



Selling for Results[™]

TRACOM[®] GROUP

THE SOCIAL INTELLIGENCE COMPANY[®]

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GET CERTIFIED FOR FREE



REGISTER AT [SOCIALSTYLECERTIFICATION.COM](https://socialstylecertification.com)

WHY GET CERTIFIED?

- Completing your certification prepares you to facilitate any SOCIAL STYLE and Versatility program using Multi-Rater or Self-Perception profiles.
- It's easy! Certification is held completely online with a live facilitator and allows you to participate with other certification candidates to learn the foundational concepts of SOCIAL STYLE and Versatility.
- You will receive an electronic badge that you can display on social media sites.
- Certification takes your facilitation to the next level by teaching with maximum impact and effectiveness!

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Program Overview

Selling for Results™ (SFR) helps salespeople work more effectively with their customers. Participants learn to assess their customers' SOCIAL STYLEs and recognize their unique preferences for working and communicating. Then they develop a specific action plan to apply Versatility by adjusting their behavior to meet customers' Style needs. This results in better communication, understanding, and productivity. Throughout the program, you will use:

- Presentation
- Facilitated Discussion
- Interactive and individual exercises
- Video

The program contains approximately 5 1/2 hours of content, which can be divided into several shorter modules. It can be effectively facilitated with a group of 6 to 25 participants. A minimum number of participants is required to achieve a mix of Styles and an adequate level of interaction in group discussions, while too many participants may present logistical problems that lessen the program's impact. If you cannot avoid larger groups, a second facilitator may be needed.

VIRTUAL AND IN-PERSON DELIVERY

The program can be delivered either virtually or in-person. This guide provides instructions on both modalities; when specific slides or instructions are necessary for virtual delivery, those are clearly indicated in the "Notes" section. With virtual delivery, the exercises can be conducted using "chat" and electronic meeting rooms.

Playing Video with Virtual Delivery

Playing videos with virtual delivery can be challenging. Fortunately, the major virtual platforms have methods in place for playing video. We recommend testing your platform's strategy so you understand its capabilities before you deliver the program. This will help you avoid delays and frustration during the program.

Search using terms such as "how to play video on Zoom" to find the most current methods. Most of the major platforms, such as Zoom, Microsoft Teams, WebEx, Blue Jeans, and Adobe Connect have support pages with advice for playing video.

Program Objectives

At the end of the program, participants will learn:

- How to predict customers' behavior.
- What causes stress for customers.
- How to recognize and meet their customers' needs.
- How to prepare for meetings and tailor communication.
- How to earn customers' trust

Materials and Preparation

IMPORTANT ACTION REQUIRED: Download all facilitator resources (slide deck, videos, et al) for this program at:

teach-SFR.com

To ensure a successful program, become familiar with all materials, including the Participant Workbook, and read the Video Scene Reference section at the end of this guide to help you debrief the SOCIAL STYLE in Action video. Familiarize yourself with the Session Composite Report so you'll know the Style and Versatility breakdowns of the class.

If you're teaching virtually, familiarize yourself with the technology and use multiple screens so you can see the learners along with the PowerPoint deck. Keep people engaged by using the "chat" feature and interactive exercises. For more advice on teaching virtually, see the section titled "Tips for Virtual Delivery" later in this guide.

Profiles

This program includes an online multi-rater profile as pre-work. Prior to attending the session, participants complete an online self-assessment and invite raters to provide feedback. All feedback is aggregated into a personalized profile report for use during the instructor-led session.

The profile comes in two parts: SOCIAL STYLE and Versatility. When possible, the two parts should be delivered at separate times. For in-person delivery, this simply requires having the profiles printed and organized for handing out to participants. For virtual delivery, the options are described below.

VIRTUAL DELIVERY PROFILE OPTIONS

When delivering the program virtually, there are two options for distributing profiles to participants. Note that when participants download their profiles, they receive both SOCIAL STYLE and Versatility sections – these cannot be downloaded separately.

Recommended process: Participants download their Learner profile reports before the program.

- The program administrator can set up your MAX session to automatically send notifications to participants that their profiles are available to download once they are generated.
- Alternatively, the administrator can select a specific date for profiles to be available for download. When using this option, the notification to the Learner must be sent manually as the MAX system does not currently provide notification emails on a specific date.

Note: Both options allow participants to view their results before learning about Style and Versatility in the training so communications to learners should clearly indicate that the profile will be discussed and explained during the program.

Optional process: Participants download their Learner profile reports during the program.

- This option requires that each participant access tracomlearning.com during the program to download their profile.
- Participants will need to login using their username and password (unless they are a single sign-on client, whereby they access their profile via the SSO link).

Note: For sessions with more than 25 people, we do not recommend this process because participants often forget their usernames and passwords, which can disrupt the delivery of the program.

Supporting Reports

Two reports are available to help facilitators prepare for the program: the Session Status Report and the Session Composite Report.

SESSION STATUS REPORT

This report is available in the weeks leading up to a program and describes the number of learners enrolled in the program and each individual's progress toward completing the profile process. It indicates whether each person has adequate data to generate a profile and whether their profile is available for download. It reports how often learners and raters will be reminded and the initial date when profiles will generate.

SESSION COMPOSITE REPORT

This report would be downloaded after learner profile reports have been generated. It helps you understand and plan for group dynamics by showing the number of participants in each Style and Versatility category. Visual displays show each person in their Style sub-quadrant and Versatility quadrant. Detailed information about Self and Rater agreement is also provided. Facilitators can use this information to plan for activities, for instance, dividing people into Style quadrants for the "Style Forum" activity.

HOW TO DOWNLOAD REPORTS IN MAX

Instructions on how to download these reports can be found through the [Need Help?](#) link in TRACOM's MAX Survey Administration system.

- Log into tracommax.com
- Select [Need Help?](#) in the top right hand corner of the screen
- Select the MAX Session Management section
- Select the video or instruction guide that corresponds to your MAX privileges - either [Download Session Reports for Facilitators](#) or [Download Session Reports for Administrators](#)

Video: SOCIAL STYLE in Action

A two-part video is used a number of times during the session:

Introduction	SOCIAL STYLE in Action – Part 1
	Participants will view a team interaction and you will solicit their observations. At this stage, observations are typically subjective descriptions and judgments about the behavior of team members.
Dimensions of Behavior	SOCIAL STYLE in Action – Part 1
	After teaching participants about the two dimensions of behavior, you will play the same video segment a second time and ask participants to observe verbal and non-verbal behaviors for Assertiveness and Responsiveness. At this point, participant observations should start to become more objective compared to their preliminary observations.
SOCIAL STYLE Model	SOCIAL STYLE in Action – Part 1
	You will refer to (but not replay) the video and ask participants to identify each character's SOCIAL STYLE. Later in this section, participants will identify each character's Need, Orientation, and Growth Action.
Versatility Profile	SOCIAL STYLE in Action – Part 2
	In this section, you will play Part 2 of the video and ask participants to observe behaviors of the characters in relation to their Versatility.

Post-Training Application Tools

Participants with generated profiles can login at tracomlearning.com to access SOCIAL STYLE Navigator and Passport.

SOCIAL STYLE NAVIGATOR®

To reinforce and apply learning beyond the classroom, participants have free and unlimited access to SOCIAL STYLE Navigator, a resource that is accessible on phone, tablet or computer. The SOCIAL STYLE Navigator includes:

- **SOCIAL STYLE Estimator**, a brief survey to quickly estimate another person's Style.
- **SOCIAL STYLE Advisor**, to help apply learning in the workplace. Topics are organized into Managerial, Sales and Individual categories, and provide specific advice for working with people of all Styles.
- **E-Learning** modules in three topics: Working in Teams, Coaching and Managing Conflict.

SOCIAL STYLE PASSPORT

Participants also have access to SOCIAL STYLE Passport, a feature that allows them to view how their profile would be scored using norms from another country or region. Participants choose a country and the tool shows their results as scored using that country's norms. This is particularly helpful for people who travel and work internationally.

Tips for Virtual Delivery

This course can be delivered virtually, as outlined in the PowerPoint deck and notes. Virtual training is cost-effective, efficient, flexible, and it expands your teaching skills.

For your learners, virtual training allows them access to coursework and classes from a comfortable, familiar setting—some people actually feel more compelled to contribute when they're in a virtual meeting.

Some common missteps that facilitators make are: eliminating the “icebreaker” to kick things off; allowing too many people to attend; and not seeing the need to be formal.

To avoid these missteps and improve the session, you'll want to:

Manage the content

- Engage your audience early and often
- Design short, engaging segments of 90 minutes or less

Limit class size to 25 or fewer learners

- Otherwise, you're conducting a webinar

Be poised, prepared and professional

- Dress a step above your audience
- Start and end on time
- No distractions on your side of the camera

Make it interactive

- Chats, breakouts, polls
- Ask learners to post their reactions: chat, polls, hand-raising, emojis, etc.

Pre- and post-training assignments

- Online assessments, pre-learning, follow-up exercises

Digitize materials that learners can complete online before, during or after the training

Non-verbal behaviors make it feel personal

- Stand up if possible; give yourself space to emote
- Use your hands, nod, smile, enunciate and make eye contact to break through the screen

Read the room

- Ask people how they're feeling rather than assuming their emotions
- Use 'uncomfortable pauses' to draw engagement
- Call on people who are not contributing
- Listen... *actively*

To make *yourself* better, try:

- Rehearse and record yourself
- Create an environment around you—it's your brand!
- Light yourself from the front
- Invest in an external microphone
- Use additional computer monitors if possible
- Create a pre-session checklist
- Have a backup plan ready in case of technical issues
- Log onto the session 15 minutes prior to its start
- Open all documents prior to entering
- Organize all screens prior to entering and practice beforehand
- Ensure you enter with camera and microphone on
- Ensure you are not showing the "nostril view"
- Ensure your face is well illuminated and you are framed well

How to use SOCIAL STYLE Beyond this Program

This program teaches people how to communicate and work together more effectively, but SOCIAL STYLE and Versatility can affect entire cultures for the better. The skills taught in this program affect areas such as team effectiveness, conflict, coaching, delegation, and emotional intelligence.

Look for opportunities to expand the impact of this program. Here are some ideas:

1. Become familiar with **SOCIAL STYLE Navigator** and make sure your learners know about it and how to access it. This resource contains a wealth of advice that can be used by people in any role or industry. It also contains the Style Estimator, a brief survey to estimate the Style of another person, helping to understand and work more effectively with others.
2. Schedule **regular training programs**, for example quarterly “booster” programs. You can leverage the SOCIAL STYLE Navigator for content.
3. Schedule **eLearning courses** between regular scheduled trainings. In SOCIAL STYLE Navigator there are three additional eLearning modules that you can assign to learners: Coaching with Style, Managing Conflict with Style and Working in Teams with Style.
4. **Tie SOCIAL STYLE and Versatility into other training programs** you are conducting. Whether you are doing technical training, position-specific training, or another soft skills program, you can create conversations and set up exercises where learners discuss Style concepts and how they relate to the topics being discussed.
5. Leverage the Advice section in SOCIAL STYLE Navigator and write down **52 different topics** that are critical to the success of your team members. Turn those 52 topics into a 52-week email campaign where each week you send team members short emails about different topics relating to their SOCIAL STYLE.
6. **Use Style identifiers** in face-to-face and virtual meetings. For face-to-face meetings, print table tents for each person with their Style on it. For virtual meetings, ask team members to edit their name and add their Style at the end of their name. Even if you do not talk about Style specifically, the visuals will serve as a reminder and keep Style relevant in your meetings.
7. **Kick off meetings** by asking team members to share a “SOCIAL STYLE Story” of a situation they experienced recently where they observed Style and Versatility dynamics. This will give people an opportunity to share success stories and learning opportunities.
8. Last, but not least, **TALK ABOUT SOCIAL STYLE**. The more you learn about SOCIAL STYLE and Versatility, the more you will realize it is relevant in every interaction you have and the goals you need to achieve. Imagine teams and organizations of people who understand their Style and consider the Style of others while working with them.

Recommended Agenda

This agenda can be printed as an aid to help you keep track of time during the program. Fill in the specific times for your course in the left column.

Time	Topic(s)	Virtual Time	In Person Time	Slides
	Course Overview <ul style="list-style-type: none"> • Steps for Increasing Interpersonal Effectiveness • What You'll Learn • Versatility: A Key Element of Sales Performance • Introductions • Style in Action Video Part 1 • Exercise: My Customer – First Impressions 	41 Minutes	41 Minutes	1-7
	Dimensions of Behavior <ul style="list-style-type: none"> • Observable Behaviors vs. Personality • Say & Do Behaviors • Assertiveness • Assertiveness Behaviors • Exercise: Assertiveness Observations • Exercise: Customer: Assertiveness Observations • Responsiveness • Responsiveness Behaviors • Exercise: Responsiveness Observations • Exercise: Customer: Responsiveness Observations 	59 Minutes	59 Minutes	8-19
	SOCIAL STYLE Model <ul style="list-style-type: none"> • SOCIAL STYLE Model • SOCIAL STYLE Descriptions • Exercise: Style in Action • Exercise: Customer's SOCIAL STYLE • Need, Orientation, and Growth Action • SOCIAL STYLE Key Characteristics • SOCIAL STYLE Behaviors • Customer Behaviors • Customer Tension • Backup Behavior • Meeting Customer Needs • Observing Style Virtually • Key Points 	67 Minutes	67 Minutes	20-44

Time	Topic(s)	Virtual Time	In Person Time	Slides
	SOCIAL STYLE Profile <ul style="list-style-type: none"> • Assertiveness Norms • Responsiveness Norms • Profile Review • Exercise: Know and Control Yourself • Know Others: Techniques for Observing Style 	39 Minutes	39 Minutes	45-57
	End Module One	206 minutes (3 hours, 26 minutes)	206 minutes (3 hours, 26 minutes)	
	Versatility <ul style="list-style-type: none"> • Versatility Introduction • Four Sources of Versatility • Exercise: Versatility in Action 	21 minutes	21 minutes	58-61
	Versatility Profile <ul style="list-style-type: none"> • Versatility Quadrants • Meaning of Versatility Positions • Overall Versatility • Versatility in Detail • Profile Review 	30 Minutes	30 Minutes	62-70
	Steps for Increasing Interpersonal Effectiveness <ul style="list-style-type: none"> • Preparing for Meetings • Tailoring Messages • Using Versatility to Earn Trust • Exercise: Versatility Action Plan • Observing Versatility Virtually 	65 Minutes	65 Minutes	71-81
	Next Steps <ul style="list-style-type: none"> • SOCIAL STYLE Navigator • SOCIAL STYLE Passport 	7 Minutes	7 Minutes	82-92
	End Module Two	123 minutes (2 hours, 3 minutes)	123 minutes (2 hours, 3 minutes)	
	TOTAL TIME	329 minutes (5 hours, 29 minutes)	329 minutes (5 hours, 29 minutes)	

Slide 1



2 Minutes

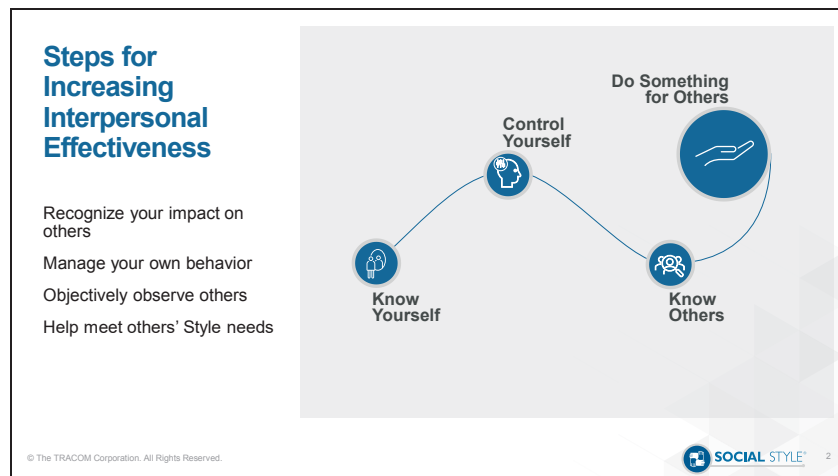
WELCOME participants to the session and **REVIEW** key points about TRACOM's SOCIAL STYLE Model:

- One of the most widely used and highly regarded behavioral models in use today.
- Will help you develop insight about your behavioral strengths and weaknesses, and your customers' behavioral preferences.
- Originally developed in the 1960s by psychologists David Merrill and Roger Reid.
- Used worldwide by millions of people.

PROGRAM BENEFITS

SAY Working successfully with customers depends on developing good relationships. You can do this by understanding your own Style and, more importantly, other people's Styles. This allows you to practice Versatility by adjusting your behavior to meet other people's Style preferences. Research shows that people who consistently show Versatility are more effective in their jobs than people who don't show Versatility.

Slide 2


**5 Minutes (Workbook, page 2)**

SAY This program will bring you on a journey. The ultimate goal is to work more effectively with your customers and others. We'll get there through a process that starts with understanding yourself and how your behavior affects your productivity and relationships. We refer to these as "know yourself" and "control yourself."

