginative, analytical and calculating. In fact, his behavior includes two opposing forces. His desire for tangible results may be balanced by his striving for perfection. His tendency to be aggressive may be balanced by his sensitivity. Quickness of thought and action may be balanced by a desire to explore all the options. Although he may not enjoy conflict, he tends to be able to act aggressively, if necessary for his success. He also may tend to expect and accept such aggressive behavior in others.

Actually, Sample may tend to be rather restrained in his expression when he initially meets someone. This may give the impression that he is mild-mannered and unlikely to be aggressive. His tendency to prefer to work alone and to deal with activities which limit his contact with people, may contribute to his appearance of being non-aggressive. Yet when the need for confrontation arises, Sample may take up the challenge. This may surprise those who have not previously seen that aspect of his behavior.

Sample may seek to be in a position of influence or control, preferably one that is officially endorsed. He may be much less interested in situations where status is conveyed by peers. He may prefer a position of power that brings with it unusual experiences. He may search for experiences that are challenging, rare, extraordinary, or at the very least, different.

This search for the unusual may lead naturally to an orientation to the future and all the new experiences which it offers. Sample may also tend to have a broad perspective - always looking at the "big picture." This combination may enable him to see the gaps and roadblocks that may be limiting results in a situation. He may take the initiative to make changes to fill in these gaps and remove the roadblocks. Since he also may have a drive for perfection and considerable planning ability, the changes he makes are likely to be sound. However, the method he uses to get results may be lacking in attention to interpersonal relationships.

Being primarily oriented toward tasks, Sample may not always be as concerned with people. In fact, he may occasionally cause co-workers to feel more like objects than people. He may not engage in any idle chatter or humor. If he feels that someone is somehow affecting progress, he may be quite blunt in saying so. He may not offer any friendly warning or include any element of humor or support in his message. He may be very specific in pointing out shortcomings so the people involved know precisely what they have done wrong and how to improve. Unfortunately, he may be less likely to acknowledge good performance or individual contributions.



## Behavioral Overview

If things are not going well or he is unable to achieve the control he desires, Sample may become easily bored with any kind of routine activities. He may also tend to sulk, becoming sullen and aloof, if he is not getting his share of the limelight. If he finds himself in this situation for some time, he may become quite aggressive, losing his natural degree of restraint. He may also increase his willingness to take risks and try untested ideas.

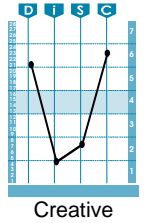
Sample may worry about not having enough influence - now and in the future. He may be concerned about changing technology, changing expectations for performance, or new requirements for promotion - anything that might possibly erode his current level of influence or prevent him from attaining future positions of influence and control.

When approaching a new problem or decision, Sample may prefer to try out possible solutions before selecting one. He may tend to analyze the information from many perspectives and then develop a plan for dealing with the situation. If time does not permit this approach, he may make a quick decision on matters of less importance or lower risk. However, he may have a tendency to waver and, thus, put off making a decision. On occasion, he may also have trouble continuing with a chosen course of action because he may continue to see new choices which might produce more desirable results.



# Motivating Factors

People have different sources of motivation and different goals based on their most preferred behavioral tendencies. This section lists those factors usually found to be most motivating to someone with Sample's behavioral tendencies. Some of these factors may not apply to Sample because he may have modified his behavior due to his life experiences and values system. Some of the factors may appear to be contradictory because of the differences in the tendencies that comprise Sample's behavior. Review and revise as necessary.



NOTE: The combination of behavioral tendencies that make up Sample's profile may appear to be contradictory due to the conflicting nature of the tendencies. Many people with this combination find that some of the information listed more accurately describes them than the rest of the information. Upon closer examination, they find the other information represents behavior that is potential but not used routinely.

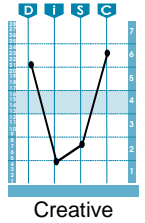
## Sample may be motivated by:

- Environments where he can perform to his own standards
- Control over those factors that affect the quality of his performance
- Environments where quality and accuracy are rewarded
- Being "right"
- Logical, systematic approaches
- Having control over his work environment
- Being able to direct other people's activities
- Being offered new opportunities and new challenges
- Situations where he is held accountable solely for results rather than for how the results are achieved
- Opportunities for advancement
- Rewards for achieving goals



# Preferred Environment

People have different preferences in the environment in which they most prefer to work or live. What one person finds delightful may be intolerable to someone else. This section provides information on what environment Sample might find most desirable based on his behavioral tendencies. Some of these factors may not apply to Sample or may appear contradictory because of the differences between the tendencies that describe Sample's behavior. Review and revise as necessary.



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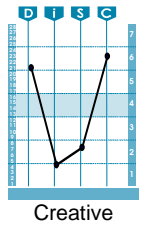
## Sample wants an environment which provides:

- A plan or system for performance which provides specific feedback
- A reserved, business-like atmosphere where people are task-oriented
- Time to complete tasks to his standards
- Maximum freedom to determine how things are done
- Fast-paced, results-oriented
- Performance measurements and rewards based upon achieving agreed-upon results
- Him the opportunity to control events



## Tends to Avoid

All people have different situations or activities that they naturally tend to avoid based on a dislike or fear of what is involved in the task or interaction. By knowing what our most likely avoidance behaviors are, we can choose strategies for coping with them and reduce possible negative outcomes such as procrastination. This section lists the activities and situations Sample is most likely to avoid based on his behavioral tendencies. Some of the factors may not apply to Sample. Review and revise as necessary.



