



Customer-Client- Coach Planner

John G. Geier, Ph.D.
Dorothy E. Downey, M.S.

Company:

Name:

Position:

Coach/Counselor:

Date:

A quality aid to enhance conversations with customers
and for service people in office-based or field work

- | Evaluate the customer's personality
- | Gain an overview of the four behavioral styles
- | Plan your conversation by gearing it to the customer
- | Adapt your sales strategy to suit the customer's needs

Step 1: Select Responses

Identify the behavior tendencies of the customer. Begin with the left column.

Name of Customer: _____

"Most" Tendencies

- Study the eight sets of items.
Choose one phrase in each group that is most descriptive of the customer behavior.
Scratch that area in the "Most" column.
A letter will appear.

"Least" Tendencies

- Study the eight sets of items.
Choose one word in each group that is least descriptive of the customer behavior.
Scratch that area in the "Least" column.
A letter will appear.

PART I "Most" Tendencies

Form for Part I "Most" Tendencies with 8 numbered sections and a 'MOST' column.

PART II "Least" Tendencies

Form for Part II "Least" Tendencies with 8 numbered sections and a 'LEAST' column.

Step 2: Tally the Responses

- Count up all the D's that appear in both the "Most" and "Least" columns. Enter this as a score for the D factor in the profile tally box to the right.
- Repeat the procedure for the remaining letters: I, S, and C.
- The grand total should equal 16.

Plot the numbers from the tally box on the graph. The profile graph allows one to get a better picture of a customer's behavioral tendencies, bearing in mind that it's how one perceives this person in a specific situation.

Step 3: Plot the Graph

- Plot the D sum (from the tally box to the right) on the D scale on the graph.
- Plot the I, S, and C sums in the same way.
- Connect the four plotting points.
- Circle the highest plotting point on the D, I, S, C graph.

	D	I	S	C
	1	2	3	4
100	16	16	16	16
90	10	11	11	10
80	9	10	10	9
	8	9	8	8
70	7	8	7	7
	5	7	6	5
60	4			4
		6	5	
50		5	4	
		4		
40	3	3	3	3
	2	2	2	2
30				
20	1	1	1	1
10	0	0	0	0

D	I	S	C
---	---	---	---

Tally Box

	1	2	3	4
	Dominant	Influencing	Steady	Cautious
Interview atmosphere ...	business-like	positive, committed	personal	serious
Bearing ...	quick/determined: get to the point	quick/spontaneous: be stimulating	slow/relaxed: be pleasant	slow/systematic: be precise
Formulate things ...	briefly and precisely	simply and informally	in a warm and friendly way	in detail and with precision
Spare a dialogue partner ...	time-wasting	effort/expense	conflicts	trouble
Support the ...	goals	projects	feelings	approach
Ask about needs ...	What's the advantage?	Who is recommending?	How is it used?	Why is it useful?
Refer to these features ...	new, improved, quick, simple	profitable, fun, attracts attention	saves money, first-class customer-service, durable	quality, safety, no problems to fear
Offer as decision-making aids ...	opinions, sound evaluations	reference customers	security, customer service	documents with precise explanations
Under pressure ...	dominating/impatient	manipulative/disorganized	submissive/indecisive	compliance/stubborn
Dislikes ...	when others make decisions for them; when they have the feeling of being monitored	having to deal with complex details; having to opt for an alternative	talking about unpleasant subjects and disciplining people; implementing new systems when the previous ones still work very well	presentations without a structure; imprecise explanations, flattery, persuasion and cajoling

Customer-Client-Coach Planner

Information for Preparation

- Circle the number at the top of the column that contains the highest plotting point of the customer.
- If the highest plotting point is not established clearly because there are two equally high plotting points, treat the first, left-most highest plotting point as the highest. Read the interpretation for that plotting point, then the information on the second equally high plotting point and for all of the other plotting points above the midline. On the basis of this information, prepare yourself for the sales talk.
- Study the information in the column marked 1, 2, 3 or 4 that corresponds to this number.
- Incorporate the information stated about the customer specific behavior in your preparation and in your interaction with him or her