Most importantly though, you'll begin to focus on understanding others and their preferences for getting work done. This is called "know others." With this understanding of others' behavioral styles, you'll begin to practice your Versatility, which is "do something for others."

We'll talk more about these four steps later, but as we progress through the program, you'll see how they are applied.

By the end of the program, you'll have insight into your own Style and behavior, and the Style of at least one of your customers. You'll build on this knowledge to develop more effective ways of working with your customers through practicing Versatility.



SOCIAL STYLE

What You'll Learn

1. How to predict customers' behavior.
2. What causes stress for customers.
3. How to recognize and meet their needs.
4. How to prepare for meetings and tailor communication.
5. How to earn customers' trust.

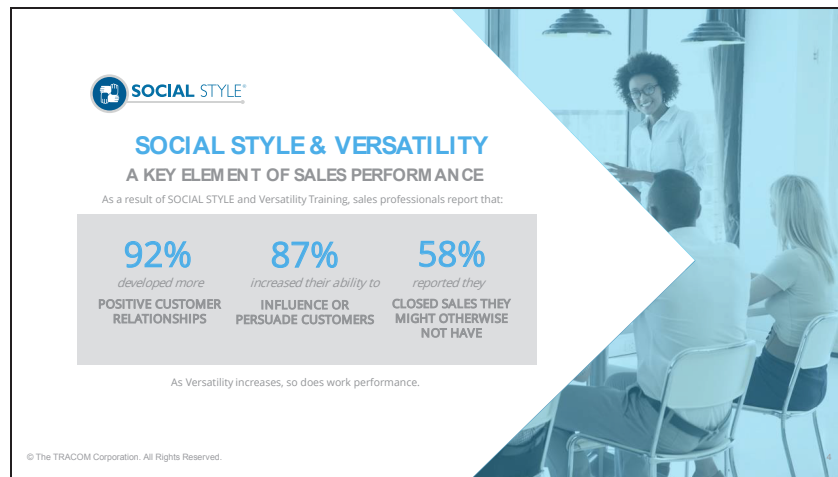
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2 Minutes

SAY Ultimately, this course will help you have more success with your customers. In particular, you're going to learn specific strategies:

- How to predict your customers' behavior, and an understanding of why they behave that way.
- What causes customers to become stressed, and how your own behavior can contribute to this.
- How to recognize their needs and meet those needs.
- How to prepare for meetings and tailor your communication to different customers.
- Ultimately, how to earn their trust.

Slide 4

**2 MINUTES (Workbook, page 4)**

SAY In the first part of the program, you'll learn about Style. This will help you understand your customers and how they prefer to interact with you.

The second part of the program focuses on Versatility, which is how well you meet others' Style needs.

Versatility is the application of SOCIAL STYLE—when you understand your customers' Style needs, you can help them meet those needs. This helps them feel more valued and sets the stage for them to have a better relationship with you. If you consistently show Versatility, you can be more effective.

You can read the stats on this slide. Research has found that salespeople who practice SOCIAL STYLE and Versatility have more success.



10 Minutes

Have participants introduce themselves by revealing the topics listed on the slide.

ASK participants to think of one customer they have a difficult relationship with, and briefly describe their main frustration(s) with this person **WITHOUT NAMING THE PERSON**.

If Group is too large for verbal introductions, do this through chat.


TIP: You might want to record participants' **“What is Most Frustrating”** on a flip chart (or virtual white board). The purpose of the session is to learn how to improve these relationships.

- Make sure you have a Profile for each participant who completed the online Questionnaire by the deadline.
- **DO NOT** pass out the Profiles at this time.
- If you are delivering a virtual program, options and instructions for downloading profiles are given later in this guide.

Style in Action


Observations

Opinions



Kyle Lana AJ Abby

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 6

15 Minutes (Workbook, page 5)

INTRODUCE the video: Four individuals participate in a meeting to discuss a product that is missing a client's expectations.

ASK participants to write down their observations and opinions of each character on page 5 of the Participant Workbook.

PLAY Video Part 1.

DEBRIEF the video by asking participants to briefly share their thoughts on the characters. Many of the participants' comments will be subjective observations.

My Customer – First Impressions

Consider the customer you identified earlier. Give them a fictional name and write down:

- First impressions you had of that person (from your first interactions)

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5 Minutes (Workbook, page 6)

SAY Think about the customer you identified during our “Introduction” exercise.

SAY Give your customer a fictional name and then write down:

- First impressions you had of that person (from your first interactions).

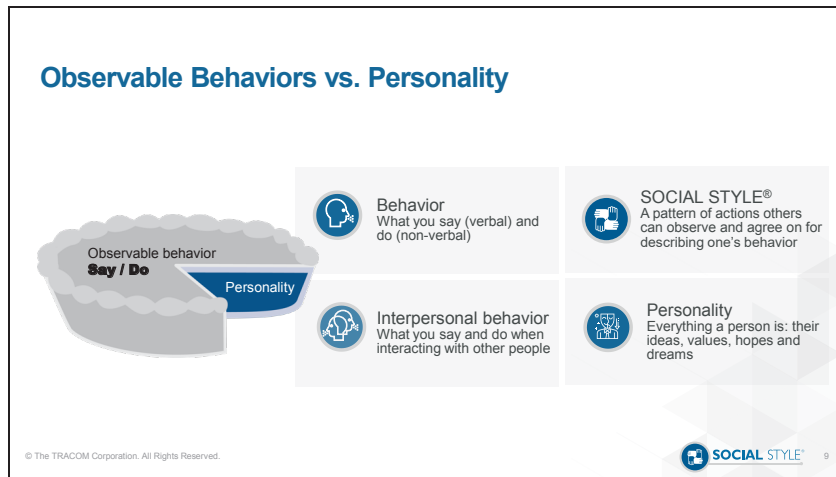
DEBRIEF the exercise by asking participants to briefly share the information about their customer.

SAY The information you shared is typical about how we feel about and react to others. Some information is objective and observable—and some of it is subjective (how we feel about them). Today, we’re going to show you a more objective and reliable way to understand behavior; then based on this, find ways to work more effectively and with less frustration.

Slide 8



SAY We're going to talk about behavior and how to accurately observe people's behavior.



4 Minutes (Workbook, page 7)

SAY Behavior and personality are not the same things. Observable behavior is like the crust of a pie. Personality is like the inside and outside of the pie.

ASK What makes up personality?

CONDUCT a quick facilitated discussion to solicit participants' responses. They should say things such as:

- Values, hopes, attitudes, beliefs.
- Things that are not necessarily observable.
- These internal qualities are more subjective in nature.

SAY Style is like the crust, because it's on the outside and observable. By observing behavior, we can find ways to define and discuss what we see. Then, we can begin to understand how this behavior affects ourselves and others.

Say & Do Behaviors

Traits	Observable Behavior		Judgments
Honest	Quiet	Loud	I like him
Intelligent	Slower-paced	Faster-paced	He annoys me
Arrogant	Facially controlled	Facially animated	She interests me
Motivated	Less-inflected voice	More-inflected voice	He irritates me
Self-centered	Less eye contact	More eye contact	I distrust her
Sincere	Casual posture	Rigid posture	I hate him
Critical	Leans back	Leans forward	I trust him

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5 Minutes (Workbook, page 8)

SAY When we first meet people, we often form immediate impressions, even after just a few seconds. This is subconscious (below our level of awareness) and happens immediately.

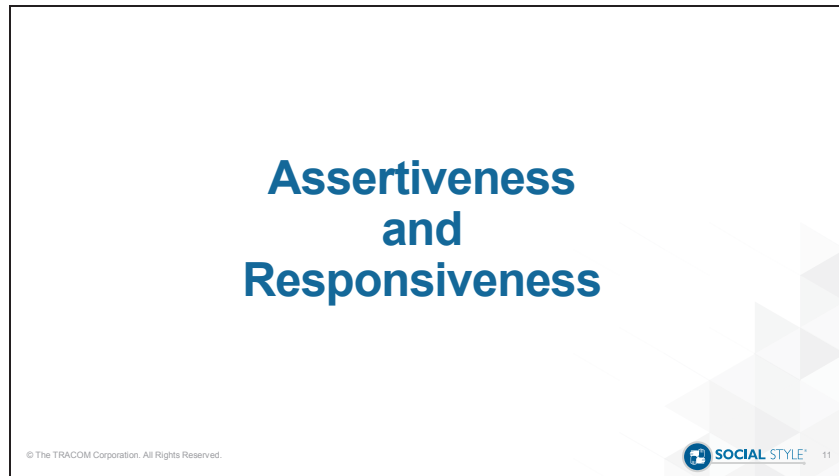
DESCRIBE

- Traits Column: What we think we know about a person, based on interactions; subjective opinions.
- Judgments Column: Our reactions to others; conclusions or evaluations we make, based on our subjective opinions.
- Observable Behavior Column: Things others “Say and Do”; more objective and observable behaviors.

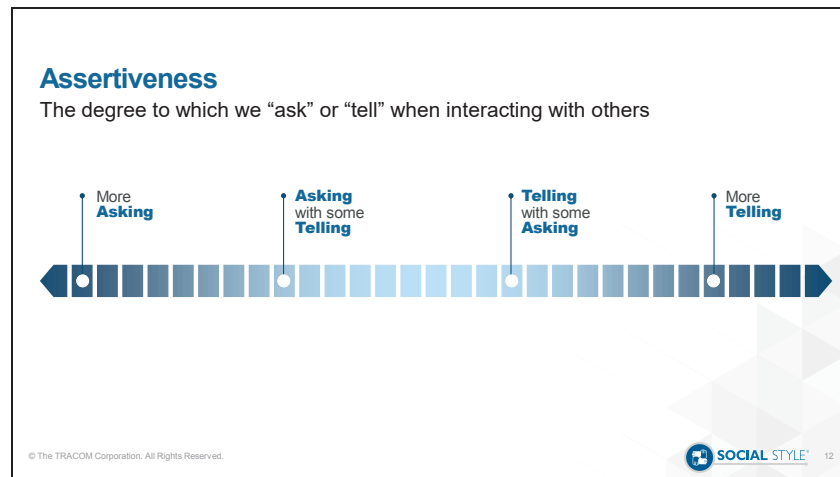
SAY Traits and Judgments are most subjective in nature and contain positive or negative descriptions.

Observable Behavior is objective and contains no positive or negative value.

Observable Behavior is an important tool for assessing others’ Styles. By focusing on Observable Behavior, you gain objectivity, which is critical for understanding people’s Styles.



SAY We measure observable behavior on two dimensions: Assertiveness and Responsiveness



2 Minutes (Workbook, page 9)

SAY To become more effective with others, we follow a behavioral model. There are two dimensions of behavior that define SOCIAL STYLE: Assertiveness and Responsiveness.

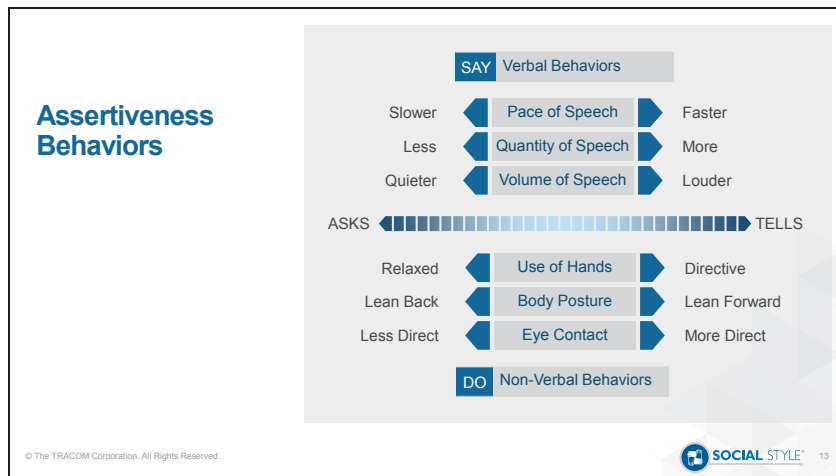
Assertiveness is the degree to which we ask or tell when interacting with others. The two anchors for Assertiveness are **Ask** on the left side of the continuum and **Tell** on the right side of the continuum.

Assertiveness is a measurement of how we try to influence others to take action. If you are more “Tell” Assertive, you state your opinions directly. You tend to declare your viewpoints and try to direct the actions of others.

For example, if you want to have lunch with someone, you might say, “Let’s have lunch today!”

If you are more “Ask” Assertive, you tend to be more cautious and reserved about sharing your opinions. You attempt to influence others in a more quiet, low-key, questioning manner.

For example, if you want to have lunch with someone, you might say, “Would you like to have lunch with me today?”



3 Minutes (Workbook, page 10)

SAY The Assertiveness scale helps predict a person’s behavior because it represents a “theme” or typical pattern. There are verbal and non-verbal clues to indicate a person’s Assertiveness.





ASK participants for examples of verbal and non-verbal clues for Ask-Assertive and Tell-Assertive individuals.


DESCRIBE the verbal and non-verbal indicators of Assertiveness:

Verbal: Ask-Assertive individuals use a slower pace, less quantity (fewer words), and quieter volume. Tell-Assertive individuals use a faster pace, talk more, and a louder volume.

Non-Verbal: Ask-Assertive individuals show relaxed hands and gestures, lean back, and use less direct eye contact. Tell-Assertive individuals have a directive use of hands, lean forward, and use more direct eye contact.

Assertiveness Observations

<p>Verbal Clues</p> <hr style="border: 1px solid #0056b3; margin: 5px 0;"/> <p>Non-Verbal Clues</p>	 <p>Kyle</p>	 <p>Lana</p>	 <p>AJ</p>	 <p>Abby</p>
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10 Minutes (Workbook, page 11)

PLAY the same Video Part 1, again, now that participants have been introduced to Assertiveness.

ASK them to observe verbal and non-verbal “Say and Do” behaviors and record their observations on page 11 of their Participant Workbook.

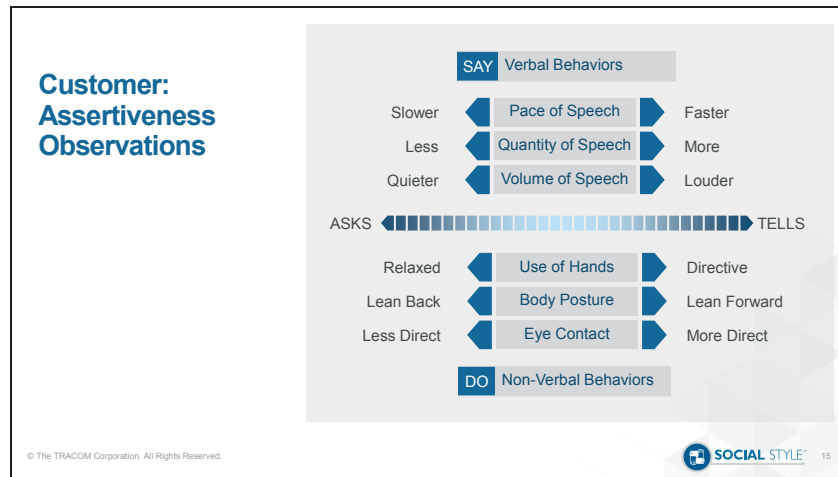
DISCUSS video characters related to Assertiveness.

ASK participants to share some subjective “Say and Do” verbal and non-verbal behaviors of each of the team members. Think about speech characteristics such as pace, quantity, and volume for verbal behaviors and use of hands, posture, and eye contact for non-verbal behaviors.

ASK What is different about your observations from the first time you saw the video? (Answer: They are much more objective.) This contrasts with the subjective observations participants made earlier.

ASK Based on your understanding of the Assertiveness dimension, where do you think each of the characters falls on the Assertiveness continuum?

SAY Assertiveness is neither positive nor negative; it is neutral. There is no good or bad place on the Assertiveness scale. Your level of Assertiveness only becomes positive or negative when used appropriately or inappropriately.



10 Minutes (Workbook, page 12)

SAY Using the customer that you identified earlier, think about, and then write down, that person's Assertiveness behaviors. Include the person's verbal and non-verbal behaviors. Think about their speech characteristics such as pace, quantity, and volume for verbal behaviors and use of hands, posture, and eye contact for non-verbal behaviors.

DEBRIEF the exercise by asking participants to briefly share the information about their customer's Ask or Tell Assertive behaviors.

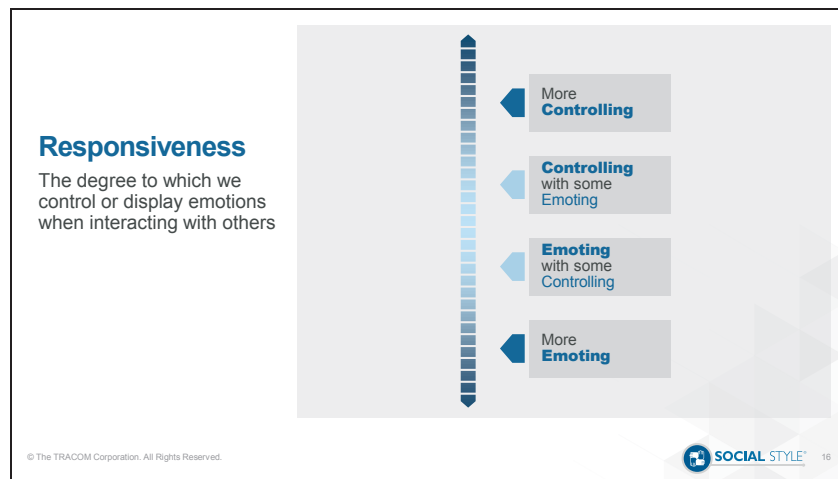
RECORD their information on a virtual white board or flip chart.

