

Leadership



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

Sam Sample

Organization:

FinxS

Date:

12.04.2019





Introduction to Your Leadership Assessment

A leader who is self-aware enough to know that he or she is not adept at everything is one who has taken the first step toward being a great leader.

–Marshall Goldsmith

Sam, your success as a leader is determined in a very large part by how well you interact with your employees and other people. Your ability to effectively relate, communicate, influence and motivate others is a crucial skill in succeeding as a leader and creating successful, long-term relationships with subordinates, peers, customers, prospects, colleagues, friends and family members.

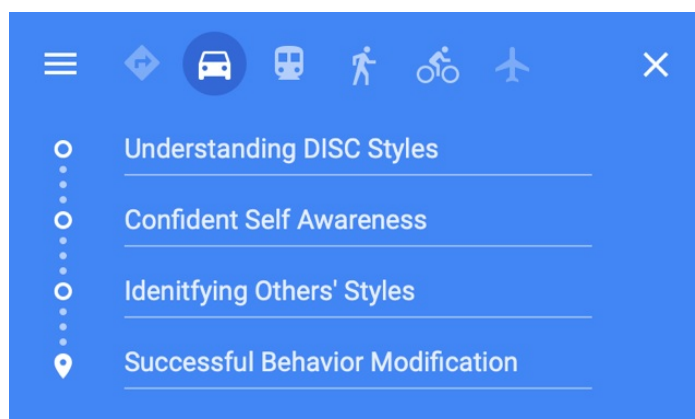
As a leader, you need to be able to interact with various people at different levels. You've probably noticed it is very easy to get along with certain people. You almost instantly and effortlessly understand the other person. The communication just flows. It is a lot more than just mutual understanding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

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

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

Sam, this Leadership Assessment will provide you with the map to more successful interactions with others. You will learn:

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

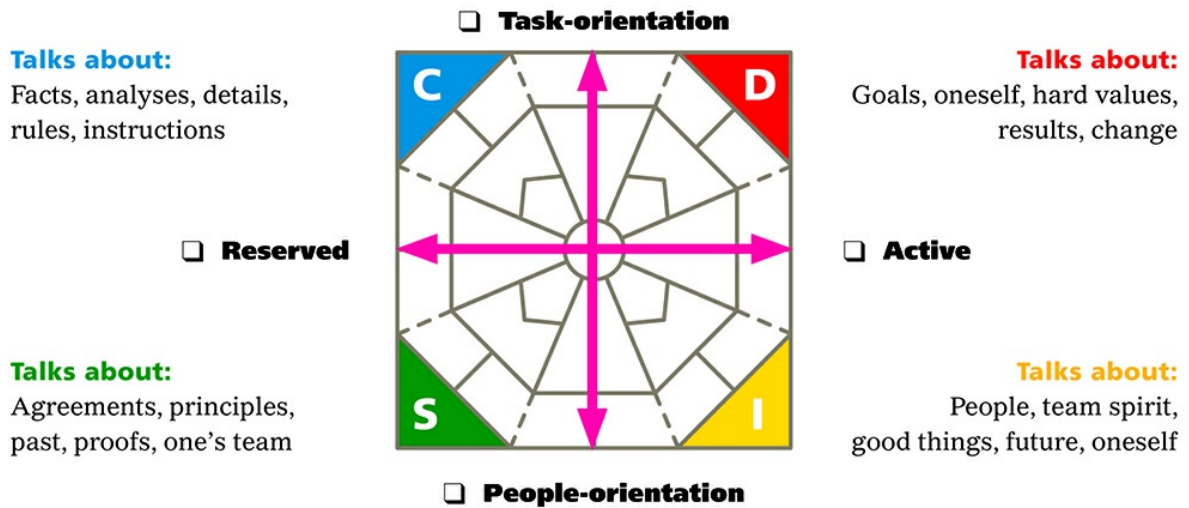




Very Brief Background of the Extended DISC® Model

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

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

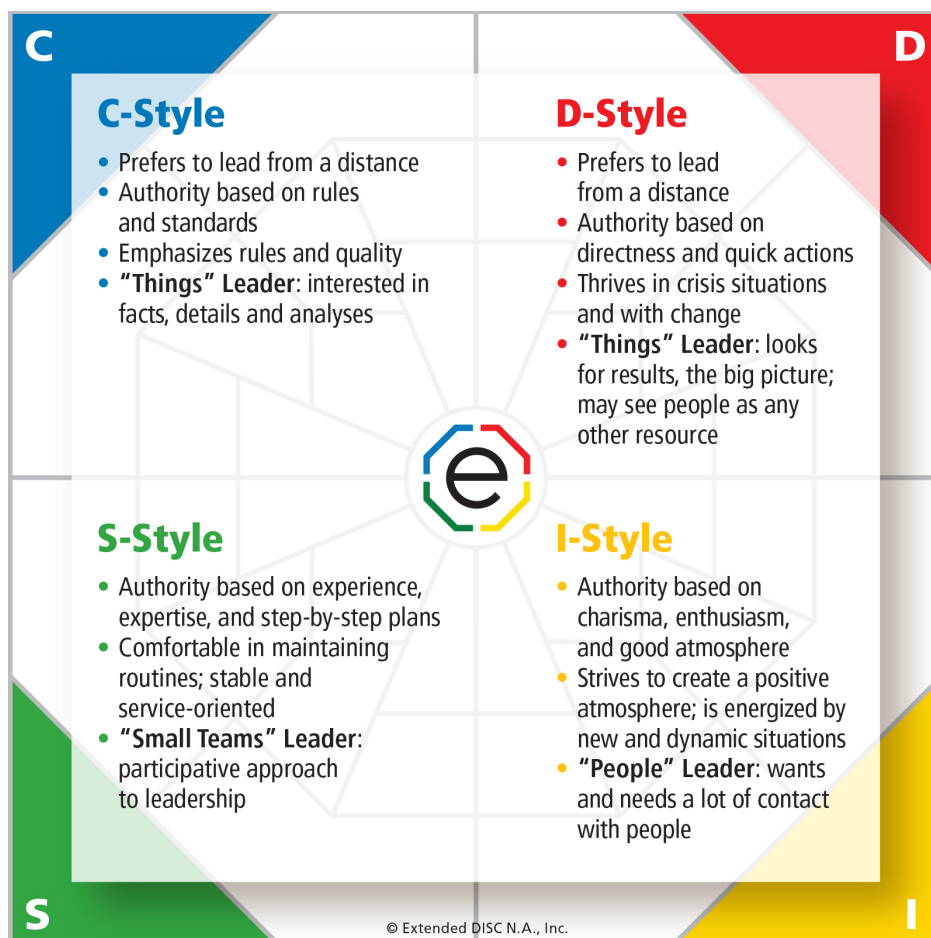




The DISC Behavioral Styles - The Key points:

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

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





Your Leadership Profiles

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

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

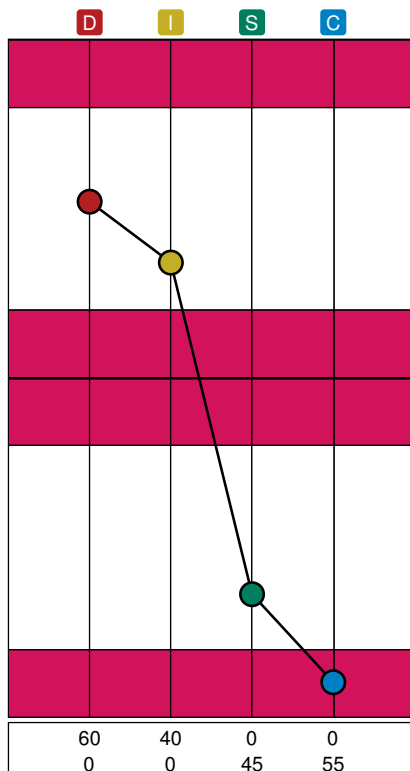
Profile II: Natural Style - Your natural style remains fairly stable, but not rigid, over your adult life. It is the style that is most comfortable to you and uses the least energy. Most individuals are a combination of styles.

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

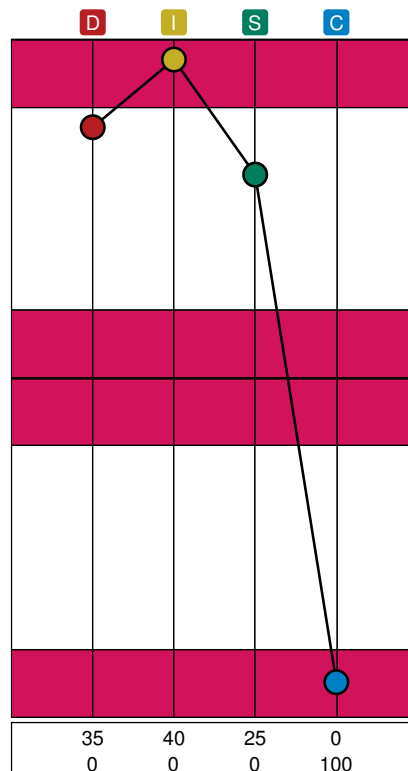
There are no good or bad behavioral styles - just different ones.

Your Profile I and II

Profile I - Perceived Need to Adjust



Profile II - Natural Style



Your DISC style is: IDS (I - 40%, D - 35%, S - 25%)



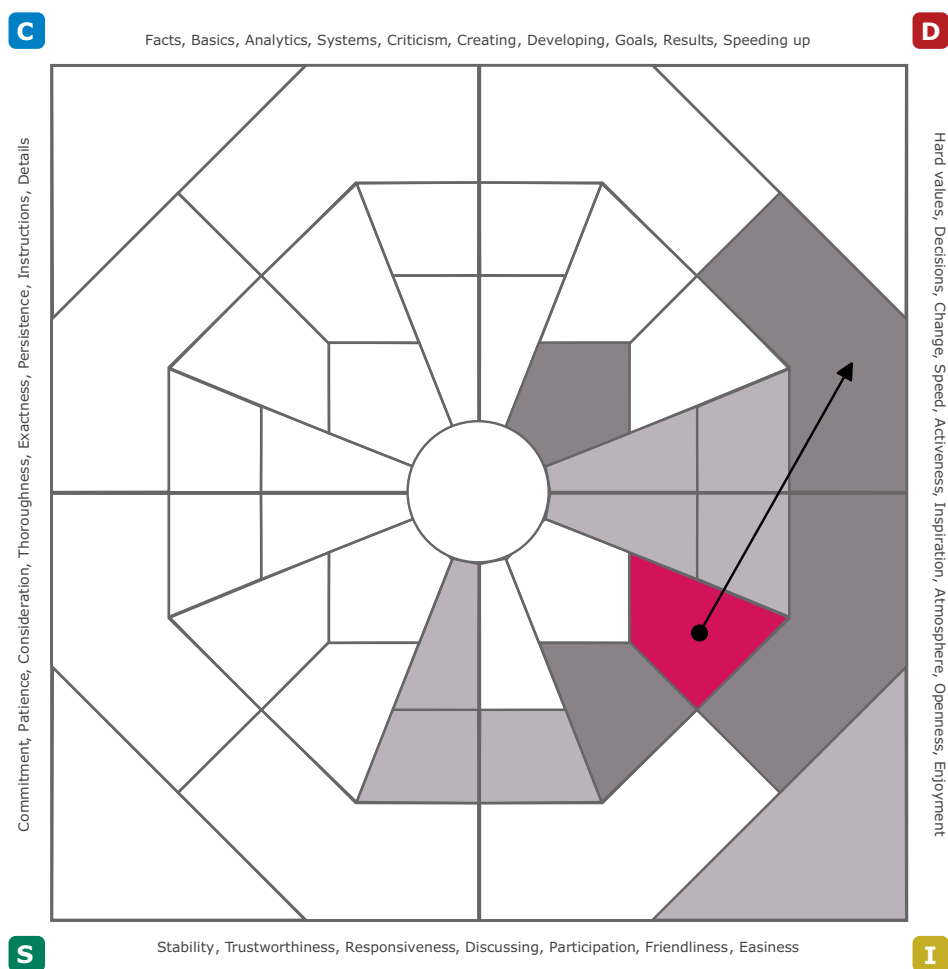
Your DISC Style

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

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

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

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





Sam at a Glance

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

How Your Employees May Perceive You:

Social, pleasant, sociable, thorough, organized, goal-oriented, ambitious, independent, emotionally unyielding, nice, easy to approach, people-oriented.

How Your Employees May Perceive Your Communication Style:

This person has sometimes been described as a pleasant, people-oriented but purposeful conversationalist. He is able to encourage and inspire people, take the team's interest into account and guide his team toward the goal. He is not so receptive a listener as he seems.

How Your Employees May Perceive Your Decision-making:

He can certainly be a good, deliberate decision maker in his field. In new matters, he may superficially analyze the facts and to some extent trusts his intuition. Sometimes he can be cheated by involving emotions.

Sam's Strengths:

- Is competitive in a people-oriented way
- Can keep people motivated
- Doesn't crush others when changing things
- Takes notice of emotions
- Can generate ideas
- Has a longer perspective in perceiving things
- Can sell his ideas to others
- Dares to work without instructions
- Is encouraging and positive
- Can be patient
- Does what is best for the team
- Likes people

"Knowing yourself is the beginning of all wisdom."