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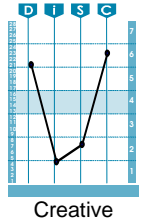
### Based on dislike, discomfort, or fear, Sample tends to avoid:

- Ambiguous situations in which his performance may be criticized
- Being held accountable for quality outcomes in situations where he has insufficient control
- Having to defend inferior performance in products or services
- Reacting quickly to situations requiring analysis
- Responding to others without time to evaluate possible consequences
- Emotionally charged situations where he may react and lose his reserved, detached manner
- Situations requiring personal disclosures
- Situations where he has no control over the environment
- Appearing soft or weak
- Situations requiring routine, predictable behaviors day after day
- Being closely managed by others
- Having to check in frequently and report what he is doing
- Having to report step by step how he is going to do a task or activity



# Strategies for Increased Effectiveness

*This section describes possible actions that Sample might take to modify certain naturally occurring behavioral tendencies to achieve greater effectiveness. Some of these strategies may be already in use, others may represent areas for potential skill development. It may be useful to prioritize the strategies based on the needs of the current environment. Review and revise as necessary.*



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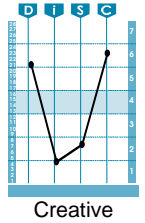
## Sample would increase his effectiveness by:

- Balancing adherence to high standards with attention to deadlines
- Responding non-defensively to comments about his performance
- Modifying criticism of others' work by considering feelings as well as facts
- Sharing knowledge and information with others in a non-condescending manner
- Practicing self-disclosure and appropriate expression of feelings
- Developing a willingness to negotiate performance standards
- Becoming more open to other people's systems for doing things
- Avoiding rigidity in his thinking and being "dead right"
- Taking more time to think through possible consequences before taking action
- Listening and considering the thoughts, feelings and experiences of others
- Learning to negotiate outcomes on a win/win basis
- Explaining his reasoning process rather than just announcing conclusions
- Learning to participate in a group without being in charge
- Developing tact and diplomacy in communications and interactions with others
- Giving recognition to others for their efforts



# Demotivating Factors

People have different factors that affect their motivation both positively and negatively. By understanding what these factors are, we can increase the amount of time we are experiencing those conditions that enhance our positive motivation and reduce the impact of those factors which will reduce self motivation. The following list can be used to create an environment more supportive to positive motivation by managing or eliminating demotivating factors specific to Sample's behavioral style.



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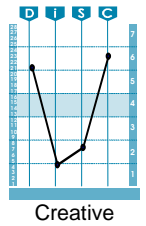
## Sample may become demotivated when:

- Rules or expectations constantly change particularly without explanation
- There is insufficient time to process information before having to act
- The work environment is informal and loosely structured
- Required to socialize as part of the job
- People intrude on his privacy
- His efforts at producing quality work are not valued
- He is repeatedly unable to perform at a level that meets his standards
- He has insufficient control over resources, time and other people's actions necessary to create a quality outcome
- His authority is countermanded
- His responsibility is diminished
- His resources are restricted
- Required to do routine activities with little or no variety
- Closely supervised
- Required to report frequently on activities rather than results
- He has no opportunity for advancement



# Behavior in Conflict Situations

Most people use behavior in conflict situations that can be described as either a "fight" or "flight" response based on their natural behavioral tendencies. Some people use a combination of both responses, depending on the intensity or degree of risk involved in the situation. The following describes a range of responses that Sample might use in a conflict situation. These behaviors may have been modified due to Sample's values system and/or life experience. This information will be more helpful if reviewed with Sample, ranking the behaviors from most-likely to be used to least-likely.



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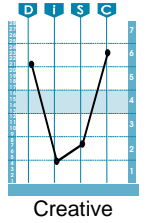
## In a conflict situation Sample:

- May initially withdraw from conflict to plan a strategy of response
- May become defensive
- May attempt to overpower others with facts and logic
- May use indirect aggression and/or passive resistance
- May appear to comply but fail to follow through
- May become rigid and unbending
- May withhold information
- May become aggressive
- Tends to take a direct, aggressive approach
- May escalate levels of aggression
- May create win/lose outcomes
- May overpower others who then retaliate with covert aggression
- Tends to become defensive
- May become autocratic, using rank and authority to end the conflict



# Behavioral Tendency Continuum

This continuum displays Sample's potential range of intensity for each of the behaviors listed. This continuum represents potential behavior based on Sample's profile pattern rather than actual, observed behavior. This information is most helpful when discussed and evaluated based on experience with Sample.



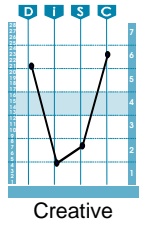
Name: **Sample Report**  
 Date: 1/19/2004  
 Classical Pattern: Creative  
 Environmental Focus: Work

	L	ML	M	MH	H
ACCEPTS - open, receives willingly	♦				
ADHERES - sticks to the rules			♦		
ADVOCATES - promotes, urges action				♦	
AGITATES - stirs up, rocks the boat				♦	
AMPLIFIES - explains, expands the point		♦			
ASSIGNS - delegates to others				♦	
ASSUMES - takes for granted			♦		
BOASTS - brags about abilities		♦			
CAPTIVATES - charms others		♦			
COMMANDS - directs others				♦	
DIGESTS - absorbs, thinks it through				♦	
ESTABLISHES - stabilizes, builds to last			♦		
IMITATES - follows the leader's example	♦				
INVENTS - creates new solutions, ideas					♦
INVESTIGATES - examines, checks it out				♦	
JUSTIFIES - defends, gives reasons for				♦	



# Behavioral Tendency Continuum

This continuum displays Sample's potential range of intensity for each of the behaviors listed. This continuum represents potential behavior based on Sample's profile pattern rather than actual, observed behavior. This information is most helpful when discussed and evaluated based on experience with Sample.



Name: **Sample Report**  
 Date: 1/19/2004  
 Classical Pattern: Creative  
 Environmental Focus: Work

	L	ML	M	MH	H
MAINTAINS - continues, preserves		♦			
MANEUVERS - plans skillfully					♦
MODIFIES - adapts, adjusts, revises		♦			
NURTURES - shows care for others	♦				
OBJECTS - protests, argues, disputes				♦	
OBSERVES - watches attentively				♦	
PLANS - prepares, maps out task				♦	
PRAISES - compliments, shows approval		♦			
PROHIBITS - cautions, prevents risk				♦	
PROTECTS - guards tradition, stability			♦		
RECONCILES - appeases, settles differences			♦		
REVIEWS - examines in detail				♦	
SPECULATES - gambles on the future					♦
TESTS - examines, tries it out				♦	
TRUSTS - believes in others		♦			
VERBALIZES - talks things out		♦			

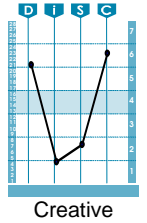






# Strategies for Creating a Positive Relationship

*All people are not the same. A strategy that works very effectively with one person may be disastrous with another. Trial and error learning about which strategies are effective with which person can be very costly in both time and emotion. This section provides a starting point for developing strategies based on Sample's natural behavioral tendencies. By reviewing and discussing the strategies listed for each key behavioral area, you can develop an effective plan for creating a positive relationship with Sample.*



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## **Creating a Positive Climate for Sample**

- Create opportunities for him to demonstrate his expertise
- Validate his efforts at achieving results that meet his standards
- Provide situations where his logical and systematic efforts will contribute to long-term success
- Accept that he may be reluctant to express his feelings
- Provide him opportunities for private time
- Accept that he may be quiet and observant in social situations
- Provide opportunities for him to talk knowledgeably with others about a specific subject
- Accept his need to be "right" and his distress at mistakes, especially his own
- Provide choices for activities, letting him make the decision
- Allow him to direct the efforts of others
- Accept his need to compete and win
- Give your undivided attention to his interests
- Direct more attention to getting results than discussing emotions
- Accept his need for variety and change
- Let him set the pace for activities



# Strategies for Creating a Positive Relationship

## **How to Communicate with Sample**

- Sample tends to prefer communication to be somewhat formal in new situations, avoiding personal references and discussions
- He tends to be matter-of-fact, preferring a logical presentation of information rather than emotional expressions
- He may have difficulty storing information that conflicts with his perception of how things should be
- Check for points of disagreement or misunderstanding
- He may aggressively question the information presented in an effort to reconcile conflicting sources of information
- Respond to the questions with specific information in a nondefensive manner
- Sample tends to prefer to have time to process new information before responding
- Sample tends to prefer direct, to the point communications without a lot of time spent on social chatter
- Be prepared to Listen to his ideas before moving on to other topics
- Tends to practice selective perception, only hearing and/or remembering that with which he agrees
- Consider checking at end of discussion to make sure everything was heard, and stored in memory, by asking him to repeat what he heard

## **How to Compliment Sample**

- Use concise, accurate, specific statements, preferably in private
- Compliment his competence in a specific skill area
- Praise his continued commitment to meeting high standards
- Compliment his tactful, discrete or subtle approach to difficult situations
- Acknowledge his ability to remain calm and detached in emotionally charged situations
- Recognize the value of his insightful thinking in complex situations
- Validate his use of logic in handling problems



# Strategies for Creating a Positive Relationship

## **How to Compliment Sample (Continued)**

- Use brief, direct factual statements
- Focus on his achievements, and his demonstrated leadership abilities
- Acknowledge his ability to take charge of a difficult situation
- Compliment his ability to take risks, to set precedents
- Recognize the unique or innovative nature of his thoughts, ideas and/or actions
- Acknowledge his ability to get the maximum results with the minimum investment of time and effort

## **How to Provide Feedback to Sample**

- Take time to reduce his potential defensiveness by acknowledging his areas of competence
- List specific behaviors and the consequences of those behaviors
- Keep the discussion factual, accurate, logical, and impersonal
- Specify needed change, explaining why the change is necessary
- Solicit his thoughts about the solution
- Provide him an opportunity to think about the situation before responding
- Let him develop a strategy for change before committing to a specific course of action
- Disengage from right/wrong discussions
- Get a clear commitment from him for specific actions within a defined time frame, with a date for a follow-up discussion
- Focus discussion on obstacles to achieving results and how he can eliminate them
- Discuss desired changes in his behavior in terms of potential impact on results
- Describe current negative consequences from his behavior and request solutions
- Keep feedback factual, neutral and nonjudgemental
- Reduce his defensiveness by focusing solely on actions and consequences
- Disengage from right/wrong debates
- Keep discussion focused on actions, rather than motives or intentions



# Strategies for Creating a Positive Relationship

## How to deal with Sample in Conflict

- Sample initially may withdraw from open conflict, but he can become aggressive
- State the issue calmly, logically, factually, citing specific behavior or situations
- Reduce his defensiveness by acknowledging his thoughts, without reacting defensively, by saying "I can see your point"
- Listen to his thoughts, then re-direct the discussion to the current issue
- Minimize time spent discussing all the factors contributing to the issue in the past by focusing on what is going to be done right now to resolve the conflict
- Counter statements of blame or attack by acknowledging that you heard what he said, and, without discussing it, move back to the issue under discussion
- Counter critical statements about your behavior by acknowledging that your behavior may have been less than perfect, without becoming defensive
- Ask what he needs to resolve this conflict on a win/win basis
- Acknowledge his need to take some time to think about the situation before he can respond
- Affirm that your intent is to resolve the conflict, not to criticize or attack him personally
- Counter his tendency to use passive resistance as a form of indirect aggression by asking him to state specifically what he intends to do and when
- Establish clearly what you both understand to be the next step in this situation
- Affirm that you value his thoughtful, insightful approach to the situation and his desire to resolve the issue on a reasonable, equitable basis
- Respond to his need to think about the situation and to process the issues by scheduling a time in the near future where you would be willing to review the situation more formally, with more depth, allowing him time to prepare his thoughts
- Sample may tend to take a direct, aggressive approach, resulting in an "I win, you lose" outcome
- Acknowledge his logic or reasoning by saying "I can see your point" or "I can see the logic in your thinking"
- After acknowledging his thinking, calmly restate your point
- Disengage from right/wrong debates by acknowledging the differences between the two of you, without judgement



# Strategies for Creating a Positive Relationship

## **How to deal with Sample in Conflict (Continued)**

- Accept that the only workable, win/win solution may be to agree to disagree
- Counter blaming statements by refocusing on the issue and what corrective action is going to be taken
- Resist any impulse to retaliate with blaming, attacking or sarcastic comments
- Reduce your defensiveness when attacked and acknowledge any error on your part
- Use open-ended questions (how, what, where, when, who) to define the real issues in the situation
- Ask him what it is that he really wants as an outcome
- Call a time-out if emotions escalate to high levels of aggression or hostility, scheduling a time to continue the discussion
- Conclude the discussion with a summary of what each person has committed to do to resolve the conflict

## **How to deal with Sample's Problem-solving Style**

- Sample tends to prefer an analytical, systematic approach to solving problems, considering all contributing factors and possible consequences
- He may need to be coached on alternate problem-solving techniques for problems that need more immediate solutions
- He tends to want to find a perfect solution
- He may need help in developing a workable solution rather than a perfect solution
- Sample tends to take a practical, results-oriented approach, preferring simple, easy-to-implement, immediate solutions
- He may need to be directed toward considering the long term consequences of the decision
- He may need coaching in handling complex problems due to his natural tendency to over-simplify in a rush for immediate results



# Strategies for Creating a Positive Relationship

## **How to Deal with Sample's Decision-making Style**

- Sample tends to approach decision-making in an analytical manner, calculating risks and potential payoffs
- He may want more time to gather information
- Discuss what are appropriate amounts of time to spend in analysis
- Assist in setting a time limit for a decision
- Sample can get bogged down in "what-if" concerns
- He may need reassurances on what the personal consequences of being wrong will be
- Sample tends to be a quick decision-maker
- He may need to be encouraged to take enough time to gather sufficient information and consider possible consequences before making decisions
- Point out the benefits of taking more time in terms of improved results

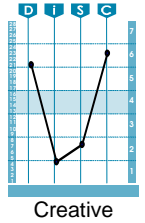






# Relating to People and Environment

*This section describes how Sample may tend to relate to other people and his environment based on his natural behavioral tendencies. Some of these behaviors may have been modified or eliminated by Sample due to his life experiences and his values system. Therefore, some items may represent only potential behaviors. Additionally, some of the behaviors may appear to be conflicting because of the range of responses possible for Sample, given the nature of his behavioral style. Review, discuss, and revise the list as appropriate.*



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## How Sample Tends to Communicate

- Tends to be reserved, precise and detached when communicating with people he does not know well
- Tends to use logic and data to persuade others rather than using emotional appeals
- Tends to use formal, written communication, documenting discussions in situations where there has been misunderstanding or conflict
- Prefers a reserved, impersonal, business-like approach in communications when dealing with people other than close co-workers
- May be perceived by others as cold, detached and uninvolved due to his lack of verbal or non-verbal expression
- Tends to be uncomfortable with other people's emotional displays, preferring to remain detached and restrained in expression
- May be more comfortable expressing negative emotions (such as anger, displeasure, disappointment, criticism) rather than positive emotions
- Tends to be uncomfortable verbally expressing positive emotions, such as joy, affection, happiness
- May prefer to write a note or letter to more completely express his sentiments
- Tends to be slow to trust, or to reveal personal information until the other person has proven their worthiness
- Prefers to have one or two close, long-term friends as confidants
- Can be quite verbal and expressive with close friends
- Tends to be sarcastic in his expressions, using a sometimes scathingly dry wit
- May enjoy engaging in verbal repartee in situations where he is comfortable



# Relating to People and Environment

## **How Sample Tends to Communicate (Continued)**

- Tends to be direct, factual, bottom-line oriented
- Tends to avoid wasting time on small talk or social amenities
- Tends to tell others what to do, without being asked to do so
- May be so direct and forceful in communicating that others have difficulty asking questions, clarifying understanding, or pointing out problems
- May be perceived by others as blunt, cold, or uncaring because of his brief communication style
- May have difficulty expressing positive emotions, even though he feels them
- Tends to assume that others know how he feels, especially if he told them once in the past
- May be more comfortable in expressing his feelings through actions, assuming that others can decode the message
- Tends to be comfortable in expressing anger, sometimes using anger when sadness, hurt or fear would be a more accurate expression of his true feelings
- Tends to be impatient, have difficulty listening to long narratives, preferring people to "get to the point"
- Tends to be a selective listener, hearing and storing information as it fits his perception
- Tends to be uncomfortable with other people's emotional displays, wanting to "fix" the situation or deal with it more "rationally"
- May tend to undervalue the importance of frequent, quality communication in maintaining work relationships

## **How Sample Tends to Make Decisions**

- Tends to be a careful decision-maker, gathering information and assessing possible risk before making decisions
- May want to defer risky decisions to others or at least get an expert opinion
- May get stuck in information-gathering and analysis due to his fear of making the wrong decision
- May get paralyzed by "what if" scenarios
- May experience high levels of regret and self-criticism over past decisions
- Tends to review past experiences to find a more perfect, fail-proof process for making decisions



# Relating to People and Environment

## **How Sample Tends to Make Decisions (Continued)**

- Tends to be quick, decisive, independent and firm
- Tends to be bottom-line oriented, assessing the short-term impact
- May tend to take higher risks than are comfortable for others, believing that the potential for big payoffs justify the risk
- May fail to consider long-term consequences and fail to think through all the factors in complex situations

## **How Sample Tends to Manage Time**

- Follows a systematic approach, taking pride in finding unique, efficient techniques that produce high quality results
- May be critical of others who do not use a systematic approach
- Tends to have high standards and may spend more time gathering information and perfecting results than is justified
- May have difficulty managing time because of his perfectionism
- May have difficulty delegating to others because no one else can meet his standards
- May need to develop new standards for his performance that are more appropriate to current conditions and the demands on his time
- Tends to operate with a sense of urgency, taking short-cuts wherever possible
- Tends to take pride in efficient solutions that allow him to pack a lot into a day
- May underestimate time involved in some activities, resulting in cutting things short, potentially missing deadlines
- May be critical of others who do not share his sense of urgency or move at the same fast pace
- Tends to be impatient with others who desire a more leisurely pace