ASK What is different about your observations from the first time you described this person?

Answer: They are much more objective. This contrasts with the subjective observations participants made earlier.

ASK Based on your understanding of the Assertiveness dimension, where do you think your customer falls on the Assertiveness continuum?

EMPHASIZE that Assertiveness is neither positive nor negative; it is neutral. There is no good or bad place on the Assertiveness scale.



2 Minutes (Workbook, page 13)

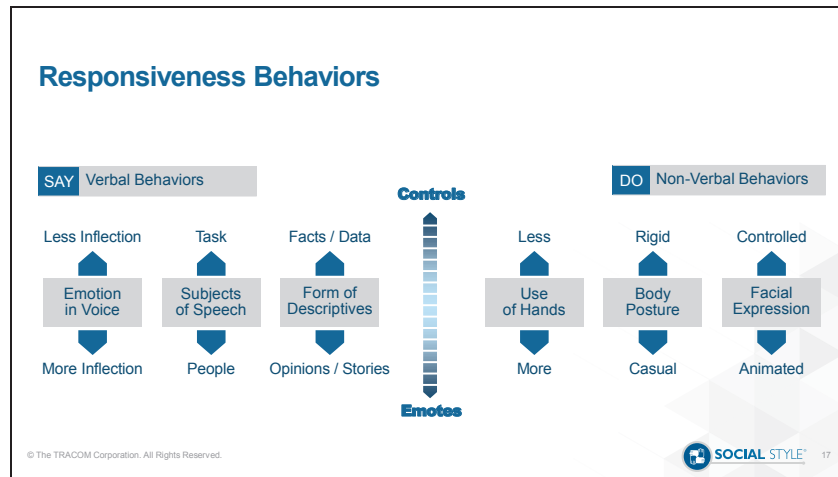
SAY Responsiveness is the degree to which people tend to control (don't outwardly display emotions) or emote (outwardly display emotions).

The two descriptive anchors for the Responsiveness scale are **Controls** on the top of the continuum and **Emotes** on the bottom of the continuum.

Responsiveness is also the extent to which you react to emotional appeals or displays.

If you control your emotions, you usually don't react to emotional appeals and are more likely to focus on ideas, data, and tasks. You are less likely to share your feelings publicly.

If you are more emoting, you share and display your emotions with others. You are more likely to respond to emotional appeals and displays from others.



3 Minutes (Workbook, page 14)

SAY The Responsiveness scale, like the Assertiveness scale, helps us to predict a person’s behavior because it is a “theme” or typical pattern.





ASK participants for their opinions on the verbal and non-verbal clues of Control- and Emote-oriented individuals.

DESCRIBE the verbal and non-verbal clues to responsive behavior as noted on the slide.


SAY Responsiveness is neither a positive nor a negative quality; it is neutral.

Assertiveness and Responsiveness do not affect each other — they are independent of each other.

Responsiveness Observations

Verbal Clues				
Non-Verbal Clues	Kyle	Lana	AJ	Abby

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 18

10 Minutes (Workbook, page 15)

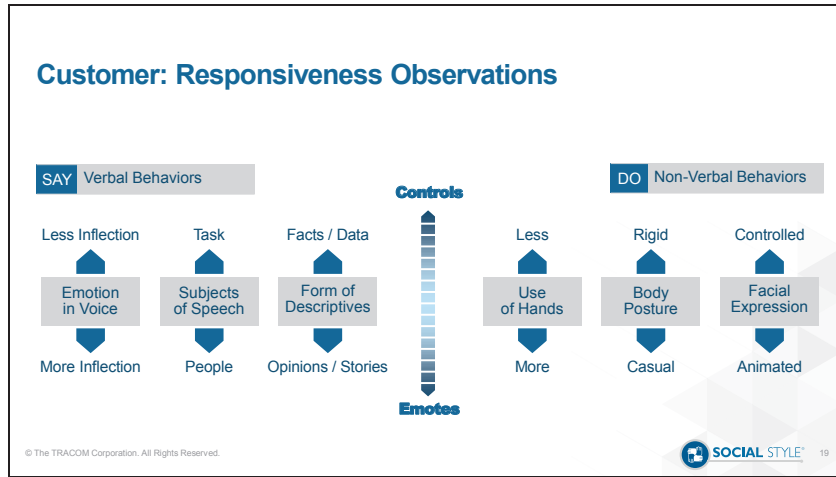
REPLAY Video Part 1 again, now that participants have been introduced to Responsiveness.

ASK participants to observe verbal and non-verbal Say/Do behaviors.

SAY Think about verbal clues such as vocal emotion, subjects, and what each team member describes. What did you observe? For non-verbal clues, think about use of hands, posture, and facial expressions.

ASK Based on your understanding of Responsiveness, where do you think each of the characters falls on the Responsiveness scale?

SAY The Assertiveness and Responsiveness dimensions assess behavior, not personality or intelligence, and they are independent of each other.



10 Minutes (Workbook, page 16)

SAY Using the customer that you identified earlier, think about, and then write down, that person’s Responsiveness behaviors. Include their verbal and non-verbal behaviors. Think about speech characteristics such as emotion in their voice, subjects of speech, forms of descriptors, and non-verbal behaviors such as use of hands, body posture, and use of facial expressions.

DEBRIEF the exercise by asking participants to briefly share the information about their customer’s Control or Emote Responsiveness Behaviors.

RECORD their information on a virtual white board or flip chart.

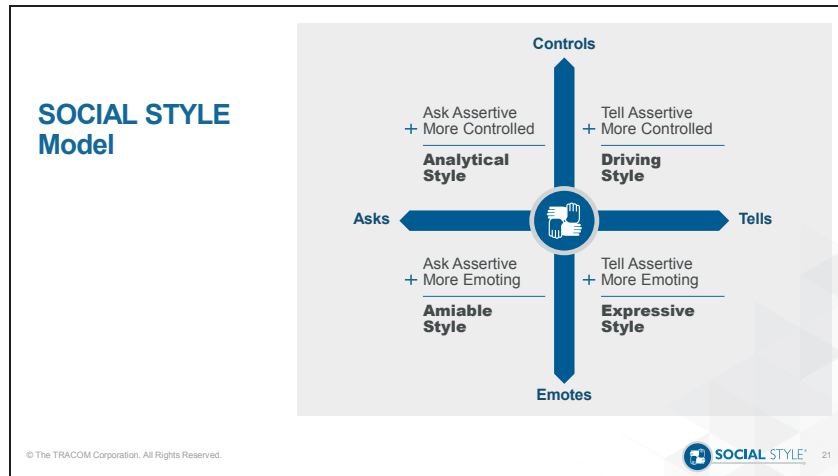
ASK What is different about your observations from the first time you described this person?

Answer: They are much more objective. This difference contrasts with the subjective observations participants made earlier.

ASK Based on your understanding of the Responsiveness Dimension, where do you think your customer falls on the Responsiveness continuum?



SAY Now that you understand Assertiveness and Responsiveness, we'll see how they form the SOCIAL STYLE Model.

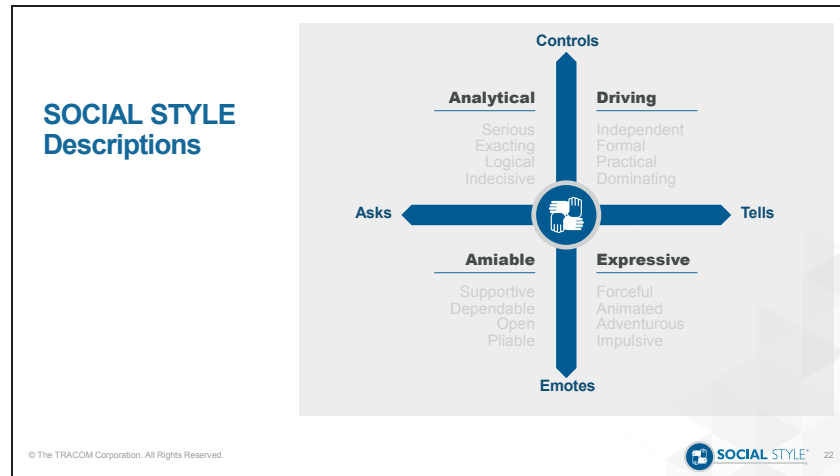


4 Minutes (Workbook, page 17)

CLICK TO REVEAL EACH QUADRANT

SAY By combining Assertiveness and Responsiveness, the four SOCIAL STYLEs are formed.

No individual will display one Style exclusively; but, in a short time, you can determine the patterns that define a person's Style. Once you know a person's Style, you can adjust your behavior to develop a more effective relationship.



5 Minutes (Workbook, page 18)

CLICK TO SPEAK ABOUT EACH QUADRANT (text becomes darker)

Review the summaries for each Style. Note that each Style contains positive descriptors and one negative descriptor. This illustrates the significance of perception. A Driving Style person might see themselves as Independent, Formal, and Practical, while others might perceive the same behavior as Dominating.


Solicit questions/ comments.

KEY POINTS:

- Style descriptions are generalizations about each Style.
- People with the same Style exhibit similar behaviors, but are still individuals.
- Perceptions can vary. What you see as strengths in yourself, others might view negatively.

Style in Action

What Style is each Character?



Kyle Lana AJ Abby

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SOCIAL STYLE 23

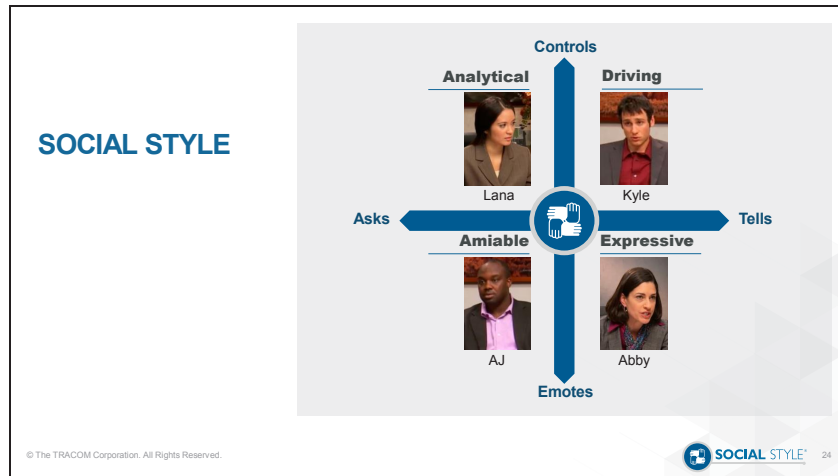
3 Minutes (Workbook, page 19)

REFERENCE the video characters from earlier exercises.

ASK What do you think the SOCIAL STYLE of each video character is?

DISCUSS the behaviors of the characters and how those are indicative of their Styles.

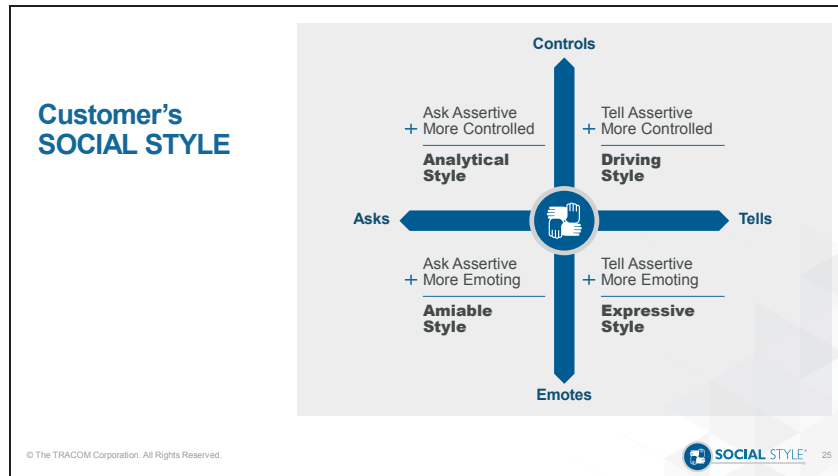
IMPORTANT: Do not advance the slide until you've discussed the behavior of each character. The next slide reveals each characters' Style.



2 Minutes (Workbook, page 19)

- Kyle – Driving
- Lana – Analytical
- AJ – Amiable
- Abby – Expressive

DISCUSS the behaviors of the characters and how those are indicative of their Styles.



5 Minutes (Workbook, page 20)

SAY Using the customer that you identified earlier, determine their Style. This is only a preliminary estimate. As we continue through the program, you might re-estimate the person's Style.

DEBRIEF the exercise by asking participants to share their customer's Style, and how this behavioral assessment relates to their initial impressions of the person (which may have been more subjective).

RECORD their information on a virtual white board or flip chart.

SAY You will use their Style as a framework for developing more effective interactions with this person.

Need, Orientation, and Growth Action

Need
The goal of each Style

Orientation
The common behavior used to achieve the need

Growth Action
Behavior that is rarely used by each Style. Using this behavior more often would increase this Style's effectiveness

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2 Minutes (Workbook, page 21)

SAY Remember that the Style descriptions are generalizations about each Style. While people with the same Style generally exhibit similar characteristics, each person is still unique.

SAY Each Style has a Need, an Orientation, and a Growth Action. By recognizing these things about each Style, we can understand their motivations and what drives their behavior.

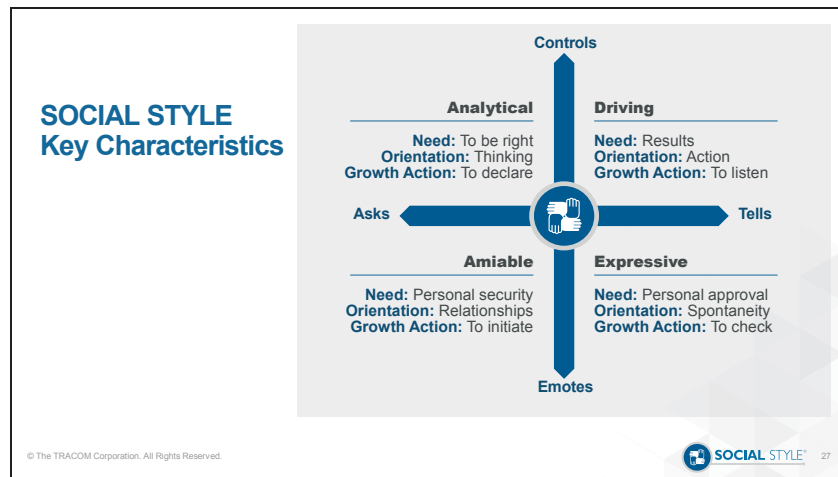
DEFINE:

Need – The goal of each Style.

Orientation – The common behavior used to achieve the need.

Growth Action – Behavior that is rarely used by each Style. Using this behavior more often would increase this Style's effectiveness.

SAY Understanding the need, orientation, and growth action of each Style will help you better relate to others' Styles and enhance your effectiveness with them.

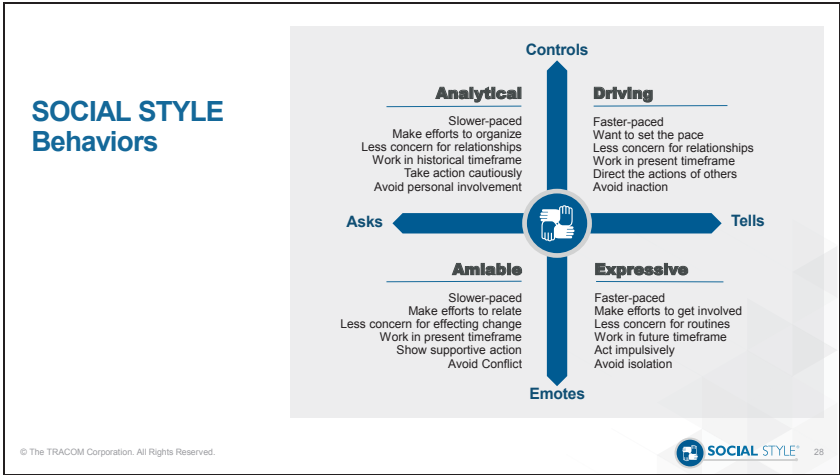


6 Minutes (Workbook, page 21)

CLICK TO REVEAL THE TEXT IN EACH QUADRANT.

REVIEW each Style.