	D	I	S	C
Sales	Dominant	Influencing	Steady	Cautious
Aligning thoughts to the customer Remember that "D" has a good feeling about competitive situations; wants to make decisions and would like to be autonomous.	... "I" likes being surrounded by new things that underpin his status and regards himself as innovative.	... "S" appreciates tried and tested things, assesses new things on the basis of his experience and is very open-minded about things that support his processes.	... "C" appreciates structured, logical information that answers questions rather than raising them.
Open the interview	Limit the "social chit-chat" (brief warm-up). Get to the point quickly; refer to the goal and the results.	Be relaxed and friendly. Approach "I" more emotionally and satisfy his expectations of cooperation.	Start informally. Don't allow any time or decision-making pressure to emerge. Begin step-by-step with the information.	Get to the point quickly but politely. Don't force yourself into "C"'s area of competence. Acknowledge "C"'s expert knowledge.
Identify the needs Ask and answer questions	<ul style="list-style-type: none"> Clearly and concisely, explaining the benefits Ask direct questions to clarify what needs "D" sees. Argue on the basis of the core benefits. Expect "What" questions. 	<ul style="list-style-type: none"> Lively and vividly Ask open questions to find out "I"'s buying motives. Gear yourself towards individually tailored product inquiries. Be inspiring. Expect "Who" questions. 	<ul style="list-style-type: none"> Reliably and friendly In your questions, show that you are trying to understand "S"'s processes and needs. Pay tribute to his work. Expect "How" questions. 	<ul style="list-style-type: none"> Politely and competently Ask questions which encourage "C" to express his scepticism. Take it seriously and show specialist knowledge when answering his questions. Expect "Why" questions.
Satisfy the needs	<ul style="list-style-type: none"> Performance Goal Decision-making freedom 	<ul style="list-style-type: none"> Prestige and image gain Flexibility Fun factor 	<ul style="list-style-type: none"> Stability and harmonious processes Reliability Safeguarding 	<ul style="list-style-type: none"> Respect Logic and structure Standards
Formulate the benefits	Accept "D"'s direct way of giving you feedback. Clearly show that you have understood the need and focus on the results that can be achieved.	Show understanding for feelings and doubts. Back up your examples with well known references and give ideas.	Show an interest in "S"'s personal situation. Clearly stress your services and support. Objections will possibly be referred to only indirectly.	Don't make any assertions or assumptions; instead, substantiate your statements. Don't take critical questions personally.
Conclude the interview	Offer "D" several alternatives. Let "D" make the decisions himself. Conclude things quickly and directly.	Be optimistic. Give "I" ideas about what he can do. Assume that your offer will be accepted.	Safeguard "S"'s decision by going through each individual step. Get every step confirmed and move to the order without being pushy.	Accept "C"'s approach. Clarify the priorities and announce a contractual talk after allowing reasonable time to think about it.
Service Customers expect quick and smooth handling of the delivery – punctual and without delay. In the event of delay, provide prompt information without having to be asked. Keep all promises and options.	... you to offer help and service which guarantee an uncomplicated and stress-free course of events. Accept further needs and ideas. Remain the personal contact.	... personal accessibility for answering queries; a reliable partnership; assistance with problems that arise and dependable planning. Keep all your promises.	... professional processes and advice; implementation of the improvement suggestions and rectification of errors; reliable information; compliance with time and goal requirements.

Step 4: Prepare the Sales Talk

In preparation, focus on the results you obtained on pages 3 and 4. Include this specific information in the selling plan.

Be aware that at any step of your conversation with the customer he/she may decline the offer. Be prepared for this.

Detail your preparation for the conversation with the customer in the space provided below. Anticipate his/her needs and focus on the advantage your product/service has in meeting the customer's needs. Distinguish your product/service from those of all competitors.

Column A	Column B
<p>1. Opening:</p> <p>Begin your conversation on a positive note. Use the insight you gained from the table on page 3 and work it into your preparation. Think about the different ways of openings, for example, opening with a reference, a first visit or a general way of opening.</p>	<p>Tactic/Example:</p>
<p>2. Identify the needs:</p> <p>Reflect on the information from page 4.</p>	<p>Tactic/Example:</p>
<p>3. Satisfy the needs:</p> <p>Adapt your thoughts to the needs of the customer. You may understand his motives as values, desires or goals. Apply your knowledge of the persolog® Personality Factor Model (D-I-S-C) as you work on this topic.</p>	<p>Tactic/Example:</p>
<p>4. Detail advantages/benefits:</p> <p>Describe the advantages/benefits by pointing out how the product or service satisfies the customer's needs.</p>	<p>Tactic/Example:</p>
<p>5. Closing and Service:</p> <p>Support the customer in the buying decision process. Provide information and agree upon the next steps/activities.</p>	<p>Tactic/Example:</p>

Step 5: Reflect on the Sales Process

Reflect on the sales talk. Answer the following questions:

- How did it go?
- What should be improve?
- What points need to be focused when contacting this specific customer again?

Please detail your preparation for the next meeting with the customer in the blank space provided below.

1. Opening:

2. Identify the needs:

3. Satisfy the needs:

4. Describe the advantages/benefits:

5. Closing and Service: