

Customer-Client- Coach Planner

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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: John Smith

"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 with 8 sections for "Most" tendencies. Each section has a title and a list of phrases with a corresponding letter box. Some boxes contain letters like 'D', 'C', 'D', 'D', 'D', 'C', 'D', 'D'.

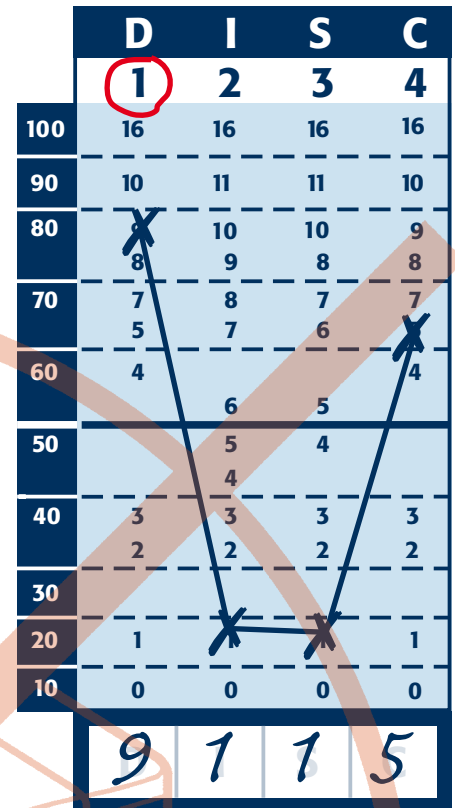
PART II "Least" Tendencies

Form with 8 sections for "Least" tendencies. Each section has a title and a list of words with a corresponding letter box. Some boxes contain letters like 'D', 'D', 'D', 'C', 'C', 'S', 'C', 'D'.

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.



Tally Box

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.

	1	2	3	4
	Dominant	Influencing	Steady	Cautious
Interview atmosphere...	business-like			
Bearing...	quick/determined: get to the point			
Formulate things...	briefly and precisely			
Spare a dialogue partner...	time-wasting			
Support the...	goals			
Ask about needs...	What's the advantage?			
Refer to these features...	new, improved, quick, simple			
Offer as decision-making aids...	opinions, sound evaluations			
Under pressure...	dominating/impatient			
Dislikes...	when others make decisions for them; when they have the feeling of being monitored			

Step 4: Customer/Client Language Behavior

Information for Preparation

- a. Circle the number at the top of the column that contains the highest plotting point of the customer.
- b. Study the information in the column marked 1, 2, 3 or 4 that corresponds to this number.
- c. 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.			
Open the interview	Limit the "social chit-chat" (brief warm-up). Get to the point quickly; refer to the goal and the results.			
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. 			
Satisfy the needs	<ul style="list-style-type: none"> ■ Performance ■ Goal ■ Decision-making freedom 			
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.			
Conclude the interview	Offer "D" several alternatives. Let "D" make the decisions himself. Conclude things quickly and directly.			
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.			

Step 5: Prepare the Sales Talk

In preparation, focus on the results you obtained on pages 2 and 3. 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
1. Opening:	Tactic/Example:
Begin your conversation on a positive note. Use the insight you gained from the table on page 2 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.	<i>The name of the company is Personalis; my name is Peter Miller. Mr. Smith, we recently spoke at the HR trade fair in Cologne about misunderstandings and minor conflicts in the workplace that often hinder the performance of individual employees. I have a plan available for more effective cooperation among employees and I thought of you.</i>
2. Identify the needs:	Tactic/Example:
Reflect on the information from page 3.	<i>What points are particularly important to you in this context?</i>
3. Satisfy the needs:	Tactic/Example:
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 as you work on this topic.	<i>Let us work directly with your staff and their assessment of themselves and others. The result will be fewer conflicts and thus a savings of time, costs and nerves.</i>
4. Detail advantages/benefits:	Tactic/Example:
Describe the advantages/benefits by pointing out how the product or service satisfies the customer's needs.	<i>The respective behavior and thus the different behavior types are analyzed in the seminar. As employees get to know themselves and others better there are fewer points of contention. The bottom line is that employees work together more effectively.</i>
5. Closing and Service:	Tactic/Example:
Support the customer in the buying decision process. Provide information and agree upon the next steps/activities.	<i>We should also talk about developing a tailored concept for you. I would be pleased to meet with you personally, or would you prefer than I call you in two or three days?</i>

Step 6: 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:

Get to the point even more quickly. Take this opportunity to clearly highlight the benefits.

2. Identify the needs:

Formulate initial answers to the "what" questions.

3. Satisfy the needs:

Give your conversational partner a stronger feeling of room for deciding.

4. Describe the advantages/benefits:

Review your core statements on benefits one more time. They need to be even more concise and results-oriented.

5. Closing and Service:

Definitely arrange the time and date of the next telephone appointment.