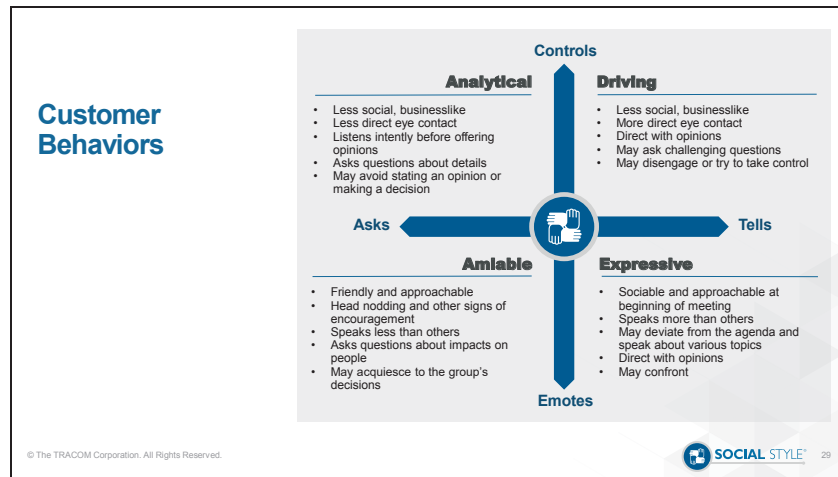
ASK How do need, orientation, and growth action manifest themselves in the video characters? Specifically, how does each team member’s behavior show their need, orientation, and growth action?



5 Minutes (Workbook, page 22)

CLICK TO SPEAK ABOUT EACH QUADRANT

DESCRIBE the typical behaviors of the four SOCIAL STYLES. These behaviors are related to the Style needs, orientations, and growth actions.

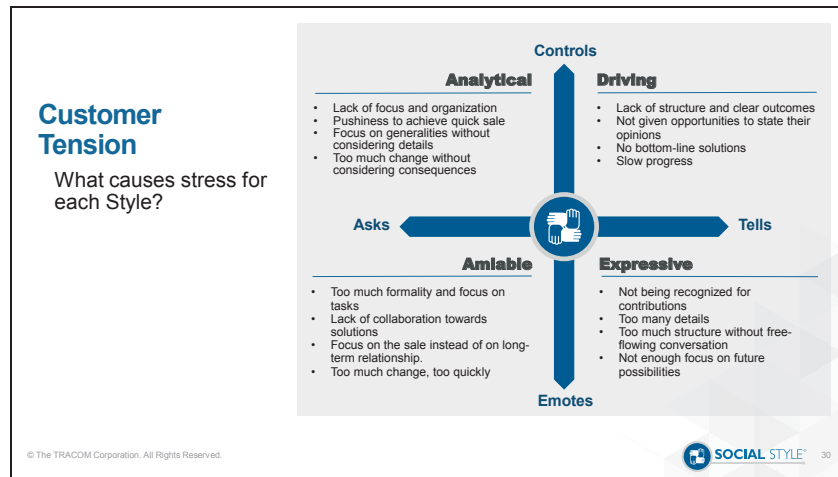


4 Minutes (Workbook, page 23)

CLICK TO REVEAL THE TEXT IN EACH QUADRANT.

REVIEW the customer behaviors. These behaviors are typical Style-related behaviors specific to working with customers.

ENCOURAGE participants to share stories about their customers.



6 Minutes (Workbook, page 24)

ASK Given a customer’s Style need and typical behaviors, what will cause stress for them?

FACILITATE a discussion of each Style before revealing the text.

CLICK TO REVEAL THE TEXT IN EACH QUADRANT.

The Driving Style need is results, so what’s going to raise their tension in a sales meeting?

- Lack of focus; disorganization; not being allowed to state their opinions; no bottom-line solutions; progress is too slow.

Expressive Style stressors:

- Not being recognized; too many details; too much structure without free-flowing conversation; not enough focus on future possibilities.

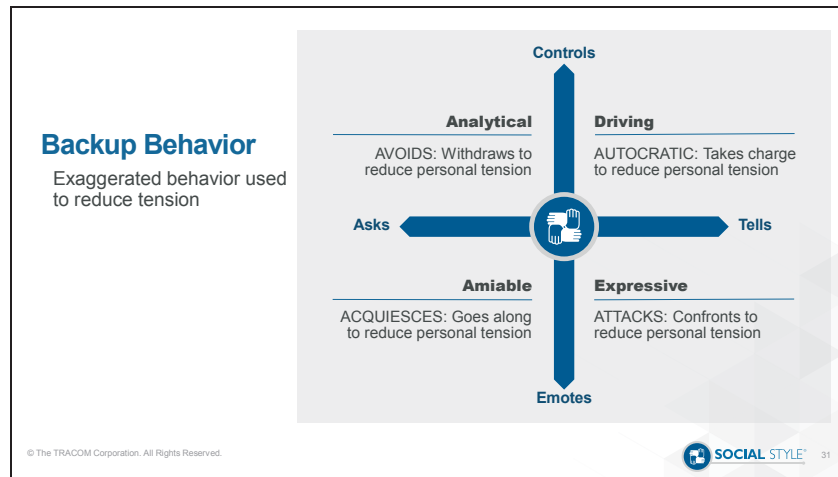
Amiable Style stressors:

- Too much formality; lack of collaboration towards solutions; focus on the sale instead of on long-term relationship; too much change too quickly.

Analytical Style stressors:

- Lack of structure and clear outcomes; pushiness to achieve quick sale; focus on generalities without considering details; too much change without considering consequences.

ENCOURAGE participants to share stories about their customers.



5 Minutes (Workbook, page 25)

CLICK TO REVEAL THE TEXT IN EACH QUADRANT.

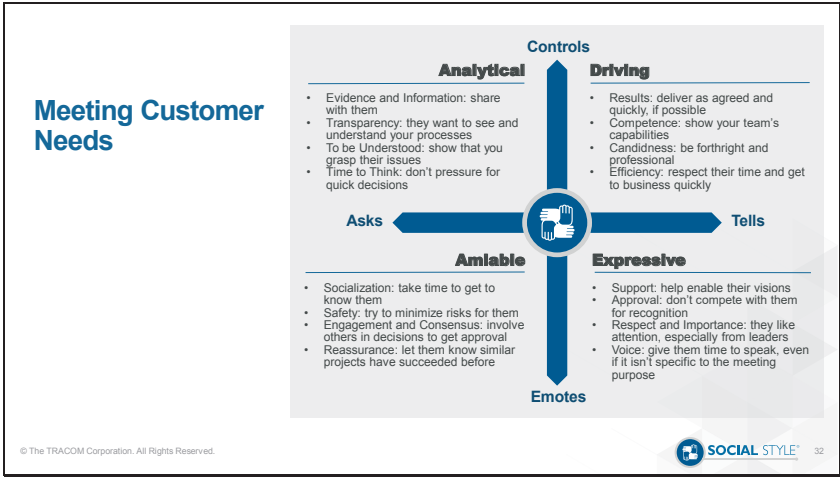
SAY When customers are feeling stressed, their behavior can be categorized: each Style falls into a type of extreme backup behavior to try and reduce tension.

DESCRIBE each Style's backup behavior. Remember, each Style's goal is to get their Style need met.

ASK What are some common ways that each Style might show their backup behavior?

- Driving: Will get frustrated by slow progress or barriers and try to take control of the situation.
- Expressive: Will get upset if they aren't given opportunities to express themselves or show their contributions, and might verbally confront others.
- Amiable: If they feel that a relationship is being threatened, they will stay quiet and acquiesce instead of firmly stating their opinions.
- Analytical: If they feel that things are moving too fast without taking into account important details, they will withdraw and refuse to contribute.

SAY Next we'll talk about some specific strategies for working with customers.



8 Minutes (Workbook, page 26)

ASK With these backup behaviors in mind, and understanding what causes stress for each Style, what are some ways to meet your customers' needs? Start with the Driving Style, what ideas do you have?

CLICK TO REVEAL THE TEXT IN EACH QUADRANT.

REVIEW the needs and strategies to meet each Style's needs and facilitate discussion of each Style.

ENCOURAGE participants to share stories about their customers.



10 Minutes (whole section on Observing Style Virtually)

SAY Working with customers and trying to sell remotely has its own unique challenges. You can still use Style to your advantage. Let's briefly see how people of different Styles might communicate using text messages.

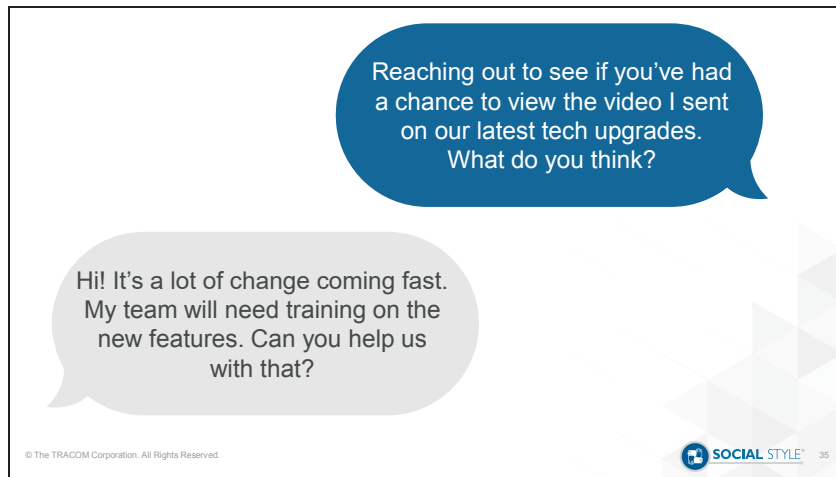


The following five slides are examples of “observable” behavior in text messages.

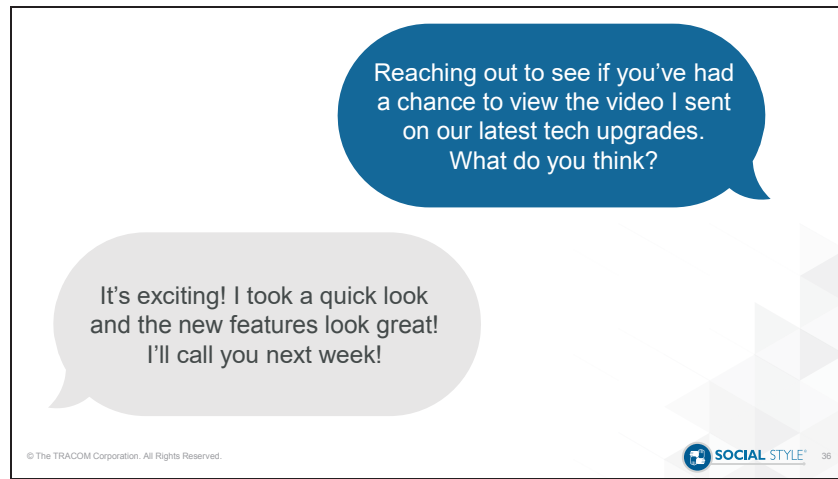
SAY By observing the behaviors of others, even through simple communication like texting, we can TRY to determine how people prefer to communicate and prefer to be communicated with.

Review example slides:

There is a lot of change happening at our organization, so I sent this text to four of my customers. Then I waited for their responses.



SAY Here is the first response from a customer.



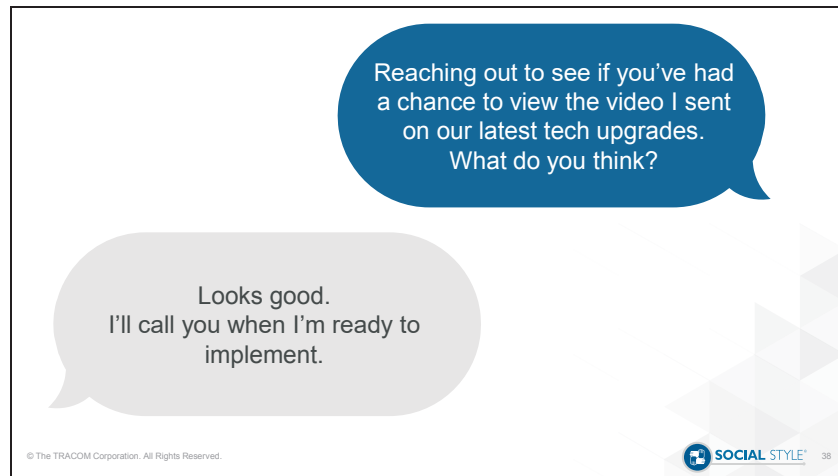
SAY This is the second response from another customer.

Reaching out to see if you've had a chance to view the video I sent on our latest tech upgrades. What do you think?

I think the new upgrades will help us be more efficient and save some effort. However, before we adapt the new release, we'll need to plan for my team to be trained. Do you have a process in place for this?

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SAY Here's the response from a third customer.



SAY And finally, this response from a fourth customer.

Keep these texts in mind as we'll be revisiting them later.

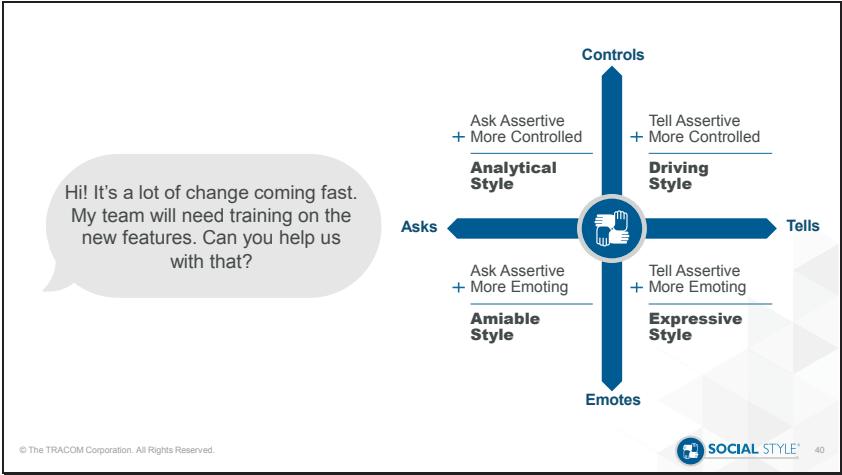
Name that Style!

Reaching out to see if you've had a chance to view the video I sent on our latest tech upgrades. What do you think?

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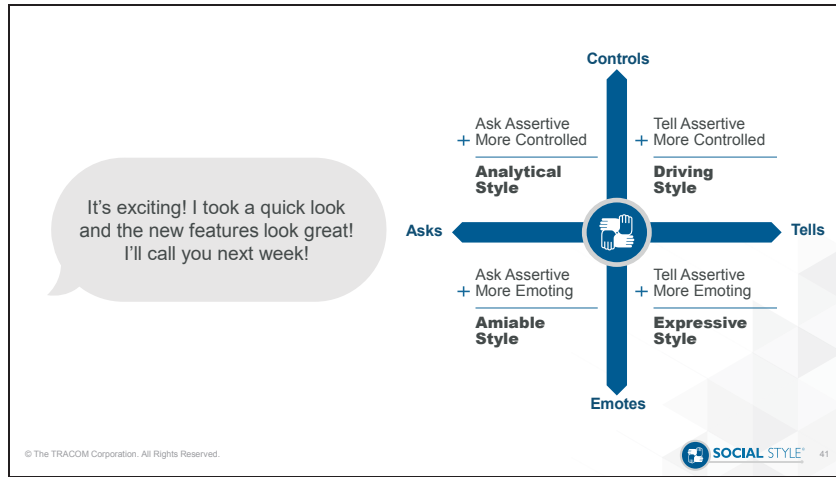
SAY This is the text I first sent out. How about the responses I received? Knowing what you know so far about SOCIAL STYLE, can you guess which Style each response is from?



SAY Which Style might this person be?

AMIABLE

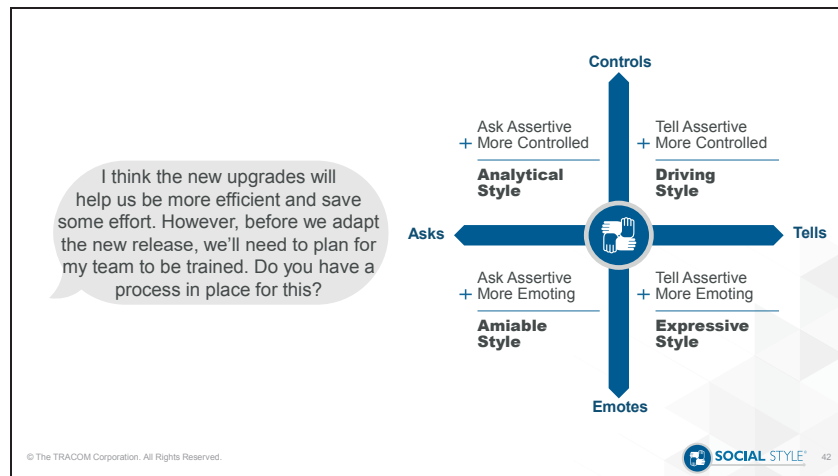
SAY This person is personable (“Hi!”) and concerned that things are moving fast. They are showing concern for the team’s ability to adapt the new technology, and they specifically ask for help. It indicates Ask Assertiveness and Emote Responsiveness.



ASK How about this one—what Style?