# Relating to People and Environment

## **How Sample Tends to Solve Problems**

- Tends to use an analytical approach to solving problems, considering many variables in developing the solution
- May be very effective in solving complex problems but may spend too much time analyzing simple problems
- Tends to use information systems to anticipate problems
- Tends to want the perfect solution and may lose sight of other realities such as deadlines
- Tends to prefer simple, practical, easy-to-implement solutions
- May have difficulty involving others in the problem-solving process because of his impatience and desire for immediate solutions

## **How Sample Tends to Handle Stress**

- Experiences moderate to high levels of stress as a result of trying to meet his own standards
- Tends to be driven to achieve perfection, resulting in a chronic state of frustration with himself and others
- Tends to be worried about adequately preparing for the future, spending time thinking through contingency plans
- Tends to perceive the world as a somewhat hostile environment, requiring vigilance on his part to ensure that things go "right"
- Needs private time to relax and process his thoughts and feelings about the events in his life
- May become hostile and critical when overloaded, being driven by an inner inability to rest until everything is done "right"
- May have difficulty shutting down his internal critic in order to get some rest



## Relating to People and Environment

### **How Sample Tends to Handle Stress (Continued)**

- Tends to seek out demanding, challenging, fast-paced environments and may not notice the negative impact on his health or relationships
- Tends to perceive the environment as being somewhat antagonistic, requiring an aggressive or defensive stance on his part
- May be so strongly driven to achieve results that he fails to set realistic limits for himself
- May need to work on letting go of the need to control his environment and other peoples' actions in order to reduce his stress
- May have difficulty taking adequate time to recover from illness or injury due to a self-imposed sense of urgency
- May choose a high level of variety and change, finding predictable routines more stressful than change

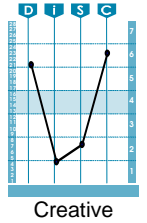






# Strategies for Managing Sample

*All people are not the same. A management strategy that is very effective with one person may be disastrous with another. Trial and error learning about which strategies are effective with which person can be very time-consuming and expensive both in the dollar cost as well as the emotional cost. This section provides a starting point for developing strategies based on Sample's natural behavioral tendencies. By reviewing and discussing the strategies listed for each key management activity, you can develop an accurate, effective plan for managing Sample.*



NOTE: The combination of behavioral tendencies that make up Sample's profile may appear to be contradictory due to the conflicting nature of the tendencies. Many people with this combination find that some of the information listed more accurately describes them than the rest of the information. Upon closer examination, they find the other information represents behavior that is potential but not used routinely.

## Developing

- Demonstrate in a logical manner, explaining the rationale for each procedure
- Check for understanding at key points
- Provide time to process the information and practice skill on his own
- Be available to respond to questions and to provide additional explanations
- Define time limits for developing adequate skill, rather than perfect mastery
- Make him productive quickly
- Show him the simplest, quickest, most practical way to get results
- Emphasize the key details necessary to get results
- Define clearly the limits of his authority

## Motivating

- Create opportunities for him to demonstrate his expertise
- Support his efforts at creating quality results
- Provide situations where logical and systematic efforts will contribute to long-term success
- Provide opportunities to work independently
- Allow him to direct the efforts of others
- Offer options for achieving goals
- Provide challenges, opportunities to "win"



# Strategies for Managing Sample

## **Complimenting**

- Use concise, accurate, specific statements (preferably in private) about his competence, use of logic, efficiency, and precision
- Use brief, direct statements, focusing on achievements, results, and leadership abilities

## **Counseling**

- Take time to reduce potential defensiveness by acknowledging areas of competence
- Specify needed change, explaining why the change is necessary and solicit his thoughts about the solution
- Provide him with the opportunity to think about the situation and develop a strategy before committing to a specific course of action
- Focus on obstacles to achieving results and how to eliminate them
- Present needed changes in terms of impact on results and consequences
- Request solutions from him

## **Problem-Solving**

- Tends to prefer an analytical, systematic approach to solving problems, considering all contributing factors and possible consequences
- May need to be coached on alternate problem-solving techniques for problems that need more immediate solutions
- Tends to want to find a perfect solution
- May need help in developing a functional solution, rather than a perfect solution
- Tends to take a practical, results-oriented approach, preferring simple, easy-to-implement, immediate solutions
- May need to be directed toward considering the long-term consequences
- May need coaching in handling complex problems due to a natural tendency to over-simplify in a rush for immediate results



# Strategies for Managing Sample

## **Delegating**

- Provide logical, accurate, precise descriptions of performance expectations, including standards for quality
- Explain why the assignment is being done and how it is necessary to the overall operation
- Provide opportunities to discuss alternate ways of completing the assignment, determining what resources are available
- Tell him what result you need and by when; let him determine how to get it done
- Specify clearly the limits of authority and available resources, allowing autonomy within those limits

## **Correcting**

- Tends to become defensive when his performance is criticized
- Stick to a specific, factual discussion of what the current results are and what performance is necessary
- Allow time for him to create and report a plan for improving his performance
- Close discussion by clarifying and getting agreement on what the improvement will be and by when
- Set a date for formally reviewing progress
- Be firm and direct, specifying the desired result as well as current level of performance
- Direct the discussion to what he is going to do to eliminate the gap in performance
- Define time limits for improvements and state consequences clearly

## **Decision-Making**

- Tends to approach decision-making in an analytical manner, calculating risks and potential payoffs
- May want time to gather information
- Discuss appropriate amount of time to spend in analysis; set time for decision
- Can get bogged down in "what-if" concerns
- May need reassurances of what the personal consequences of being wrong will be



# Strategies for Managing Sample

## **Decision-Making (Continued)**

- Tends to be a quick decision-maker
- May need coaching on taking time to gather sufficient information and considering possible consequences before making decisions
- Point out benefits in taking more time in terms of improved results