- Aristotle



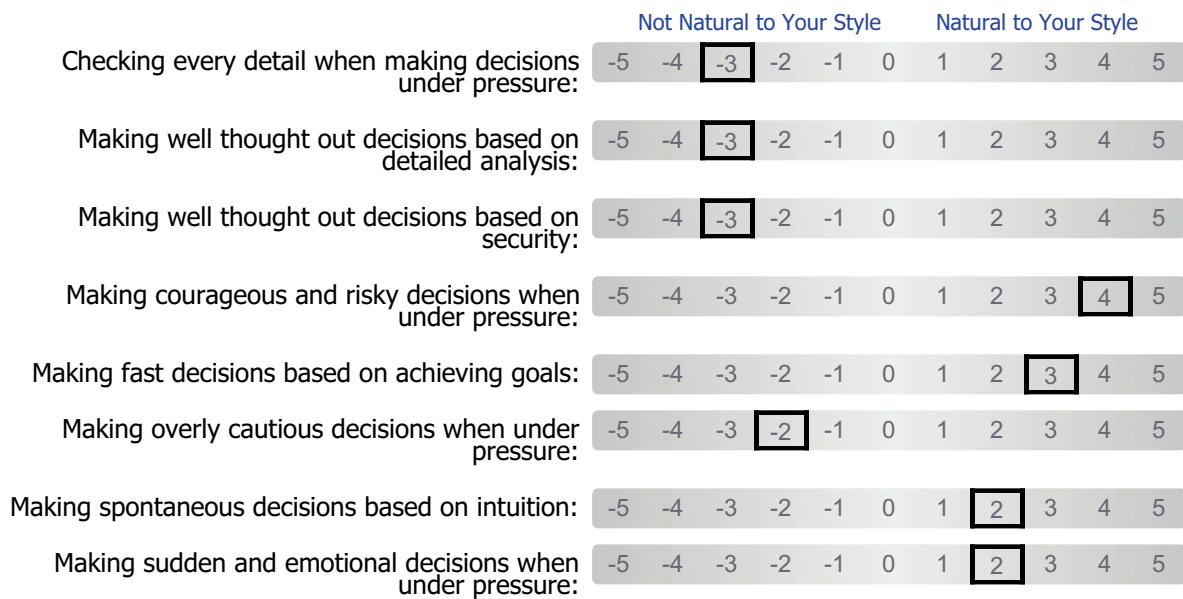
Your Decision-Making Style

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

Interpreting the bar graphs is simple:

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

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



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



How Your Employees View your Decision-Making Style

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

Sam, this is how your decision-making style may come across to your employees.

He can certainly be a good, deliberate decision maker in his field. In new matters, he may superficially analyze the facts and to some extent trusts his intuition. Sometimes he can be cheated by involving emotions.

- Wants to make quick decisions
- Brings up decisive ideas
- Does not analyze all the alternatives

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

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



Your Motivators

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

Sam is motivated by social human contacts, good human relationships, acceptance in the team and cooperation. Actually he is not a person who could work for others, but he likes to create good environment and enjoys putting people in a good mood. He likes independence inside an organized company. Sam also needs a certain amount of freedom.

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

- Good and lively friends
- Positive and excited atmosphere
- Freedom in how to take care of responsibilities
- People who are easy to get involved
- Openness in communication
- Freedom from detailed tasks
- Possibility to come along
- Free discussion
- Lofty ideas and changes to work with them
- Having own opinion been heard
- New opportunities
- Positive way to promote things

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

1 _____

2 _____

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



Situations that Reduce Your Motivation

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

- Dryness and boredom
- Dull routines
- Being separated from people
- Progressive changes being prohibited
- Detailed instructions
- Losing popularity
- Own team breaking up
- Coldness and toughness
- Restrictions
- Facts-oriented thinking
- Getting stuck in one place
- Bad team-spirit

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

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

1 _____

2 _____

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



Your Strengths

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

- Is competitive in a people-oriented way
- Can keep people motivated
- Doesn't crush others when changing things
- Takes notice of emotions
- Can generate ideas
- Has a longer perspective in perceiving things
- Can sell his ideas to others
- Dares to work without instructions
- Is encouraging and positive
- Can be patient
- Does what is best for the team
- Likes people

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

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

1 _____

2 _____

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



Reactions to Pressure Situations

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

- Makes inaccurate assessments
- Operates superficially
- Allows emotions to influence himself
- Tries to please too much
- Doesn't behave directly
- Doesn't always expose his real opinions
- Needs popularity
- Spends too much time with people
- Makes mistakes by being inaccurate
- Thinks about himself a little bit too much
- Gets excited without proper analysis
- Wants to retain friends at any cost





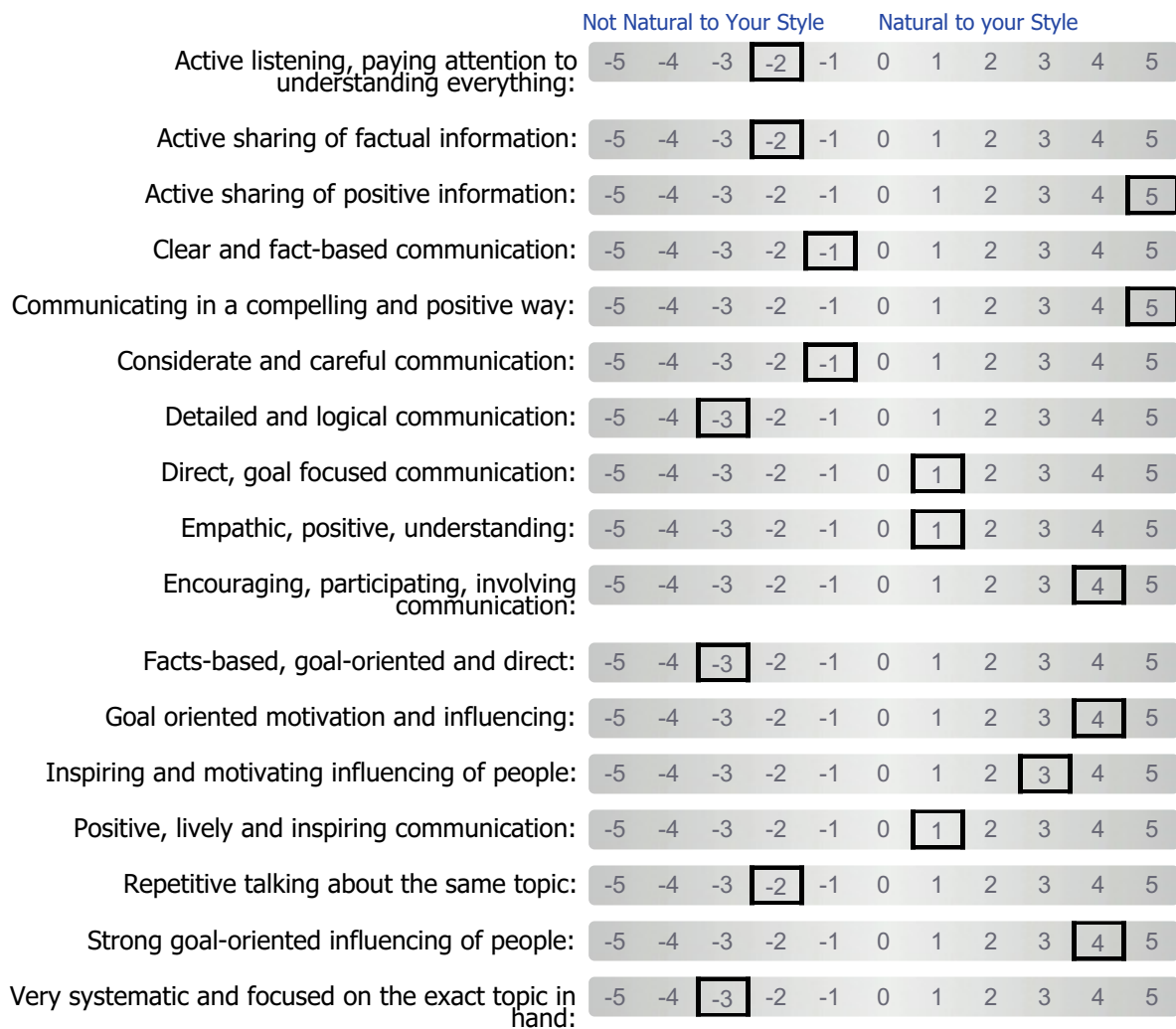
Your Communication Style

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

Interpreting the bar graphs is simple:

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

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





How Others View Your Communication Style

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

Sam, this is how others may perceive your communication style.