EXPRESSIVE

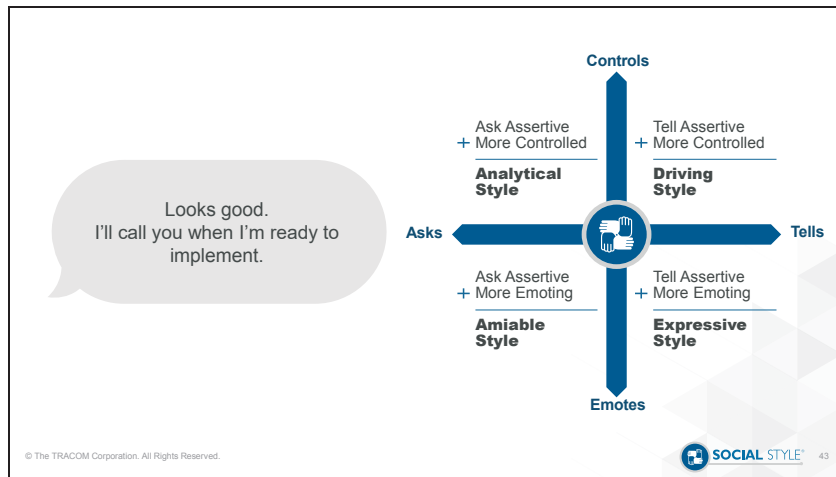
SAY This person uses a lot of exclamation marks to show enthusiasm and wants to interact. They also mention “I took a quick look,” indicating they didn’t pay close attention to the video or details. It indicates Tell Assertiveness and Emote Responsiveness.



ASK Which Style might this person be?

ANALYTICAL

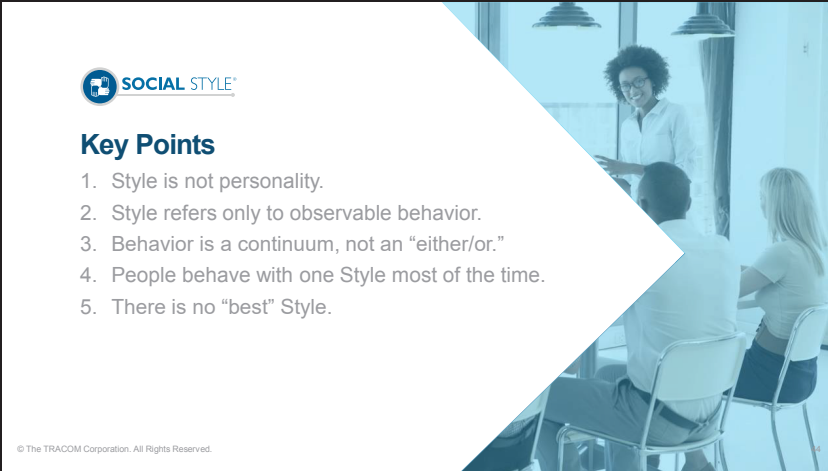
SAY This person likes things to be efficient but is hesitant to adapt the new technology until the team is trained and ready. They also ask a clarifying question – “Do you have a process in place for this?” It indicates Ask Assertiveness and Control Responsiveness.



ASK And finally, what Style might this be?

DRIVING

SAY This person is being direct and brief. They also communicate that they will initiate contact when they're ready ("Don't call me, I'll call you."). It indicates Tell Assertiveness and Control Responsiveness.



SOCIAL STYLE

Key Points

1. Style is not personality.
2. Style refers only to observable behavior.
3. Behavior is a continuum, not an “either/or.”
4. People behave with one Style most of the time.
5. There is no “best” Style.

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2 Minutes (Workbook, page 28)

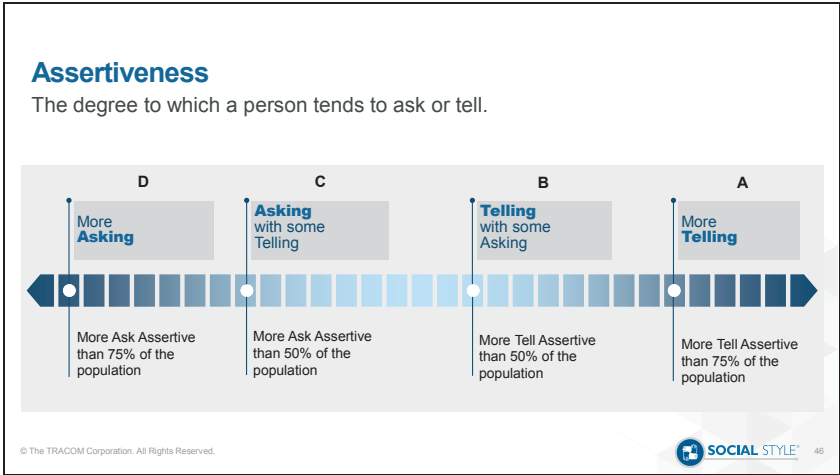
REVIEW the key points.

- Style is not personality.
- Style refers only to observable behavior.
- Behavior is a continuum, not an “either/or.”
- People behave with one Style most of the time.
- There is no “best” Style.

Slide 45



SAY Now that you're familiar with the Model, each of you will review your own SOCIAL STYLE Profile.

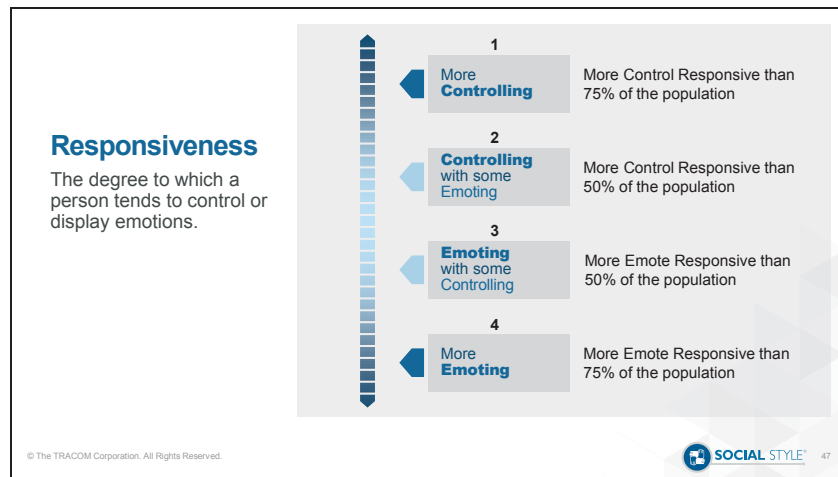


2 Minutes

SAY Before you read your SOCIAL STYLE Profile, let me describe how your results are determined. The dimensions of behavior are normed. This means that Assertiveness is reported in quartiles.

Review the information on the slide concerning percentiles of people in each of the four quartiles.

Slide 47



2 Minutes

SAY In the same way, Responsiveness is reported in quartiles.

Review the information on the slide concerning percentiles of people in each of the four quartiles.

Slide 48

**20 Minutes**

REVIEW the Profile pages on the following slides so participants understand the layout of the profile. After you've reviewed the slides, distribute individuals' profiles.

If delivering a virtual program, participants will have already received their profiles. Note that you are only covering the SOCIAL STYLE section of the profile; the Versatility profile will be reviewed later.

PROVIDE ample time for participants to read and absorb their profiles. Do not continue until it is evident that all participants have finished reading their profiles.

ASK if there are any questions, surprises, or concerns.

ASK If your self-perception results were different, what might have caused the difference in views?

EXPLAIN TRACOM's research shows that over 50% of the time, people see themselves differently from how others see them. Reiterate that there is no "best Style" and all Styles can be successful salespeople. Offer to be available during the break to answer individual questions or concerns.

NOTE: It is recommended that you take a break here and make yourself available for one-on-one conversations as participants may have questions or concerns they do not want to discuss publicly.

Report Prepared for: [Blank] Report Date: 11 Sep 2021

Introduction

SOCIAL STYLE® is a model for understanding people's behavior or styles. This awareness helps people to interact more effectively with one another. Our Style is determined by observable "top and tail" behavioral habits we develop over our lifetime. Once you understand a person's typical behavior you can predict how they might respond in the future, which helps you build better and more productive relationships. Treating others the way they want to be treated, or acting for their benefit, is a choice you control.

The model was created by TRACOM founders, Dr. David Merrill and Roger Reid, and is based on empirical research of behavior and performance. It was among the first psychological assessments to measure behavior instead of personality, and to use a multi-rater approach that measures co-worker perspectives instead of self-evaluations only. The SOCIAL STYLE Model® has been continuously refined since its discovery. Today, it is available in more than 20 languages and is used by thousands of organizations in over 100 countries.

SOCIAL STYLE® Multi-Rater Profile © The TRACOM Corporation

Report Prepared for: [Blank] Report Date: 11 Sep 2021

Your SOCIAL STYLE®

Driving B2

Others see you as behaving with a Driving Style, which may or may not be how you see yourself. Research shows that people's own perception of their SOCIAL STYLE is different from how others see them about 50 percent of the time. This corresponds with research showing it is common for people to have self-perceptions that are not in line with how others see us.

Read your Profile carefully and consider how it describes your behavior. While every statement may not reflect you perfectly, there is a home in your behavior that others agree on. In particular, you will learn:

- How others perceive your behavior and how you see yourself
- How you prefer to work, make decisions, and act when under stress
- Your Style strengths and weaknesses, and how they affect others
- The key characteristics of the other three Styles and what they value

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Continue reviewing.

More About the Driving Style

To better understand your SOCIAL STYLE, you need to gain insight into what shapes your behavior. The following helps you understand why you behave in the way you do, and how others see you. It provides insight into how you prefer to do things, as well as the source of your Style's strengths and weaknesses.

Style Need: Results

A Style need is the underlying motivator for each Style and what drives their behavior at work. Driving Style people believe their key contribution to business success is their determination to always meet financial and performance goals. The business that setting and achieving financial goals leads to focus and accountability.

Orientation: Action

People meet their need through a common set of behaviors. Driving Style people put significant effort into making things happen and pushing for results.

Growth Action: To Listen

Driving Style people are so concerned about achieving results that they will prioritize taking immediate action over other things, such as making certain they have all the necessary information to make decisions or listening to others' opinions. Their growth action is to more closely listen.

Resilient Behavior: Autocratic

When Driving Style people are feeling tension because results aren't being achieved quickly enough, they will try to take control of the situation rather than allow others to make decisions or be in charge.

These are core elements underlying your SOCIAL STYLE. As you read about your Driving Style in the rest of this report, you'll see how these elements are reflected in your interactions with others.

Driving Style In-Depth

Driving Style People

Driving Style people appear to know what they want and will openly express their opinions. They are goal-oriented and desire to get things done quickly. They often initiate projects or plans and help move ideas forward. Driving Style people

- Are focused on achieving their goals
- Are direct with others, which helps others to be clear on goals and outcomes
- Are formal and faster paced, which can create a busy and productive environment
- Focus on the present, encouraging others to deal with current problems and opportunities
- Often appear to make change by getting others and challenging the status quo
- Are comfortable with obstacles, wanting to reach outcomes that have a high probability of success

Driving Style 82

Relative to Driving Style 82 itself, you are less likely to influence others through "soft" statements, using more questions, and more likely to share your opinions verbally and in writing. Others see you as:

- Confident, authoritative and willing to get things done
- Efficient and personable, helping others stay focused and engaged
- Willing to take charge when work needs to be done or a project needs direction
- Sometimes authoritarian and overbearing toward others
- More interested in achieving results than getting personal recognition
- Sometimes taking your approach to be best and discouraging input from others

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Continue reviewing.

Report Prepared For: **Monica Roberts** Report Date: **12 Jun 2021**

Style in Action

Each Style prefers to use time, make decisions, and respond to stress in their own ways. This section describes each of these for your Style.

How You Prefer to Use Time

You:

- Let to use time efficiently because you value meeting program-based goals
- Focus on time to ensure quality and ensure your completion on achieving results
- Want to contribute to the team's success through your decision action and resulting results
- Are faster to accomplish objectives, even if there's risk of missing quality without considering all information or perspectives

How You Prefer to Make Decisions

You:

- Evaluate options and have decisions on information that is factual and practical
- Make decisions quickly based on immediate concerns and how the decision advances your goals
- Are willing to take risks, especially if there is a good probability of success
- Will make decisions independently, sometimes ignoring important information or alternative perspectives

When Under Stress or Tension

You:

- Will take over projects and situations when you think progress is too slow and other efforts to influence the outcome have failed
- Will take over projects by being forceful, clearly expressing your determination and setting others aside
- Will shift into action without listening to others, limiting your understanding of issues
- Will end conflicts quickly as long as there is agreement on a plan to move forward

Report Prepared For: **Monica Roberts** Report Date: **12 Jun 2021**

Strengths and Weaknesses

Your Style has unique strengths and weaknesses, or areas where you could adjust your behavior for different situations and needs. While it can be difficult to accept information about weaknesses, it is important to be aware of how others see your behavior in order to improve.

Your Style Strengths

You:

- Move things forward by being energetic, helping norms meet goals and deadlines
- Have your engagements or role, which helps lead to objective decisions
- Can effectively organize work, which helps others direct their activities
- Can complete work independently, helping to advance work without consulting others' time
- Thrive on competition, which can inspire others to contribute

How Your Strengths Affect Others

They:

- May become organized and efficient
- Create an environment where people get things done
- Inspire commitment from others when you listen and consider their opinions
- Maximize productive attempts with tangible accomplishments
- Help others stay focused and productive

Your Style Weaknesses

You:

- Neglect others' needs because you're so focused on achieving your own goals
- Expect maximum effort from others when they may be unwell
- Are impatient to your need for results, leaving out others and not considering their input
- Can come across as unfriendly and critical
- Want control of situations and outcomes, which can result in micro-managing

How Your Weaknesses Affect Others

They:

- Feel frustrated when you try to exert too much control
- Can make people feel like decisions are imposed upon them
- Decrease your effectiveness when you don't listen to others
- Enter into support from others when you don't take time to get to know them
- Can believe that conflict is resolved when others are still upset

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Continue reviewing.

Report Prepared for: Florida Institute Report Date: 12 Apr 2021

Understanding the Other Styles

This section describes the key characteristics of the other three Styles and what they value.

Amiable Style

Key Characteristics

- Relationship oriented and concerned with harmony among co-workers
- Good team players who like to get things done by involving others
- Look for personal motives in how others act
- Avoid making decisions that might cause conflict or damage relationships
- Can be slow or reluctant to change

What They Value

- People who collaborate and offer recommendations before making decisions
- Colleagues who are friendly and personable
- Colleagues who are cooperative, not competitive
- Focus on collaboration to achieve goals
- Colleagues who value their input

Analytical Style

Key Characteristics

- Information oriented and concerned with facts, logic and consistency
- See the big picture (overall) who work systematically
- Don't typically step in to coordinate and will take time to get things right
- Can appear detached and aloof
- Can be reluctant to declare an opinion or make decisions

What They Value

- A steady, unshakable pace to gather and evaluate all information before making decisions
- People who listen closely and pay attention to details
- Colleagues who are cooperative, not competitive
- Processes that are organized and logical
- Colleagues who are patient with their processes

SOCIAL STYLE® Mark Bauer Profile © The TRACOM Corporation

Report Prepared for: Florida Institute Report Date: 12 Apr 2021

Key SOCIAL STYLE® Reminders

Your Style is the theme of your behavior

All of us behave along the range of both the Assertiveness and Responsiveness scales. Your Style is your "comfort zone," where you are seen as behaving most of the time.

Every Style has growth actions

Each Style has weaknesses - areas where we can adjust our behavior to help meet others' needs. This knowledge helps you understand others and work more effectively with them.

There is no best SOCIAL STYLE

Each Style can be effective, regardless of role or position. The purpose of learning about Style is to increase awareness and understand how you can be more effective when working with others.

Every Style can be successful

Research shows that people of all Styles can succeed in any field or industry. What matters is the level of personality that a person shows when working with others.

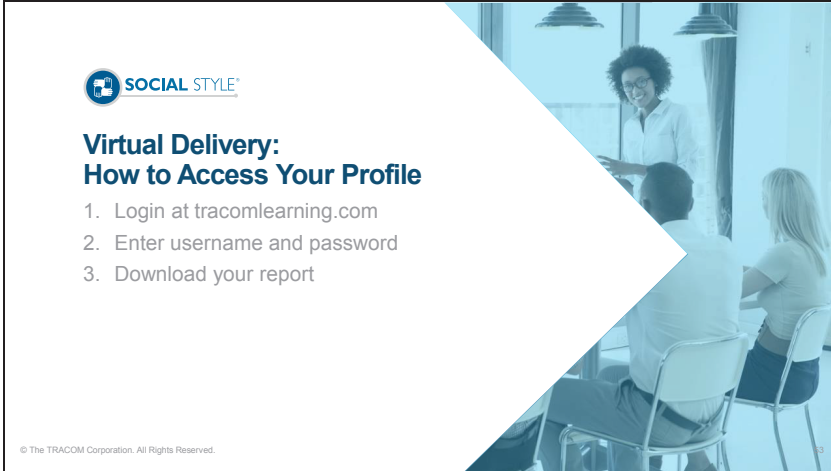
Style is about your behavior

The SOCIAL STYLE Profile describes the behavior you show to others, which is only one part of your personality. The profile does not describe your entire personality, which is unique to you.

SOCIAL STYLE® Mark Bauer Profile © The TRACOM Corporation

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Continue reviewing.



SOCIAL STYLE

**Virtual Delivery:
How to Access Your Profile**

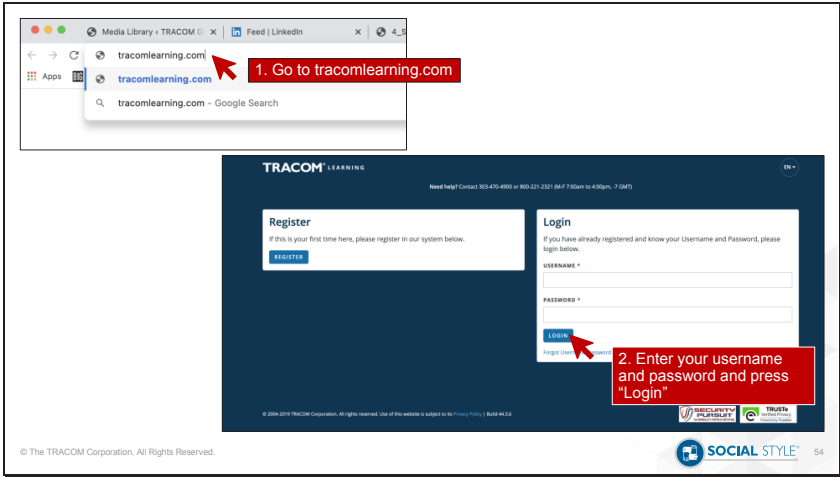
1. Login at tracomlearning.com
2. Enter username and password
3. Download your report

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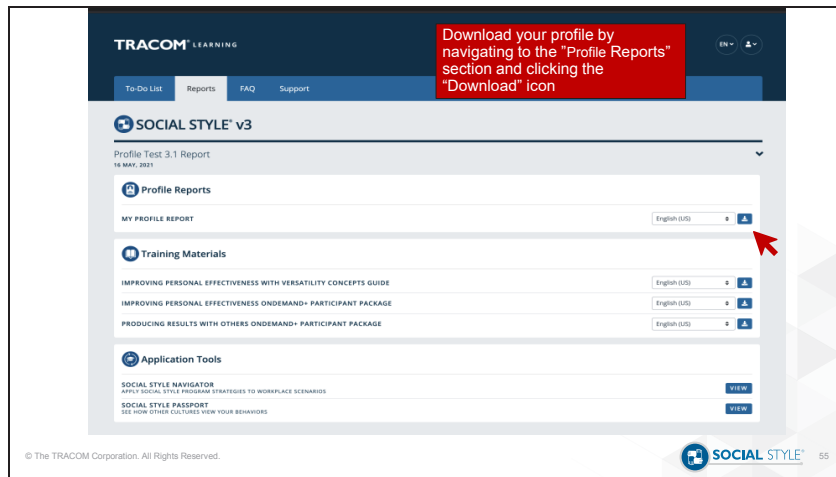
OPTIONAL: FOR VIRTUAL DELIVERY ONLY.

USE THE NEXT TWO SLIDES IF LEARNERS DOWNLOAD THEIR PROFILES DURING THE SESSION.

20 Minutes



SAY Login to tracomlearning.com. Use the same username and password as when you completed the assessment (survey).




SAY Your profile will be listed under “Profile Reports.” Click to download as a pdf.

Note: If the Learner selects the download button and the PDF does not open up (i.e., the screen just flashes), it is an indicator that their pop-up blockers are on. They need to allow pop-ups from tracomlearning.com and click the download button again. The profile report will open in a separate window. They can then save the profile report locally if they wish.

Know and Control Yourself

SOCIAL STYLE	My Style behaviors that frustrate customers of this Style	One thing I can do to control my Style behavior
Driving		
Expressive		
Amiable		
Analytical		

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10 Minutes (Workbook, page 29)

The purpose of this exercise is to help people begin to understand how some of their Style behavior can be challenging for customers and others. A later exercise will require learners to determine specific ways they can increase their Versatility towards people of other Styles.

SAY Each of us has behavior that frustrates others. Write down a brief list of your Style behaviors that frustrate customers of other Styles. Then, determine one specific thing you can do to control this behavior. Use the insights you discovered from your profiles to help.

ASK for volunteers to provide a sample of responses and write them on a flipchart. If delivering virtually, learners can chat some of their responses as a way of engaging the group.

SAY Next you will learn more about your own Versatility.

Know Others:
Techniques for Observing Style

- 1 Don't jump to conclusions
- 2 Remain objective
- 3 Separate Style behavior from someone's role or position
- 4 A moderate amount of stress can clarify someone's Style
- 5 Get out of the way (be an observer)

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SOCIAL STYLE 57

5 Minutes (Workbook, page 29)

SAY The more accurately we are able to observe our customers' Styles, the better we will be able to adapt our own behavior and "Do something for others" to increase Versatility.

DESCRIBE the best practices:

- Don't jump to conclusions about someone's Style
- Be an objective observer
- Separate Style behavior from someone's role or position
- A moderate amount of stress can clarify someone's Style
- Get out of the way (be an observer)

ASK if there are any questions.

Slide 58

**1 Minute**

SAY You now have a good understanding of Style. What you learned from your profile is going to be useful during the next section, where we learn about Versatility and how to adjust to the Style needs of others.

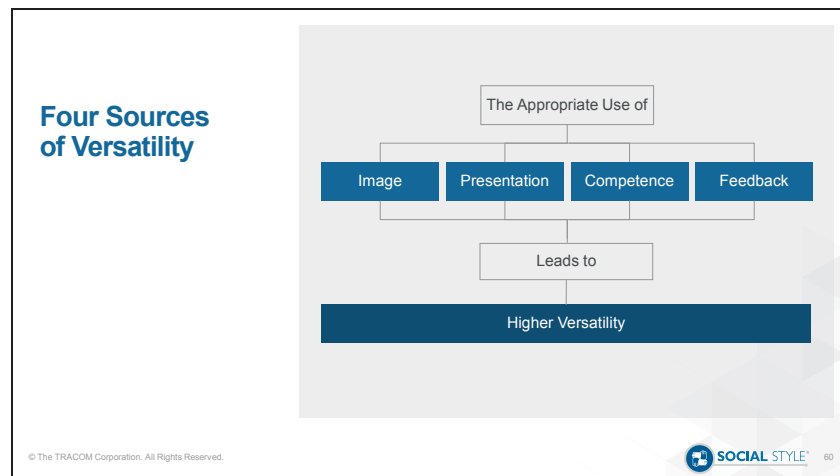


2 Minutes (Workbook, page 30)

SAY Versatility is a measure of your consistency in adjusting to the Style needs of others.

- At the beginning of the program, we reviewed some statistics on Versatility. Research has found that Style and Versatility significantly help salespeople's performance.
- Versatility is completely within your control, so it is your choice to be versatile with others. You can be highly versatile with one group and show low Versatility with another group. It depends on the circumstances and how much you value your interpersonal effectiveness with each group.
- It is completely independent of SOCIAL STYLE: Any Style can show Versatility and be successful.
- Versatility is NOT the same as likeability. A person can be well liked but not have high Versatility. The opposite can also be true. Versatility helps you develop better working relationships, but it is separate from your personal likeability.

Slide 60



6 Minutes (Workbook, page 31)

Image remains a part of the Versatility model because it's important for building relationships. Describe Versatility in a timeline:

SAY You show Versatility in four areas.

Image – When you first meet a new person at work, you form an impression about this person based on what you see, consciously or not. Essentially Image is a first impression: Are you dressed appropriately for the situation, for the work culture, for the client, and so on?

Note that **Image is not measured as part of your Profile**. This is because:

- Image is difficult to observe in virtual environments. We can't observe very well how people are dressed, and because there is a wide variety of dress codes, even within companies and teams, it is less relevant to measure Image in this way.
- Raters don't always like answering questions about people's Image without understanding the context of how Image is explained in training.
- Image is still important for many people and companies, which is why it's part of the model. However, you won't receive a measure of your Image.


Presentation – When a person communicates in meetings or other public venues, you'll notice how clear they are at helping people understand their points. Do they use clear language? Are their examples effective? Do they take others' Styles into account?

Competence – Over time, you'll observe this person in a variety of situations. Are they reliable and do they persevere during difficult times? Are they flexible when change happens? Are they optimistic most of the time? Do they show creativity?

Feedback – Finally, this is the most interpersonal part of Versatility. Are they a good listener? Do they show empathy for others' situations? Do they meet the needs of other people's Styles? Do they develop good relationships with others?


Versatility in Action

What did each person do to act with Versatility?
 What were their specific behaviors?



Kyle Lana AJ Abby

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12 Minutes (Workbook, page 32)

SAY We are now going to revisit our video characters in a continuation of their earlier meeting.

ASK participants to **take notes** in their participant workbooks on page 32 as they watch the video:

- What did each person do to act with Versatility?
- What were their specific behaviors?

PLAY the video, Part 2.

CONDUCT a debrief of the video, soliciting participants' responses to the above questions.

Slide 62

**1 Minute**

SAY Now you will learn about the Versatility Profile and will review your profile. There is a lot of information about Versatility—not only how you're perceived, but also simple strategies to adjust your behavior and increase Versatility.

This profile is a resource for you. You will use it for the Versatility exercises during the rest of the program.

Versatility
A measure of your consistency in adjusting to the Style needs of others

W	Not Consistent	X	Somewhat Consistent	Y	Usually Consistent	Z	Very Consistent
----------	----------------	----------	---------------------	----------	--------------------	----------	-----------------

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 63

2 Minutes

SAY We measure Versatility on a scale ranging from W to Z. These are normed quartiles, just like Assertiveness and Responsiveness.

When you aren't consistent in your behavior, you're usually focusing on your own Style needs. When you consistently show Versatility, you're focusing on meeting others' Style needs.

Your profile will show your results on this scale, ranging from W (not consistent) to Z (very consistent).

The Meaning of Versatility Positions

	1	2	3	4	5
	Strongly Disagree	Disagree	Partly Agree Partly Disagree	Agree	Strongly Agree
1. Approaches new situations with a positive outlook.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Builds good relationships with co-workers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Effectively presents ideas to groups.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Consistency

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3 Minutes

Before delivering Versatility profiles, explain the meaning of the positions.

SAY Before reviewing your results in more detail, let's put your results into context. This graph shows several sample items that measure Versatility.

You and your raters responded to these items using the scale ranging from 'strongly disagree' to 'strongly agree'. TRACOM assigns values to each of these scale points: 1 to 5. When rating Versatility, most people respond at the higher end of the rating scale. This makes sense since most people have at least some abilities in these areas. This means that the cutoff for achieving Z Versatility is very high, approximately 4.5 or higher.

Similarly, to score either an X or Y requires scores between 3.5 and 4.5. These are approximate values used for purposes of explanation.

Importantly, if you receive a W in any area of Versatility, this DOES NOT mean that your raters or yourself evaluated you at the low end of the rating scale. On the contrary, almost nobody scores at the lowest end – 1 or 2. For people with a W result, most of their ratings fluctuate between 2 and 4, resulting in an average score of slightly less than 3.5.

So, putting this into context, a W rating means that you are not showing as much consistency in these behaviors as you could. With effort and more consistency, your evaluation would improve.

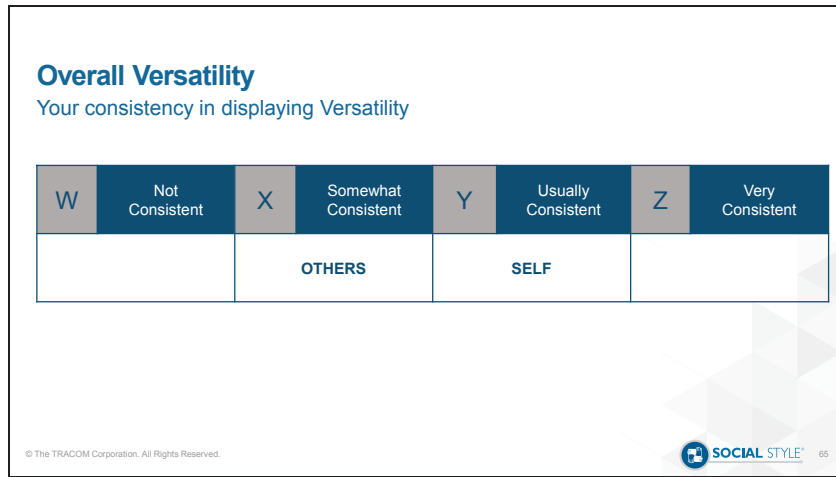
Set the context:

- W does not mean that you lack ability.
- It doesn't mean that your raters evaluated you at the lowest end of the rating scale.
- It doesn't mean they don't like you or don't think you're effective.
- It **does** mean that you're not highly consistent in your behavior; you do these things some of the time but could do them more often.
- It **does** mean that your raters evaluated you between 'disagree' and 'agree', on average.
- Note that these cutoff values (3.5 and 4.5) are only for demonstration – they aren't the exact values in TRACOM's norms, but they are close.

Giving the context is critical because it helps to ease people's automatic reactions to the profile.

Then:

- Help people focus on just one area to improve. This increases chances of success.
- What is 'low hanging fruit?' Something they can improve quickly.



2 Minutes

SAY Overall Versatility is a combination of your results in three areas: Presentation, Competence, and Feedback.

The “Others” position is the average of your raters’ evaluations. The “Self” position is where you evaluated yourself.

Like Assertiveness and Responsiveness, Versatility is normed in quartiles: W, X, Y, and Z.

Versatility is all about consistency of behavior.

A lower Versatility score does NOT mean you lack ability or that you never demonstrate these abilities.

What it DOES mean is that you aren’t showing consistency in your behavior.

By making small changes to your behavior and acting with more consistency, you can increase your Versatility. (Recall that the difference in values between W and Z are small but meaningful.)

Versatility in Detail
Your consistency in behaving with Versatility

Presentation: X						
W	Not Consistent	X	Somewhat Consistent	Y	Usually Consistent	Z
			OTHERS		SELF	

Competence: Y						
W	Not Consistent	X	Somewhat Consistent	Y	Usually Consistent	Z
				OTHERS		SELF

Feedback: X							
W	Not Consistent	X	Somewhat Consistent	Y	Usually Consistent	Z	
		OTHERS			SELF		

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2 Minutes

Each source of Versatility is explained the same as Overall Versatility – it is a measure of consistency of behavior.

Remember that Image is not measured because:

- Image is difficult to observe in virtual environments. We can't see very well how people are dressed, and because there is a wide variety of dress codes, even within companies and teams, it is less relevant to measure Image in this way.
- Raters don't always like answering questions about people's Image without understanding the context of how Image is explained in training.
- Image is still important for many people and companies, which is why it's part of the Model. However, you won't receive a measure of your Image.

Presentation – When a person communicates in meetings or other public venues, you'll notice how clear they are at helping people understand their points. Do they use clear language? Are their examples effective? Do they take others' Styles into account?

Competence – Over time, you'll observe this person in a variety of situations. Are they reliable and do they persevere during difficult times? Are they flexible when change happens? Are they optimistic most of the time? Do they show creativity?

Feedback – Finally, this is the most interpersonal part of Versatility. Are they a good listener? Do they show empathy for others' situations? Do they meet the needs of other people's Styles? Do they develop good relationships with others?

Slide 67



20 Minutes

Review the Profile pages so participants understand the layout of the Profile. After you've reviewed the profile, distribute individuals' profiles.

PROVIDE ample time for participants to read and absorb their reports. Do not continue until it is evident that all participants have finished reading their reports.

ASK if there are any questions, surprises, or concerns.

ASK If your self-perception results were different, what might have caused the difference in views?

NOTE: It is recommended that you take a break here and make yourself available for one-on-one conversations as participants may have questions or concerns they do not want to discuss with the entire class.

Overview of Versatility

The need for soft skills has been steadily rising in the modern workplace. Independent research has found:

- 50% of executives believe soft skills are equal to or more important than technical skills.
- Soft skill intensive jobs are expected to grow at 2.5 times the rate of other jobs.
- By 2030 soft skill intensive occupations are predicted to make up almost two thirds of all jobs.

Understanding your SOCIAL STYLE and becoming aware that other people may have different behavioral preferences is a good way to start building stronger relationships with others. To improve your performance, however, you need to improve your Versatility—the ability to adjust to the style needs of others. Versatility is a strong predictor of job performance, and is comparable to intelligence, education and generativity.

Similar to SOCIAL STYLE, many people do not have a firm understanding of their Versatility. In fact, research has shown that about two out of three people see their Versatility differently from how others see it. Therefore, it is critical to receive feedback on our ability to adjust our behavior to meet the needs of others. That is exactly the information your Versatility Profile provides.

Your Versatility Profile Feedback

The goal here is that your Versatility is within your control. You can increase your effectiveness by becoming aware of and acting on the insights that are provided on the following pages. This includes:

- A general description of high and low Versatility for your Style
- How other people view your Versatility
- Detailed interpretations of your level of Versatility in the areas of Presentation, Competence and Feedback
- Specific and actionable strategies designed to improve your Versatility

Versatility and the Driving Style

This section will help you understand what high and low Versatility look like for your Style. These are general descriptions and not based on your specific results, which are described in the next section.

High Versatility

When dealing with high Versatility, Driving Style people are able to keep projects moving ahead by moving input from others. They:

- Actively listen to others, recognizing their viewpoints and why they have them.
- Get to know others personally, helping to establish relationships and build consensus.
- Are engaged to how they share information and opinions, leading to higher trust.
- Encourage others to express their ideas and opinions.
- Make decisions that incorporate input from multiple sources, resulting in higher quality outcomes.
- Are patient, moving things forward without unnecessarily rushing.

Low Versatility

Low Versatility contains elements of Driving Style people's backup behavior (being defensive and/or pushy) when they listen. They:

- Listen superficially and come across as insensitive or uncaring.
- Are so focused on short-term concerns they don't recognize long-term consequences of their actions.
- Rush into decisions without considering all information or others' opinions.
- Try to control processes, people and outcomes.
- Try to minimize discussion and decisions, undermining support from others.
- Value authority as the expedient of other ways to approach issues, alienating people of other Styles.

Continue reviewing.

Report Prepared for: **Merritt Hobbie** Report Date: **12 Apr 2021**

Overall Versatility

Year Consistency in Displaying Versatility

W	Not Consistent	X	Somewhat Consistent	Y	Highly Consistent	Z	Very Consistent
	SELF			OTHERS			

Your Versatility as Described by Others: Z

Your results show you in the top quartile of versatility, meaning you frequently adjust your behavior to others' styles and needs, helping meet their priorities along with your own. While you're in the high versatility range, you can enhance your effectiveness even further by consistently adjusting your behavior to the requirements of the situation. Everyone has the ability to be more versatile, so simply require making an effort to adjust your behavior more frequently. Remember, it's normal to view ourselves differently from how others see our versatility.

A large part of increasing versatility is monitoring the impact you have on others. When you focus mostly on your needs, it can frustrate others and lead them to work around you. Instead of with you. People may try to accomplish objectives without involving you and this can weaken your effectiveness and influence within the team.

Read your Profile carefully and consider how to describe your versatility. While every statement may not describe you perfectly, there is a theme to your behavior that others can observe. The Ways to Improve section provides specific strategies to enhance your effectiveness in each source of versatility. You don't have to utilize every strategy; choose the ones that will have the greatest impact on your effectiveness. These strategies are specific to your Style, so you may notice common themes across different strategies. By using this advice, you will increase your versatility.

Versatility: Merritt Hobbie © The TRACOM Corporation

Report Prepared for: **Merritt Hobbie** Report Date: **12 Apr 2021**

Versatility in Detail

Presentation: Z

W	Not Consistent	X	Somewhat Consistent	Y	Highly Consistent	Z	Very Consistent
	SELF			OTHERS			

Competence: Z

W	Not Consistent	X	Somewhat Consistent	Y	Highly Consistent	Z	Very Consistent
	SELF			OTHERS			

Feedback: Z


W	Not Consistent	X	Somewhat Consistent	Y	Highly Consistent	Z	Very Consistent
	SELF			OTHERS			

Next Steps to Understanding Versatility

This section describes your results in Presentation, Competence and Feedback. For each area, there is an interpretation followed by Ways to Improve. The interpretation section identifies how your behavior is perceived by others and the effects your behavior can have on them. This is written specifically for your Style so you can understand how your versatility is related to your Style-based behaviors. It provides you with insights into how others benefit from, or are challenged by, your behaviors.

The Ways to Improve section provides specific strategies you can use to enhance your effectiveness in each source of versatility. You don't have to utilize every strategy; choose the ones that will have the greatest impact on your effectiveness. These strategies are also specific to your Style, so you may notice common themes across different strategies. By using this advice, you will increase your versatility.

© The TRACOM Corporation Versatility: Merritt Hobbie



Continue reviewing.

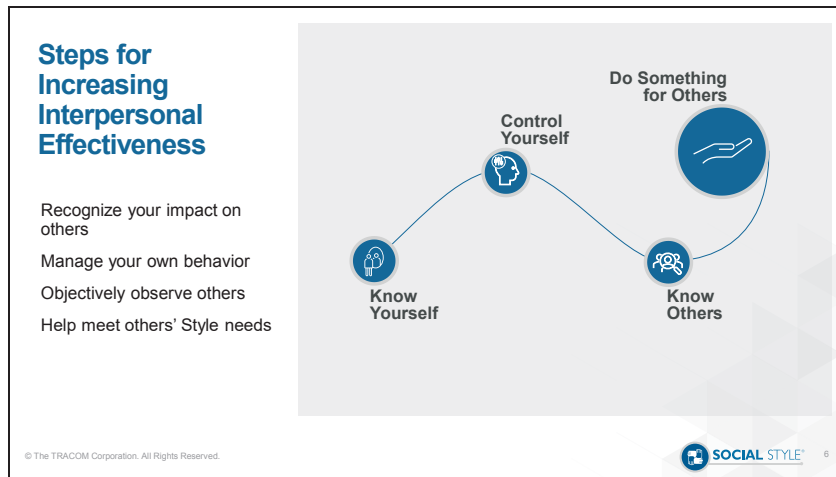
Presentation Report Date: 11 Apr 2021

Competence Report Date: 11 Apr 2021

Feedback Report Date: 11 Apr 2021

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Continue reviewing.



5 Minutes (Workbook, page 33)

SAY At the beginning of the program, we talked about the four steps for increasing interpersonal effectiveness. Now that you've reviewed your Versatility profiles, let's review these again as we think about ways to adjust behavior to increase Versatility.

REVIEW the four steps for increasing interpersonal effectiveness:

- 1. Know Yourself** by recognizing the impact your Style has on others.
- 2. Control Yourself** by managing your own Style behavior and being tolerant of others' Styles.
- 3. Know Others** by observing them more objectively.
- 4. Do Something For Others** by helping them meet their Style needs. This eases their tension and opens the door for them to act with Versatility towards you.

SAY To finish the program, we're going to focus on Doing Something for Others. You're going to create an action plan to increase Versatility with your customers. First, we'll review some strategies for showing Versatility towards each Style. This will give you important information for creating your action plan.

Preparing for Meetings

Style	DO	DON'T
Analytical	<ul style="list-style-type: none"> Share agenda beforehand Verify meeting detail is sufficient Be well-prepared 	<ul style="list-style-type: none"> Expect a lot of conversation Focus on personal relationships Be dismissive of their input
Driving	<ul style="list-style-type: none"> State expected outcomes Get their approval of the agenda Allow them control of meeting specifics 	<ul style="list-style-type: none"> Start late Be disorganized Block decisions unnecessarily
Amiable	<ul style="list-style-type: none"> Co-create the agenda Be early for socialization Enter with camera and mic on 	<ul style="list-style-type: none"> Assume interest because they agreed to meet Jump right to task in communications Involve others without letting them know beforehand
Expressive	<ul style="list-style-type: none"> Ask for their opinions on the agenda Acknowledge them immediately Have fun 	<ul style="list-style-type: none"> Provide too much detail in advance Recap the past in detail Too tightly structure the meeting

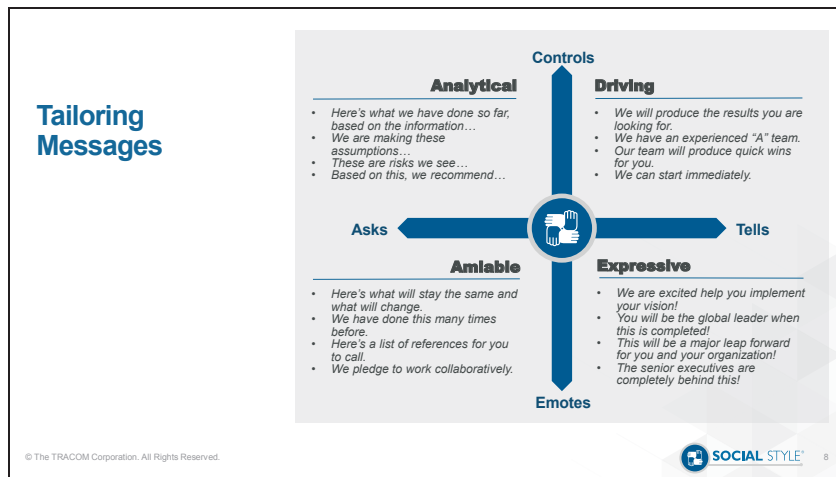
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6 Minutes (Workbook, page 34)

SAY Part of showing Versatility is recognizing customers’ needs and preparing ahead of time. Here are some meeting strategies for each Style.

CLICK TO REVEAL THE TEXT IN EACH QUADRANT.

REVIEW the do’s and don’ts when preparing for meetings.



6 Minutes (Workbook, page 35)

SAY Most of us fall into the habit of communicating with people in ways that are comfortable for us, without thinking of the needs of the customer. This is often because we're rushed and send out quick emails. Communicating in Style-specific ways is very important for meeting your customers' needs. Here are some simple strategies for tailoring your messages to each Style.

CLICK TO REVEAL THE TEXT IN EACH QUADRANT.

REVIEW the techniques for tailoring messages to each Style.

Using Versatility to earn Trust

Analytical	Driving
<ul style="list-style-type: none"> • Prove that you are capable • Show the logic behind proposals • Focus on quality • Prepare ahead and know their organization • Communicate the pros and cons • Let the personal relationship develop; don't push it 	<ul style="list-style-type: none"> • Show confidence in your abilities • Inform them if demands cannot be met • Be candid • Keep up with fast pace • Communicate your understanding of their desired results • Be efficient with their time
Amiable	Expressive
<ul style="list-style-type: none"> • Share personal information, as appropriate • Be genuine and sincere • Show your commitment to helping them • Empathize with their needs • Avoid unnecessary pressure • Remember the names of their key relationships 	<ul style="list-style-type: none"> • Have a casual, open approach • Don't unnecessarily conceal your feelings • Avoid challenging or competing with them • Show enthusiasm for their ideas and insights • Give them your undivided attention • Talk about non-work topics

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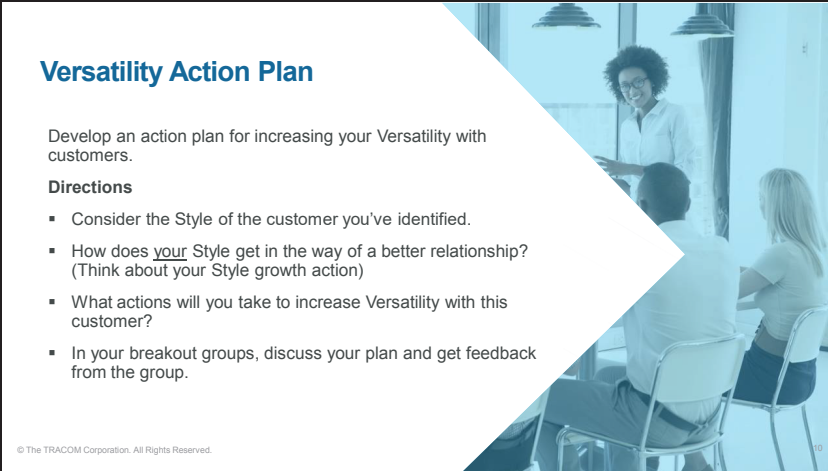
8 Minutes (Workbook, page 36)

ASK Given a customer's Style need, what are some ways to earn trust?

FACILITATE a discussion of each Style before revealing the text.

ASK What are some ways to earn trust from people of each Style? Think about their Style needs—what do they value from salespeople?

CLICK TO REVEAL THE TEXT IN EACH QUADRANT.



Versatility Action Plan

Develop an action plan for increasing your Versatility with customers.

Directions

- Consider the Style of the customer you've identified.
- How does your Style get in the way of a better relationship? (Think about your Style growth action)
- What actions will you take to increase Versatility with this customer?
- In your breakout groups, discuss your plan and get feedback from the group.

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30 Minutes (Workbook, page 37)

SAY Use the insights you've learned and create a specific plan for yourself. Writing down your intentions is a proven way of making sure you actually do something. Decide on just one or two things you can do differently.

Remember your Style growth actions, since managing your own Style behavior is an important part of being versatile.

REVIEW the Style growth actions:

- Driving: to listen
- Expressive: to check
- Amiable: to initiate
- Analytical: to declare

SAY When you've finished this, we will put you in small breakout groups to share your insights and give feedback to one another.

CREATE breakout groups of 2 to 3 people.

Slide 76



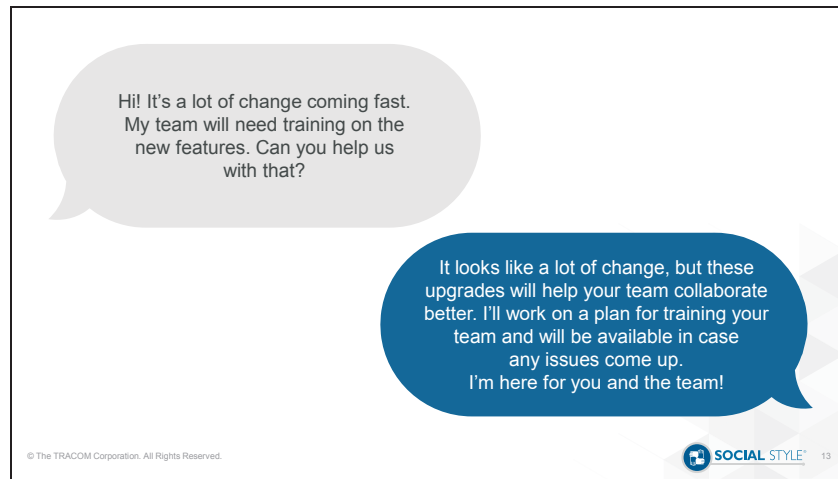
10 Minutes (whole section on Observing Versatility Virtually)

SAY Briefly, before we finish—remember those text messages we reviewed earlier? Let's bring Versatility into those conversations.



SAY We had four responses to this message. Let's look at how the person who sent this message might respond to each of these individuals. Is the person showing Versatility in each message?

Slide 78

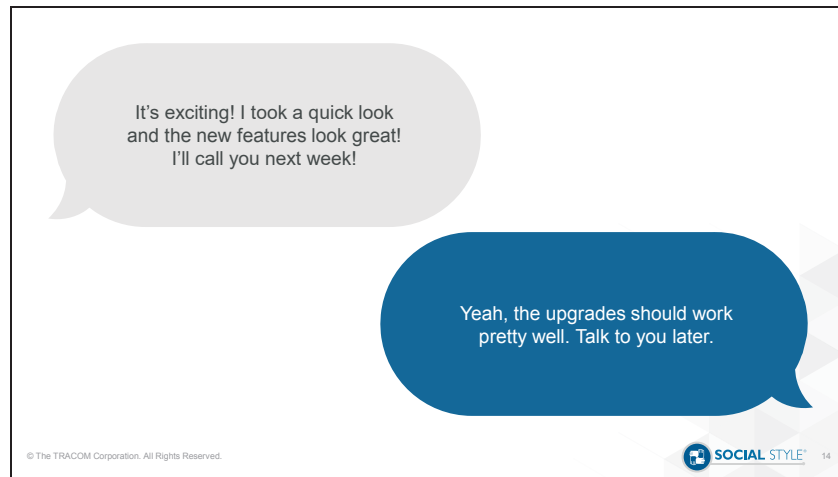


SAY This message came from the Amiable Style customer.

Click to reveal.

SAY And here is the response. What do you think? Is the salesperson showing Versatility toward the Amiable Style person? What would you add or change to the response?

NOTE: The salesperson is making an effort to meet the person's Style needs by reassuring them about the changes. The salesperson offers to help the customer by developing a training plan, then reassures them that they will be supported.



SAY This message came from the Expressive Style person.

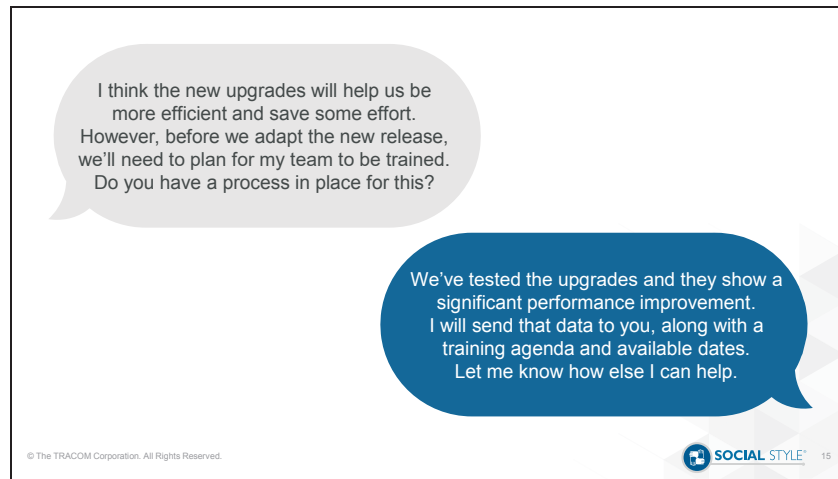
Click to reveal.