## **Communicating**

- Tends to prefer communication to be formal and business-like, avoiding personal references and discussions
- State purpose for the communication up front, covering the topics in a logical, systematic manner
- May have difficulty storing information that conflicts with his perception of how things should be
- Check for points of disagreement or misunderstanding
- May aggressively question the information
- Respond to the questions with specific information in a non-defensive manner
- Tends to prefer to have time to process the information before responding
- Set time to meet and finalize the discussion
- Prefers direct, to the point, communications without a lot of time spent on social chatter
- Be prepared to listen to his ideas before moving on to other topics
- State areas of shared agreement before moving into other areas of less agreement
- Tends to practice selective perception, only hearing and/or remembering that with which he agrees
- Check at end of discussion to make sure everything was heard and stored in memory by asking him to summarize and restate

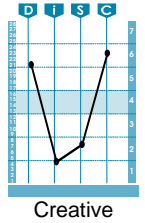






# How Sample Tends to Manage

*This section describes how Sample may tend to manage based on his natural behavioral tendencies. Some of these key management behaviors may have been modified due to life experience and Sample's values system and, therefore, represent only potential behaviors. Some of the behaviors may appear contradictory as they represent the different behavioral tendencies that comprise Sample's style. Review and discuss the list, determining which behaviors are most effective in this management environment.*



NOTE: The combination of behavioral tendencies that make up Sample's profile may appear to be contradictory due to the conflicting nature of the tendencies. Many people with this combination find that some of the information listed more accurately describes them than the rest of the information. Upon closer examination, they find the other information represents behavior that is potential but not used routinely.

## **Communicating**

- Tends to be systematic in his communications, using logic and data to persuade
- Tends to use formal, written communication, documenting discussions
- Prefers a reserved, impersonal, business-like approach in oral communications
- Tends to avoid discussion of personal information or socializing in the work environment
- May be perceived by others as cold, detached, and uninvolved
- Tends to be direct, factual, bottom-line oriented
- Tends to avoid wasting time on small talk or social amenities
- May be perceived as blunt, cold, or uncaring

## **Delegating**

- Tends to give specific, detailed instructions for assignments
- May do important work himself so that he can be sure that it will be done correctly
- May have difficulty finding people who meet his standards
- Tends to monitor progress and results closely so that others may feel under inspection constantly
- Prefers working with people who share high standards and commitment to quality performance
- Tends to delegate to others the responsibility for follow-through on details
- May be so non-specific and results-oriented in assigning tasks that others have difficulty finding out how to do it
- May have difficulty delegating authority to go with the responsibility because he wants to maintain control



# How Sample Tends to Manage

## **Directing People**

- Tends to be impersonal, precise, and factual in directing people, by focusing on what needs to be done how, why, by whom, and when
- May prefer to give assignments in written, formal communications, requesting specific feedback in response
- Tends to control the work produced in the environment, checking on quality by frequently questioning people
- May have difficulty with people who resist close supervision
- Tends to tell people what to do in a forceful, direct manner
- Likes to control the results
- May be so direct and forceful that people have difficulty asking questions, clarifying understanding, and pointing out potential problems

## **Developing People**

- Tends to prefer a systematic, comprehensive approach to training, with competency requirements specified and assessed
- Sets high standards for performance and may become critical, impatient, and demanding
- Tends to provide resources for on-going training and skill development
- Tends to put people to work right away believing that "hands-on" involvement on the job is the best way to learn
- Prefers self-initiating, self-directed learners and tends to be impatient with having to provide instruction
- Values practical experience highly

## **Decision-Making**

- Tends to be a careful decision-maker, gathering information and assessing possible risks before making decisions
- May want to defer risky decisions to higher levels of authority or at least get approval



# How Sample Tends to Manage

## **Decision-Making (Continued)**

- Tends to be quick, decisive, independent, and firm
- Tends to be bottom-line oriented, assessing the short-term impact
- May fail to consider long-term consequences and fail to include all factors in complex situations

## **Managing Time**

- Follows a systematic approach, taking pride in finding unique, efficient techniques that produce high quality results
- May be critical of others who do not use a systematic approach
- Tends to have high standards and may spend more time gathering information and perfecting results than is justified
- Tends to operate with a sense of urgency, taking short-cuts wherever possible
- Tends to take pride in efficient solutions that allow him to pack a lot into a day
- May underestimate time involved in some activities, resulting in cutting things short, potentially missing deadlines
- May be critical of others who do not share his sense of urgency or work at the same fast pace

## **Problem-Solving**

- Tends to use an analytical approach to solving problems, considering many variables in developing the solution
- May be very effective in solving complex problems but may spend too much time analyzing simple problems
- Tends to use information systems to anticipate problems
- Tends to want the perfect solution and may lose sight of other realities such as deadlines
- Tends to prefer simple, practical, easy-to-implement solutions
- May have difficulty involving others in the problem-solving process because of his impatience and desire for immediate solutions



# How Sample Tends to Manage

## **Motivating Others**

- Provides specific information on what is expected and specific feedback on performance, stating the logical benefits of working for this organization
- States factually why the person is of value to the organization
- Tends to create competitive challenges
- Sets short-term goals and recognizes achievement of results

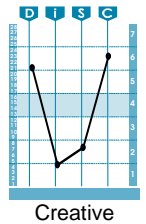






# Managing Sample in a Sales Environment

*All people are not the same. A management strategy that is very effective with one person may be disastrous with another. Trial and error learning about which strategies are effective with which person can be very costly both in lost time and lost sales. This section provides a starting point for developing sales management strategies based on Sample's natural behavioral tendencies. By reviewing and discussing the strategies listed for each key management activity, you can develop an accurate, effective plan for managing Sample in his specific sales environment.*



NOTE: The combination of behavioral tendencies that make up Sample's profile may appear to be contradictory due to the conflicting nature of the tendencies. Many people with this combination find that some of the information listed more accurately describes them than the rest of the information. Upon closer examination, they find the other information represents behavior that is potential but not used routinely.