This person has sometimes been described as a pleasant, people-oriented but purposeful conversationalist. He is able to encourage and inspire people, take the team's interest into account and guide his team toward the goal. He is not so receptive a listener as he seems.

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

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

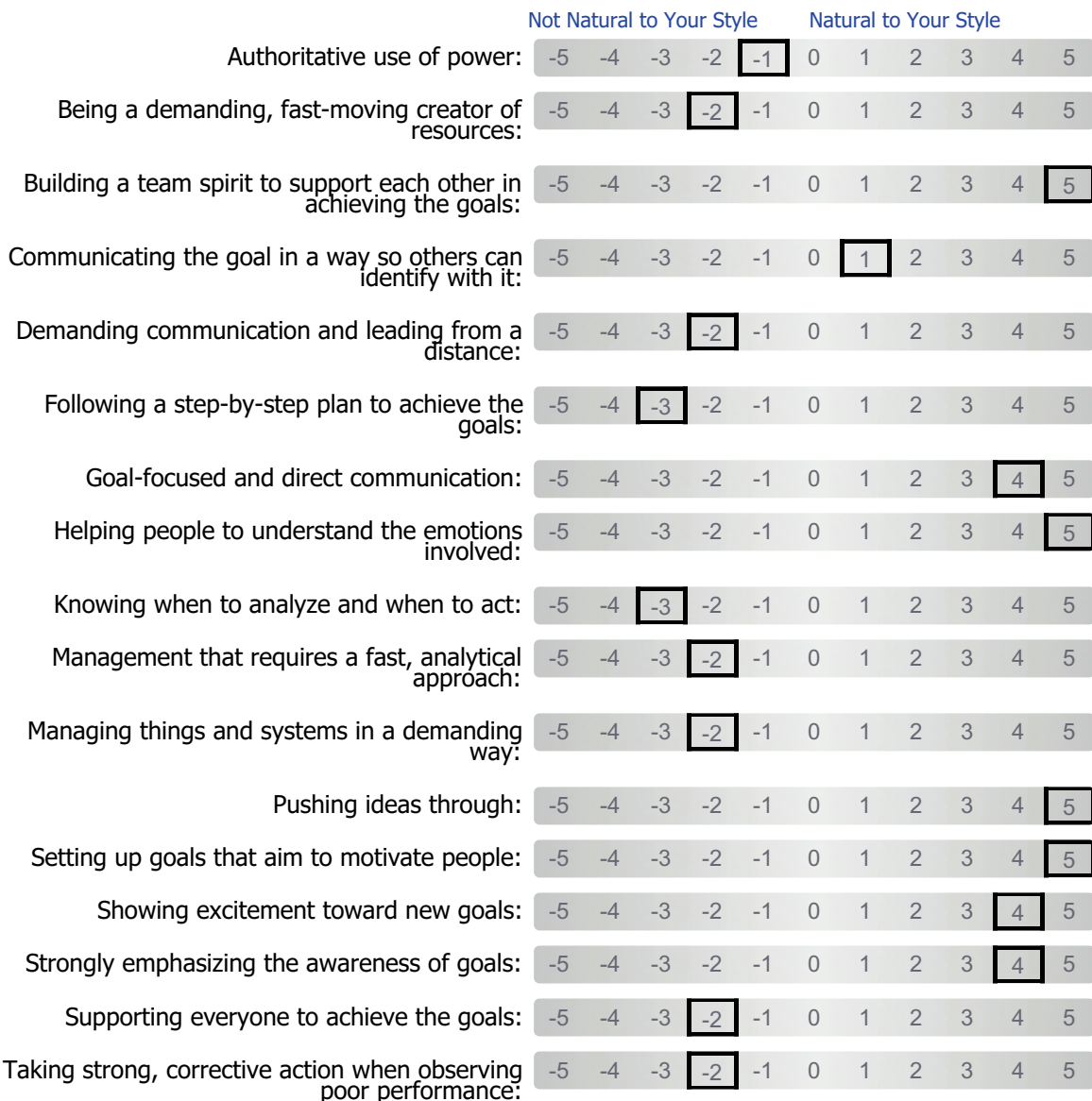


How You Achieve Your Goals

Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify how you prefer to achieve your goals. These items require very little energy.

The **rectangles to the left side** of the graph identify items requiring more energy from you. You **CAN** achieve your goals in this way, but they are likely to require more energy and concentration.