## Developing

- Demonstrate the behaviors desired in a logical manner, explaining the rationale for each procedure
- Check for his understanding at key points by asking him to describe his understanding of what is required
- Provide him the time to process the information and practice the necessary skills on his own
- Be available to respond to questions and to provide additional explanations
- Define time limits for him to develop adequate skill rather than perfect mastery
- Help him become productive as quickly as possible
- Show him the simplest, quickest, most practical way to get results and meet his sales goals
- Emphasize primarily the key details which will be necessary to get sales results
- Define clearly the limits of his authority and the resources available to him for achieving sales results

## Motivating

- Create opportunities for him to demonstrate his expertise in product knowledge or selling techniques
- Recognize his efforts in creating high quality results for his customers
- Provide situations where his logical and systematic efforts will contribute to the long-term success of the organization
- Solicit his thoughts and ideas about what can be done to improve sales and service quality



# Managing Sample in a Sales Environment

## **Motivating (Continued)**

- Provide opportunities for him to work independently
- Allow him to direct the efforts of others for achieving significant results
- Offer him flexible options for achieving results
- Provide him challenges and opportunities to "win"

## **Giving Recognition**

- Use concise, accurate, specific statements (preferably in private) about his competence
- Acknowledge how his use of logic, efficiency and attention to quality have contributed to success with his customers
- Compliment his tactful, discrete or subtle approach to handling difficult situations with customers
- Recognize his ability to remain calm and detached in emotionally charged situations
- Use brief, direct statements focusing on his achievements, results and demonstrated ability to be a leader in his field
- Acknowledge his ability to handle difficult customer situations successfully
- Recognize the unique or innovative nature of his thoughts, ideas and/or actions

## **Coaching/Counseling**

- Take time to reduce his potential defensiveness by acknowledging areas of his competence in selling, handling customers or product knowledge
- Specify the needed change, explaining why the change is necessary
- Clarify the expectations for performance, establishing a specific, agreed upon, measurable, standard for sales results
- Keep the discussion factual, logical, accurate, and impersonal
- Provide him an opportunity to think about the situation before he has to respond with a plan of action
- Get a clear commitment from him for specific actions within a defined time frame
- Set a date for formally reviewing his progress in improving his performance



# Managing Sample in a Sales Environment

## **Coaching/Counseling (Continued)**

- Focus discussion on obstacles to achieving sales results and how he can eliminate them
- Discuss desired changes in his behavior in terms of potential positive impact on sales results
- Reduce his defensiveness by requesting solutions from him
- Be firm and direct, specifying the desired result as well as describing the current level of sales performance
- Direct the discussion to what he is going to do to eliminate the gap in performance
- Define the time limits for improvements and state the consequences clearly

## **Communicating**

- Tends to prefer communication which is formal and business-like, avoiding personal references and discussions
- State purpose for the communication up front, covering the topics in a logical, systematic manner
- May have difficulty storing information that conflicts with his perception of how things should be
- Check for points of disagreement or misunderstanding by asking for specific feedback from him
- May aggressively question the information when it conflicts with other information that he has about the situation
- Respond to his questions with specific information in a nondefensive manner
- Tends to prefer to have time to process the information before responding
- Set time for him to check back with any questions or concerns he may have
- Prefers direct, to-the-point communications without a lot of time spent on social chatter
- Be prepared to listen to his ideas before moving on to other topics
- Tends to practice selective perception and/or hearing, remembering only that with which he agrees
- Check at end of discussion to make sure everything was heard and stored in memory by asking him to summarize and restate



# Managing Sample in a Sales Environment

## **Problem-Solving**

- Tends to prefer an analytical, systematic approach to solving problems, considering all contributing factors and possible consequences
- May need to be coached on alternate problem-solving techniques for problems that need more immediate solutions
- Tends to want to find a perfect solution
- May need help in developing a workable solution rather than a perfect solution
- Tends to take a practical, results-oriented approach, preferring simple, easy-to-implement, immediate solutions
- May need to be directed toward considering the long term, negative consequences of some solutions
- May need coaching in handling complex problems due to his natural tendency to over-simplify in a rush for short-term results
- May need to consider that his haste for immediate results may have a negative impact on the overall sales effort

## **Delegating**

- Provide a logical, accurate, precise description of sales performance expectations, including standards for quality in sales and service
- Explain why the assignment is being done and how it is necessary to the overall operation
- Provide opportunity to discuss alternate ways of completing the assignment, determining what resources are available
- Tell him what result you need and by when: Let him determine how to get it done
- Specify clearly the limits of his authority and the resources available to him allowing autonomy within those limits



# Managing Sample in a Sales Environment

## **Decision-Making**

- Tends to approach decision-making in an analytical manner, calculating risks and potential payoffs
- May want time to gather more information
- Discuss appropriate amounts of time to spend in analysis; set time for decision
- Can get bogged down in "what-if" concerns
- May need reassurances on what the personal consequences of being wrong will be
- Tends to be a quick decision-maker
- May need coaching on taking time to gather sufficient information and considering possible consequences before making decisions
- Point out benefits to him in taking more time in terms of improved sales results

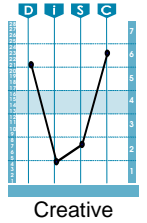






# Sample's Natural Approach to the Selling Process

*This section describes how Sample would tend to approach the various stages of the selling process based on his natural style. By understanding Sample's natural approach to sales, it can be determined which of his natural behaviors are most effective in certain selling situations with specific customer styles. It can also be determined where additional training or coaching may be helpful in increasing Sample's effectiveness in selling situations where his natural style may not be as effective. As some of these behaviors may already have been modified, review and revise this section as necessary.*



NOTE: The combination of behavioral tendencies that make up Sample's profile may appear to be contradictory due to the conflicting nature of the tendencies. Many people with this combination find that some of the information listed more accurately describes them than the rest of the information. Upon closer examination, they find the other information represents behavior that is potential but not used routinely.

## Planning

- Tends to plan strategically, assessing many possible scenarios, developing contingency plans for each possible outcome
- Prefers to gather information in advance, preparing support materials for all possible requests
- May have difficulty planning for situations where there is insufficient information about the customer, or where he feels inadequately prepared in product knowledge
- His natural approach to planning works most effectively with customers who make buying decisions based on logic and well-documented information on product performance
- His natural style may need modification to be effective with customers who tend to make buying decisions based on a "gut-feel" or interpersonal interactions, or in sales situations that change rapidly, requiring quick responses without time for planning
- Tends to prefer to spend more time getting results than in planning
- Tends to focus on the big picture, letting the details take care of themselves
- Tends to focus on the goal or bottom-line result and may not prepare a step-by-step plan for achieving the goal
- May oversimplify complex situations or underestimate the potential obstacles and be surprised by buyer resistance
- His natural approach to planning may be most effective with customers who are impatient, results-oriented, and more interested in "what" than "how"
- His natural style may need modification to prepare for customers who need a more methodical, step-by-step explanation, with more detailed information provided



# Sample's Natural Approach to the Selling Process

## **Opening the Call**

- Tends to use a reserved, business-like approach to opening the call
- Tends to prefer minimal socializing, approaching the purpose of the call with a subtle yet direct style
- His natural approach to opening the call tends to be most effective with customers who are reserved and prefer a factual approach with minimal time spent on social interaction
- His natural style may require modification to be effective with customers who prefer an enthusiastic or interactive approach
- Tends to be direct and results-oriented, getting immediately to the point of the call
- Tends to avoid social chatter, considering it a waste of time, and moves right to business
- His natural approach to opening the call tends to be most effective with customers who are impatient and results-oriented
- His natural style may require modification to be effective with customers who prefer to spend more time interacting and building a relationship before moving to business

## **Interviewing**

- Tends to use a reserved, low-key, logical approach to interviewing
- Tends to probe subtly for underlying motivations to determine "why" the customer does things
- His natural approach to interviewing is most effective with customers who prefer a more indirect, factual approach
- His natural style may require modification to be more effective with customers who prefer a more enthusiastic approach with more personal involvement
- Tends to interview in a direct, aggressive manner, identifying the customer's goals quickly
- Tends to ask "what" questions, focusing on desired results
- His natural approach to interviewing works most effectively with customers who prefer directness; however, the customer may want more control over the interviewing process
- His natural style may require modification with customers who prefer a slower, more indirect approach, or with customers who become defensive in response to his aggressive approach\



# Sample's Natural Approach to the Selling Process

## **Presenting**

- Tends to present in a reserved, analytical manner focusing on product quality
- May provide more information than the customer desires in an attempt to be complete and accurate in his presentation
- His natural approach to presenting tends to be most effective with customers who prefer a presentation which provides them with information they can assess to determine the performance of the product or service
- His natural style may require some modification to be effective with customers who tend to make decisions based on a "gut-feel" rather than on analysis of product information, or with customers who desire a brief presentation, focusing only on bottom-line results
- Tends to be concise, focusing on results
- May tend to announce conclusions, rather than explaining his reasoning process
- His natural approach to presenting works most effectively with customers who are interested primarily in results, requiring little or no details in the presentation
- His natural style may need modification to be effective with customers who require a more methodical approach and a more detailed explanation

## **Responding to Concerns**

- Tends to respond to concerns by gathering more information from the customer, probing to find the real, unstated concern
- Tends to respond with a systematic explanation logically addresses, how the concern will be resolved
- His natural approach for responding to customer concerns is most effective with customers who want responses that make sense and address the real issues
- His natural style may need modification to be effective with customers who prefer a more personal, supportive or optimistic response



# Sample's Natural Approach to the Selling Process

## **Responding to Concerns (Continued)**

- Tends to respond to concerns directly
- Tends to focus on the goal or the result to be achieved, rather than on the concern
- May not listen fully to the concern, or minimize its importance to the customer
- His natural approach for responding to concerns tends to be most effective with customers who share a similar blunt, direct approach to concerns
- His natural style may need to be modified to be effective with customers who either require more emotional reassurance or a detailed explanation in response to their concern

## **Gaining Commitment**

- Tends to move toward gaining commitment systematically, subtly leading the customer to the logical conclusion that it would make sense to buy his product or service
- May tend to expect that after presenting all the benefits of the product or service, the customer would logically make the decision to buy
- May experience frustration with the customer's indecision after he has presented all the obvious reasons to buy
- His natural approach to gaining commitment tends to be most effective with customers who make decisions based on logical analysis of product benefits
- His natural style may require modification to be effective with customers who are indecisive or who want emotional reassurance rather than logic
- Tends to move quickly and directly to gaining a commitment from a customer
- May aggressively pursue a commitment, considering "No" a temporary obstacle
- His natural approach to gaining commitment tends to be most effective with customers who are results-oriented and make quick decisions, as long as the customer does not become defensive as a result of experiencing loss of control of the buying decision
- His natural style may require modification to be effective with customers who prefer to take time to gather and review information and who resist making a decision before they have had time to analyze



# Sample's Natural Approach to the Selling Process

## Servicing

- Tends to use a formal follow-up procedure to ensure the quality of product or service performance
- Tends to use a reserved, analytical approach, focusing more on product performance or quality issues than on building the customer relationship through social interaction
- His natural approach to servicing tends to be most effective with customers who are primarily interested in a systematic follow-up to ensure consistent product performance
- His natural style may require modification to be effective with customers who prefer customer support through personal involvement or enthusiastic socializing
- Tends to follow-up by efficiently checking on results
- May tend to be more interested in getting new sales than servicing existing customers
- His natural approach to servicing tends to be most effective with customers requiring minimal follow-up, as long as they are getting results
- His natural style may require modification with customers who prefer routine contact and follow-up