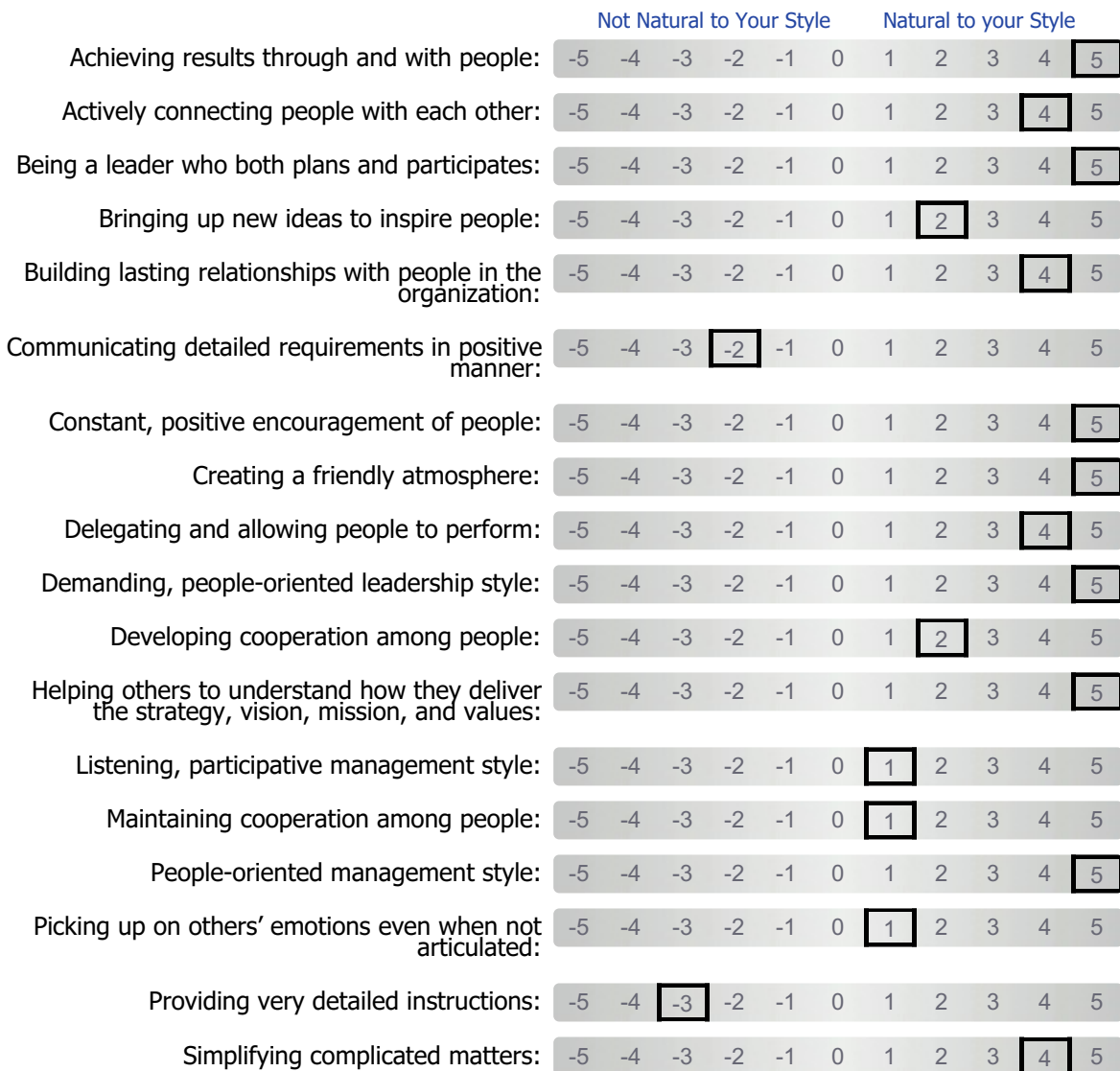


How You Lead Your Employees

Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify how you prefer to lead your employees. These items require very little energy.

The **rectangles to the left side** of the graph identify items requiring more energy from you. You **CAN** lead in this way, but they are likely to require more energy and concentration.



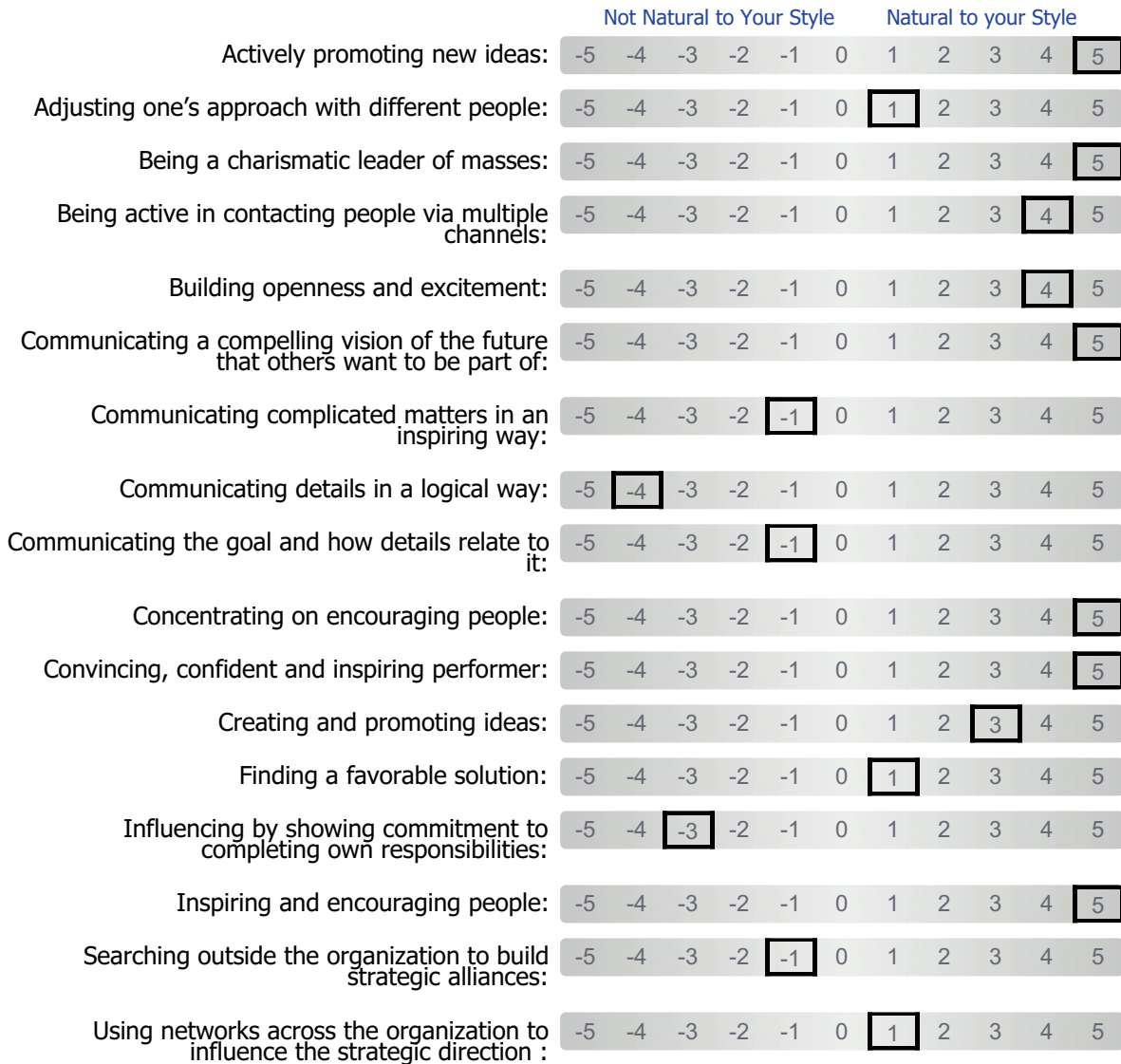


How You Motivate Your Employees

Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify how you prefer to motivate your employees.

The **rectangles to the left side** of the graph identify items requiring more energy from you. You **CAN** motivate in these ways, but they are likely to require more energy and concentration.



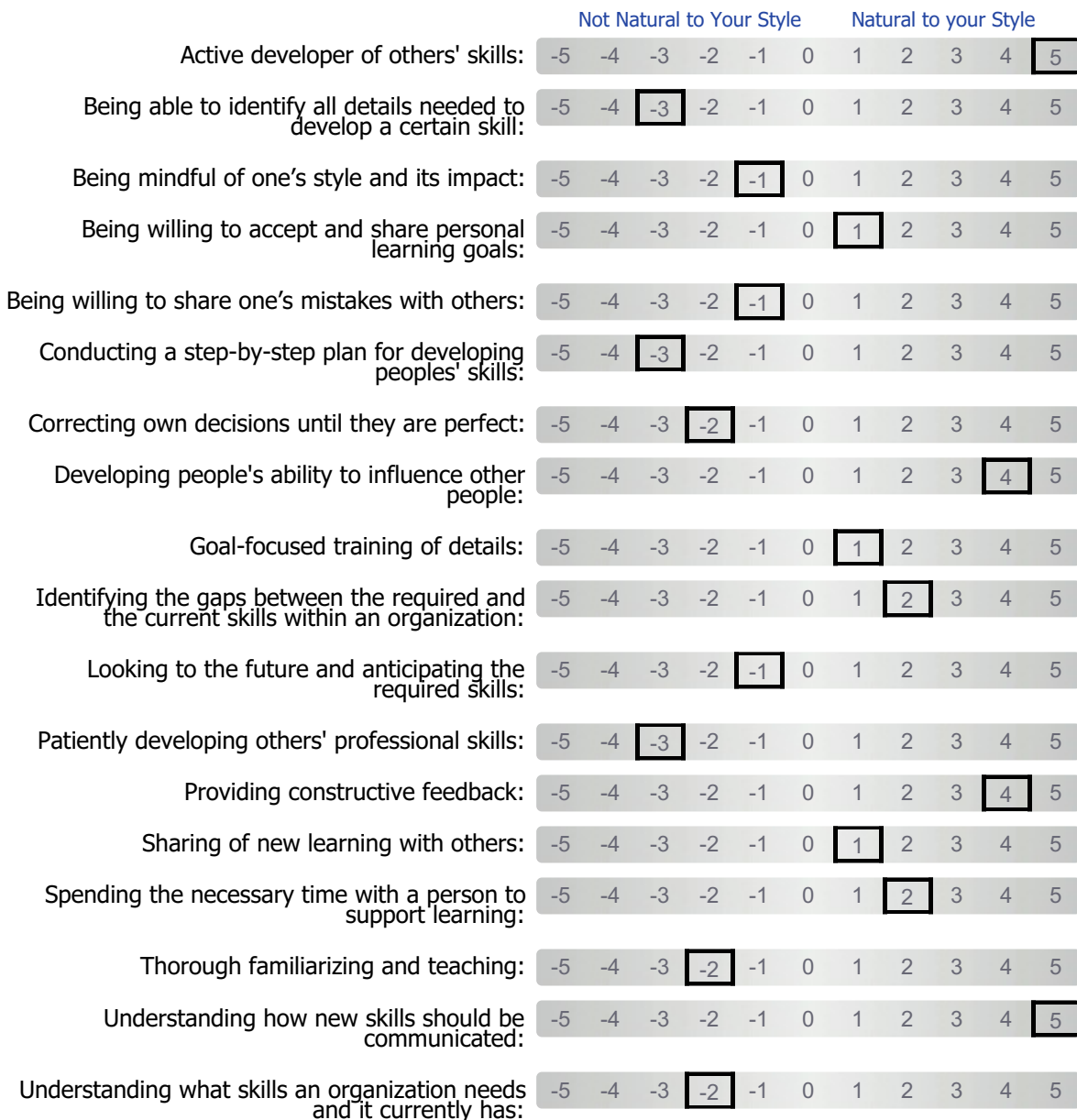


How You Develop Your Employees

Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify how you prefer to develop your employees. These items require very little energy.

The **rectangles to the left side** of the graph identify items requiring more energy from you. You **CAN** develop your employees in this way, but these items are likely to require more energy and concentration.



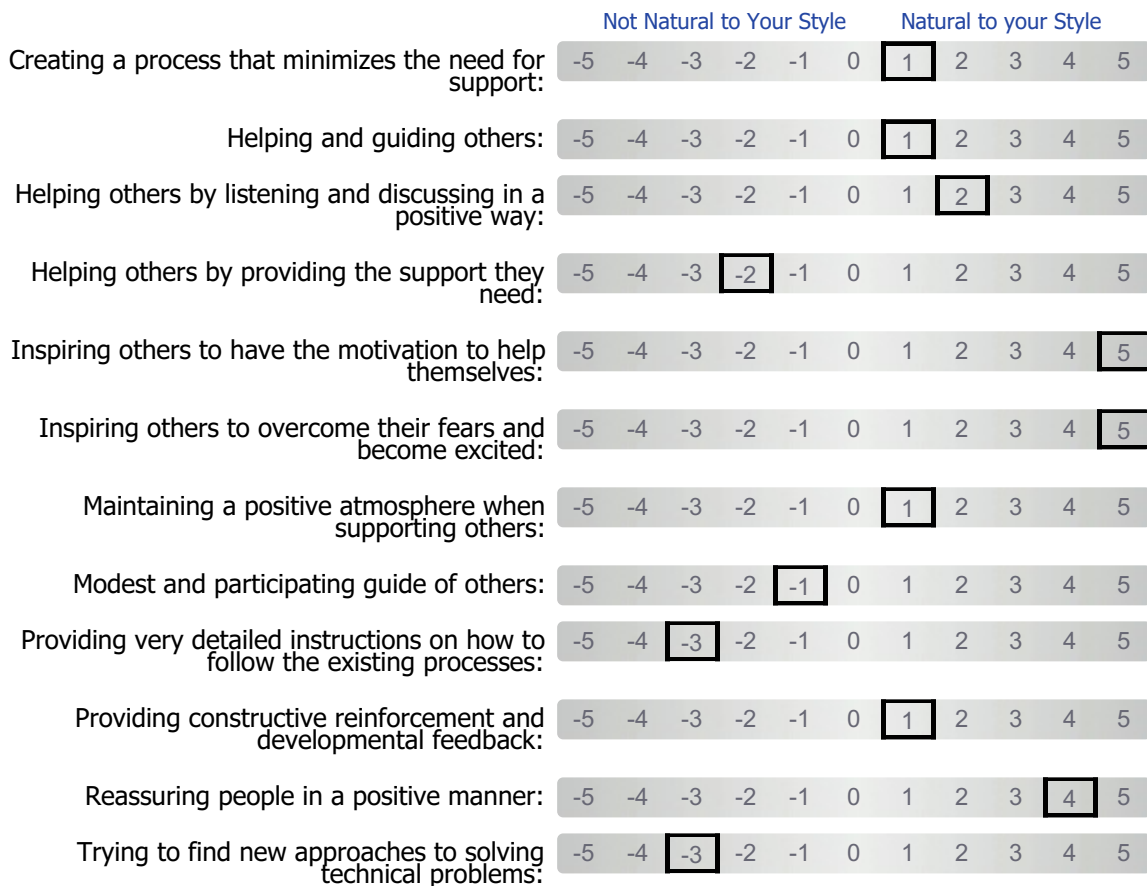


How You Help Your Employees Achieve Their Goals

Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify how you prefer to help your employees. These items require very little energy.

The **rectangles to the left side** of the graph identify items requiring more energy from you. You **CAN** help your employees in this way, but these items are likely to require more energy and concentration.





Improving Your Success As A Manager

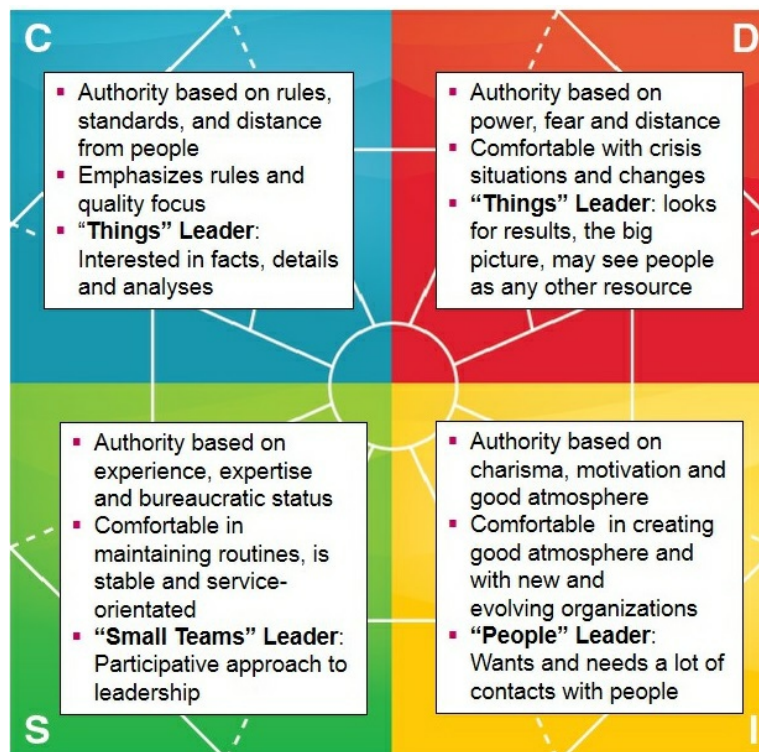
Sam, below are a few reminders and suggestions on how to further improve your success as a Manager.

Reminders:

- Try to keep your written communication as matter-of-fact as possible
- Learn to find the errors - and do something about them
- Learn to ask for and listen to feedback about what you say
- Make sure you have a detailed follow-up system - and that everybody is aware of it
- Create a system that identifies the problems when they occur
- Go through the trouble of writing down how things should be done
- Set aside time for people who demand more information

Suggestions of What to Avoid:

- Spend less time with people than you prefer to
- Do not take quality for granted - create a system that rewards quality
- Interfere with the experts' work as little as possible
- Do not assume that policies and procedures on quality is enough to achieve quality
- Be careful not to implement bigger and bigger changes
- Encourage employees to analyze their own situation without saying what you think it is
- Do not make people compete too much





How to Identify Others' Styles

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

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

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

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

Step 1: Observe

When you meet someone, pay attention to traits such as:

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

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

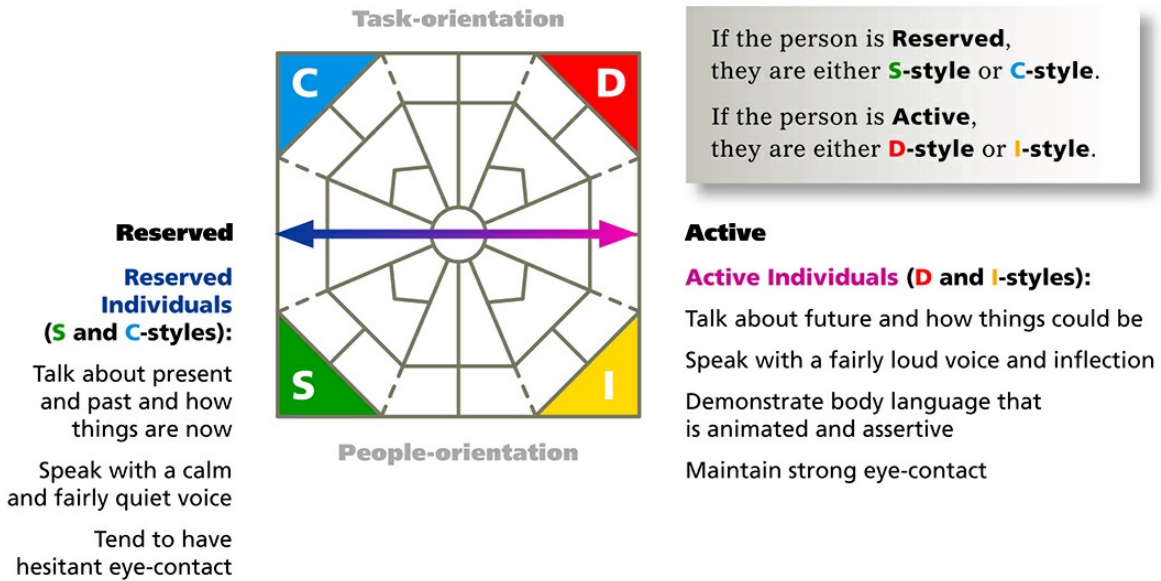




Step 2: Assess

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

- Active
- Reserved



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

- Talks about future and how things could be
- Speaks with a fairly loud voice and inflection
- Demonstrates body language that is animated and assertive
- Maintains strong eye-contact

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

- Talks about present and past and how things are now
- Speaks with a calm and fairly quiet voice
- Demonstrates body language that is limited
- Tends to have hesitant eye-contact



Next, determine if the individual is more:

- Task-oriented
- People-oriented

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

Task-oriented Individuals (C and D-styles):
Talk and ask about things
Focus more on tasks than people
Do not show a lot of emotion

Active

Reserved People-oriented Individuals (S and I-styles):
Talk and ask about people
Focus more on people than tasks
Show emotion fairly easily

If the person is **Task-oriented**, they are either **D-style** or **C-style**.
If the person is **People-oriented**, they are either **I-style** or **S-style**.

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

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

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

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



Step 3: Recognize

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

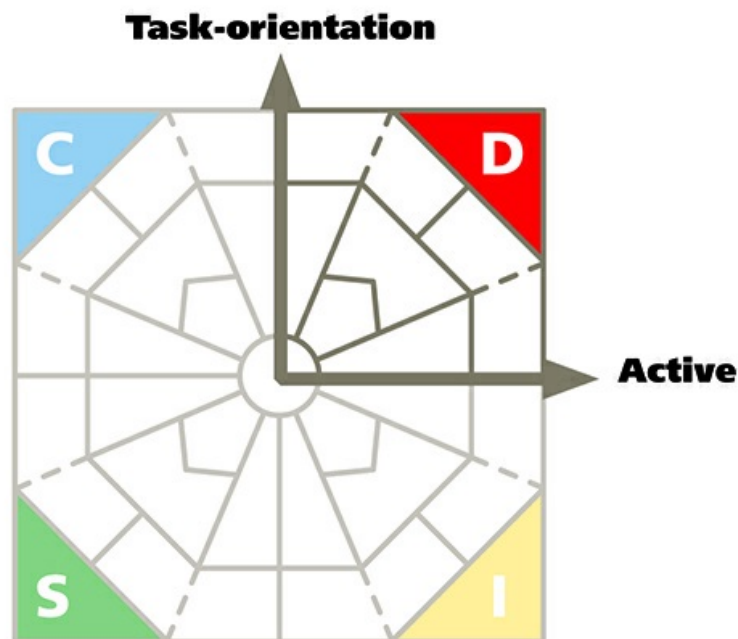
D-style = Active and Task-oriented

This is how to recognize D-styles.

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

How to identify D-styles:

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





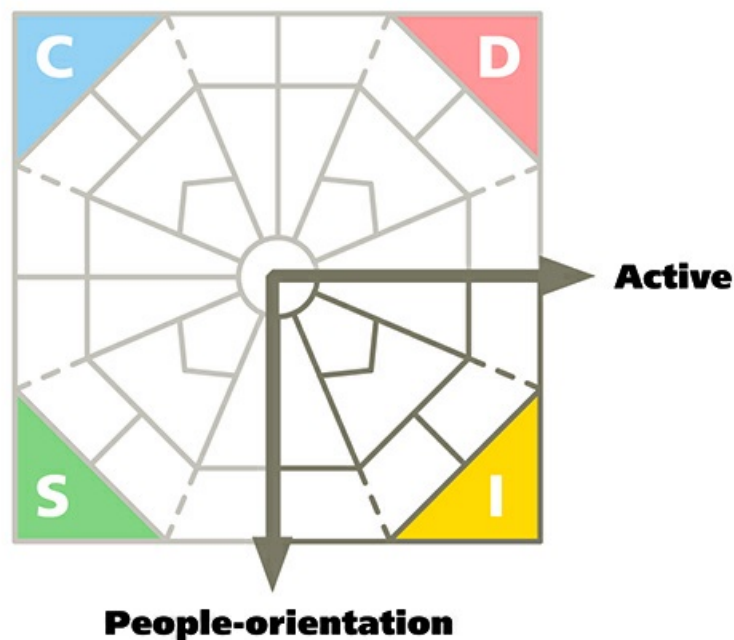
I-style = Active and People-oriented

This is how to recognize I-styles.

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

How to identify I-styles:

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





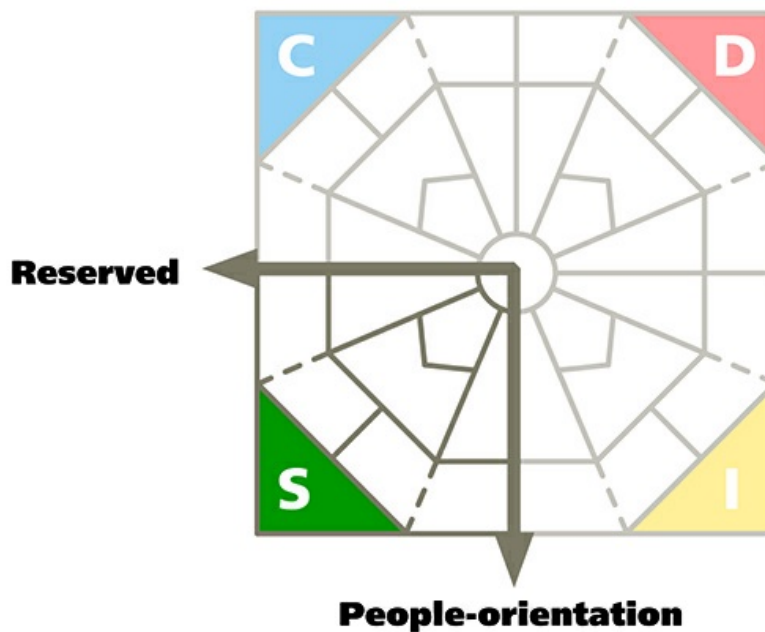
S-style = Reserved and People-oriented

This is how to recognize S-styles.

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

How to identify S-styles:

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





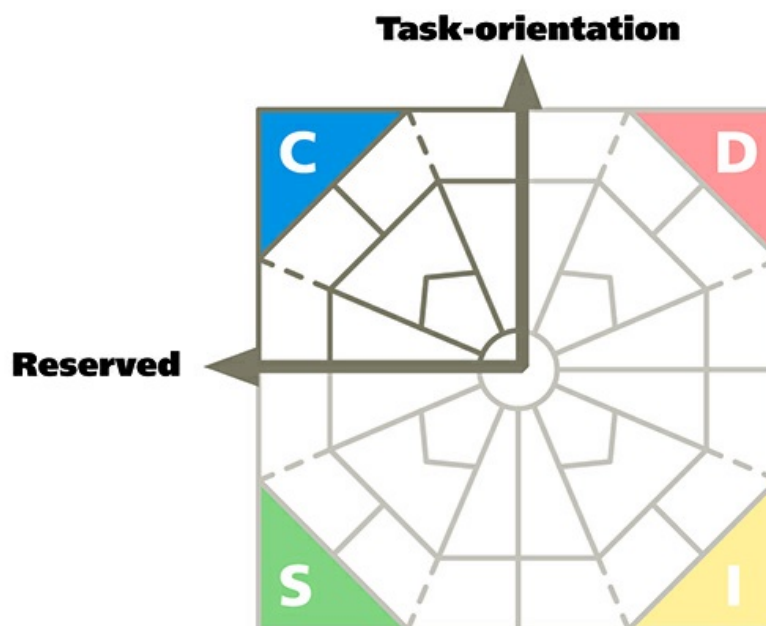
C-style = Reserved and Task-oriented

This is how to recognize C-styles.

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

How to identify C-styles:

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





D-styles

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

- Winston Churchill

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

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

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

Motto: I did it my way.

Focus: Actively controls tasks and things.

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

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

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

Communication Style:

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



Sam, when communicating with a D-style, remember to:

- Show you are strong, while also respecting their strength
- Summarize the main points that you have discussed and agreed upon
- Focus on the topic in your product presentation
- Justify your opinions to them
- Be very systematic and concise in what you say
- Offer them other topics of discussion but let them decide what to talk about
- Create a friendship where they have control

Sam, what not to do with D-style:

- Do not be friendlier than they are
- Do not talk for too long - let them control how much you talk
- Be careful not to be too personal unless they give you permission to be
- Do not try to sweet talk them
- Be careful that the conversation does not get side-tracked
- Never offer them only one option - let them decide
- Never try to be better than they are

Notes:



I-Styles

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

- Dr. Seuss

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

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

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

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

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

Focus: Actively involved with people and emotions.

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

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

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

Communication Style:

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



Sam, when communicating with an I-style, remember to:

- Talk briefly and clearly, offer them more opportunities to talk
- Get to the point but do not talk for long
- Try to get them to talk
- Let them tell the best story
- Make sure you are not pushy
- Show that you are also interested in the topic and are not just trying to sell
- Be prepared to listen a lot

Sam, what not to do with an I-style:

- Do not interrupt them if they get excited
- Do not control the discussion
- Do not forget that having fun does not always equal getting their business
- Do not get them enthusiastic about something they will postpone later
- Do not progress faster than they are willing to
- Do not let them drift to another topic
- Do not take everything they say literally – they are emotional and may embellish at times

Notes:



S-Styles

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

- Calvin Coolidge

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

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

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

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

Focus: Involved with familiar people.

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

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

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

Communication Style:

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



Sam, when communicating with an S-style, remember to:

- Use a modest tone of voice
- Provide them with all of the facts they need
- Provide an overview of what you are going to say before you begin
- Progress step-by-step
- Demonstrate that you are honestly trying to help them
- Do not patronize them - even if they let you to
- Listen carefully to what they say

Sam, what not to do with an S-style:

- Do not force them to talk before they are ready
- Do not forget to cover every issue
- Do not brag too much
- Do not forget what you have promised
- Do not assume that they like you when they are polite to you
- Make sure that you are not cursory about anything
- Do not forget what they have said

Notes:



C-Styles

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

- Albert Einstein

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

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

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

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

Focus: Analyzes tasks and things.

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

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

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

Communication Style:

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



Sam, when communicating with a C-style, remember to:

- Set aside time proving the quality of your product/service
- Maintain the distance they want to keep
- Provide them with more facts than they have asked for
- If you require anything from them, state it well in advance
- Be prepared to present all possible details but do not do it before they ask for them
- Cover one topic at a time and do not skip anything too quickly
- Talk more about the product/service than about them

Sam, what not to do with a C-style:

- Never allow them to think your product is anything but of the highest quality
- Do not get caught giving inaccurate information
- Do not forget to cover the available support and guarantees
- Avoid trying to take them into situations they would consider silly and professionally not challenging
- Do not bore them by explaining to them what they consider basic knowledge
- Do not forget to ask what they consider important
- Do not be overly friendly before they allow you to be

Notes:



Personal Action Plan: Your Next Steps

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

My Top 3 Start and Stop List:

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

- 1 _____
- 2 _____
- 3 _____

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

- 1 _____
- 2 _____
- 3 _____

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

- 1 _____
- 2 _____
- 3 _____