SAY And here is the response. What do you think? Is the salesperson showing Versatility toward the Expressive Style customer?

Is the response focused on their own needs, or the Expressive Style person's needs? What would be a more effective response?

NOTE: The salesperson is diminishing the customer's enthusiasm. A more effective response would be to reflect the enthusiasm by reiterating how great the new upgrades are and how excited the salesperson is about the changes, then offer to set up a call with the customer.

Slide 80

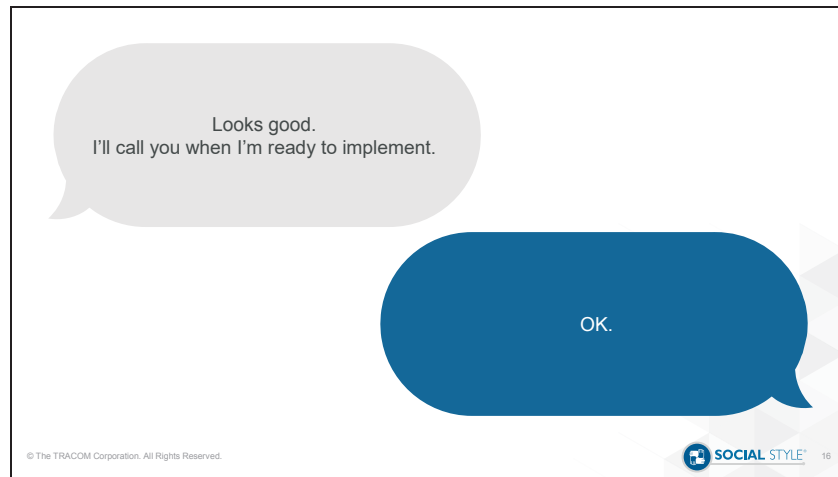


SAY This message came from the Analytical Style customer.

Click to reveal.

SAY And here is the response. What do you think? Is the salesperson showing Versatility toward the Analytical Style person? What would you add or change to the response?

NOTE: The salesperson is making an effort to meet the customer's Analytical Style needs by recognizing their need to prepare ahead of time by getting training. The salesperson offers to send more detailed information about the upgrades as an effort to give the customer more information and alleviate any remaining concerns. They also open the conversation to more input by offering to help in any other way.




SAY This message came from the Driving Style customer.


Click to reveal.

SAY And here is the response. What do you think? Is the salesperson showing Versatility toward the Driving Style customer?

Is the response focused on their own needs, or the Driving Style person's needs? What would be a more effective response?

NOTE: Though Driving Style people appreciate brevity, the salesperson is dismissive and is missing important elements of the customer's Style. The salesperson should recognize that the customer probably hasn't reviewed the upgrades in detail. The salesperson should state that they are there to help move forward, and also offer options to meet with the customer to discuss the changes and listen to their input.



 **SOCIAL STYLE**

Next Steps

1. Practice Versatility! Keep your Action Plan nearby for reference.
2. SOCIAL STYLE Navigator has advice on many sales situations, along with additional resources.
3. SOCIAL STYLE Passport allows you to see how you would profile in another country.

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5 Minutes (Workbook, page 38)


SHARE key “takeaways” with the class:

The key to more effective performance is to practice what you’ve learned. Keep your Versatility Action Plan nearby as a reminder. As you begin to experience positive results, this will reinforce your commitment to practice Versatility.

There are additional resources that will help you. TRACOM’s SOCIAL STYLE Navigator contains advice for working with customers in a variety of situations, such as giving presentations, advancing the sale, and having difficult conversations. You can access this resource by logging in at tracomlearning.com.

NOTE the following slides describe SOCIAL STYLE Navigator in more detail.

SOCIAL STYLE Navigator®



SOCIAL STYLE Estimator
A brief survey that estimates the Style of others

SOCIAL STYLE Advisor

- Prep for meetings, negotiations, presentations
- Style & Versatility best practices for many situations

eLearning Modules
Apply Style concepts to teams, managing conflict and coaching

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SOCIAL STYLE® 18

1 Minute

SAY You now have free and unlimited access to SOCIAL STYLE Navigator, the on-demand micro-learning tool that helps you apply Style and Versatility.

SOCIAL STYLE Navigator includes:

SOCIAL STYLE Estimator

The Estimator provides users with an interactive survey that evaluates observable behavior in others to determine their Style and helps you plan ahead for successful interactions.

SOCIAL STYLE Advisor

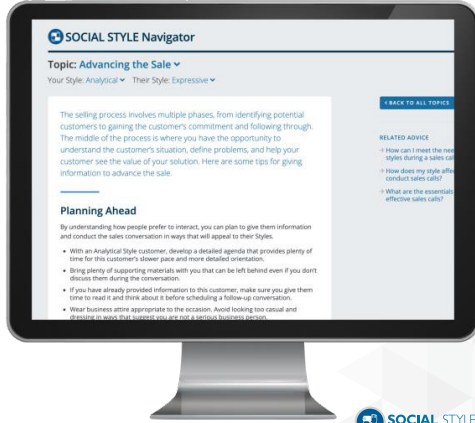
Use Advisor topics to prepare “just-in-time” for meetings, negotiations or sales presentations with advice on navigating Style and Versatility best practices to maximize high-performing relationships.

eLearning modules

Continue your learning journey via micro-learning that reinforces ways to apply SOCIAL STYLE and Versatility to Working in Teams, Coaching and Managing Conflict.

SOCIAL STYLE Navigator® Access

Available through
tracomlearning.com

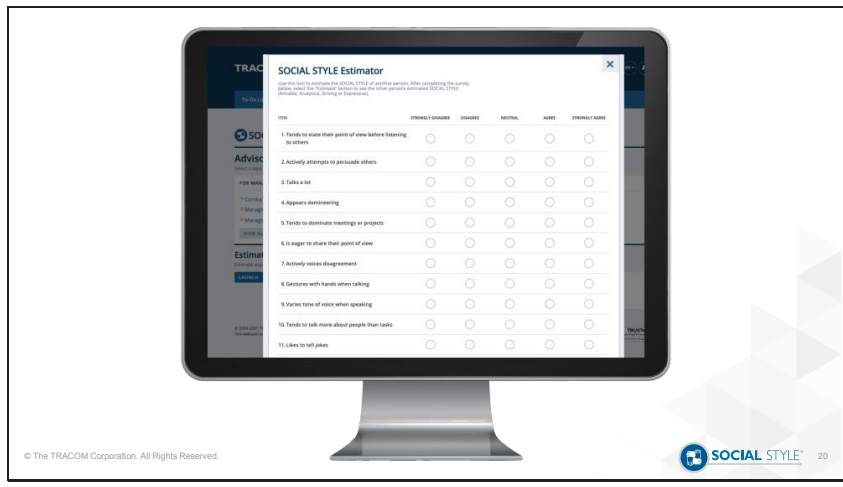


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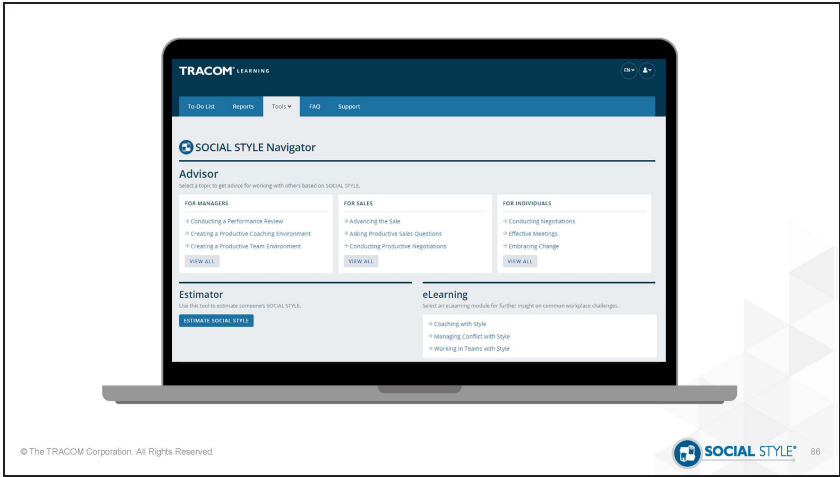
1 Minute

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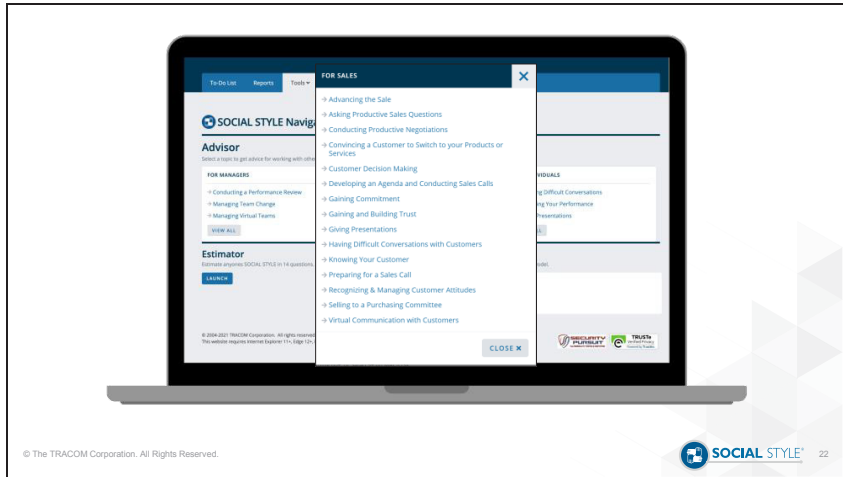


Optional demonstration, time permitting

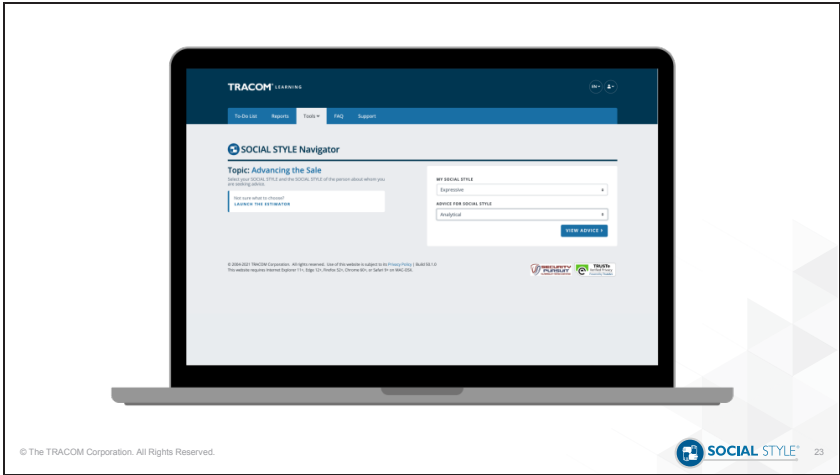


Optional demonstration, time permitting

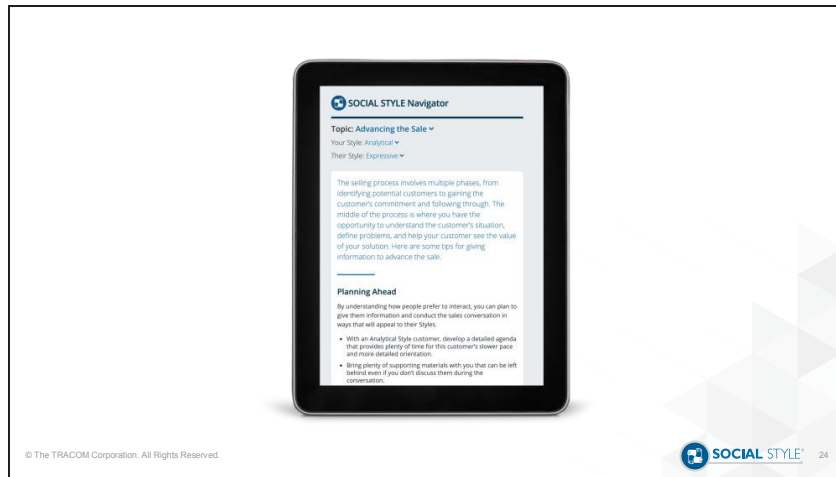
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Optional demonstration, time permitting

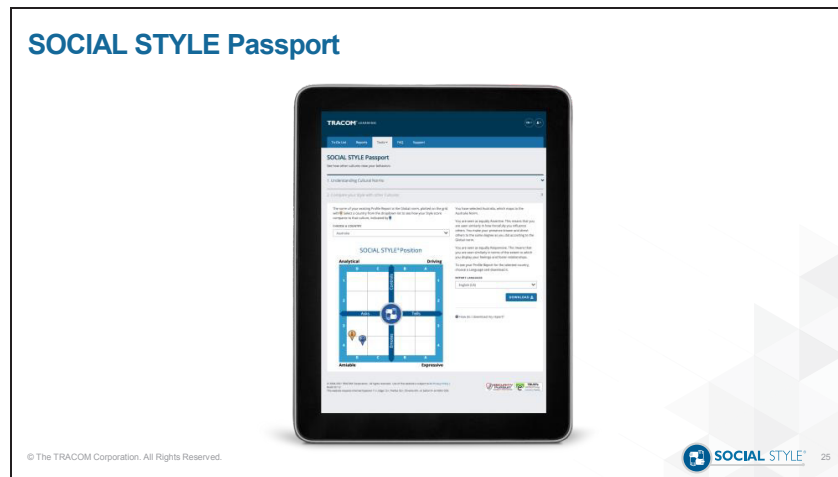


Optional demonstration, time permitting



Optional demonstration, time permitting

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**Optional demonstration, time permitting**

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THANK participants and conclude the session.

Video Scene Overview

PART 1 OVERVIEW:

The team participates in a meeting to discuss a product that is not meeting a client's expectations. The interaction gives insight into how each Style deals with the problem. The characters are:

Lana (Analytical): Wants structure and to approach the problem with facts and details.

Kyle (Driving): Wants to "just get started" and quit wasting time. Likes to get things done.

AJ (Amiable): Wants to keep the peace and pulls in the good points of the other three people. Wants to work on the problem as a team.

Abby (Expressive): Wants to look at the "big picture" and be creative as to how to solve the problem.

Kyle and Lana are highly focused on the task that needs to be done while using the available data. They go about it differently, but they are both focused on the task. AJ and Abby are focused on ensuring that people's needs are met. Again, they are different in how they look at the people side of the equation. AJ wants everyone to work together and be a team. Abby wants to look good and to make her client happy.

PART 2 OVERVIEW:

The group is working on the problem and the interaction gives information on how each person approaches the problem, (i.e. what their Need and Orientation is) and shows AJ taking his Growth Action to initiate.

Lana (Analytical): Provides the specific details and facts of what happened. Her Need to be Right is evident with having all the facts.

Kyle (Driving): Focuses on getting things done with information/facts. His Need for Results is evident in his words and approach.

AJ (Amiable): Supports Abby's proposal to provide "hand-holding" and focus on making people happy. His Need for Personal Security is seen through his support of Abby and in the solution he proposes. He pulls everything together by taking his Growth Action to Initiate and having everyone work together as a team to deal with the problem.

Abby (Expressive): Focuses on solving the problem through the people aspect. She wants the solution to be creative, as well as work with the client from the people side. She also stresses that she doesn't want to look bad — the Need of the Expressive Style for Personal Approval is seen here.

Video Scene Scripts

PART ONE

FADE IN

LANA:

So, everybody have an agenda?

KYLE, A.J. ABBY:

Yes, yeh, uh

KYLE:

(finishing-up using smartphone touch screen) I've got a lot to do this afternoon. There's no reason we shouldn't be able to take care of business and be out of here in a reasonable amount of time. Who will put together a summary and document our decisions?

A.J.:

Well, I brought this, and if nobody minds about the sound quality, it should do the job. Now....

KYLE:

(cutting off A.J.)

I'm sure it will be fine. As long as we can refer to it later in case the Asia- Pac team has any questions.

Now we all have an agenda and a copy of the research so, let's get started. Now we all know the problem: How to keep TriTec..., one of our largest clients, from cancelling the contract on the Mark 1 and jumping ship.

ABBY:

(cutting off Kyle and hand gesturing)

Just a minute, Kyle. Before we get too far on this, I feel one of our biggest problems is all this material.

LANA:

I thought we agreed on this agenda and approach last week. We talked about the importance of getting our research together.

ABBY:

Just hear me out, Lana. Agendas and research are fine... BUT! you have to admit, this is getting completely out of hand.

LANA:

Oh, Really.

ABBY:

Yes! It's restrictive, and it always leads us down the path that is safe... and boring.

A.J.:

Abby, we all agreed on this.

ABBY:

(cuts off A.J.)

So what if we did? What we need now is something more innovative and impactful. And, we're not going to get it by being constrained by yesterday's agenda and reams of historical data.

LANA:

My, how we exaggerate. And so, you propose we toss out all our structure and direction. How productive is that going to be?

A.J.:

(nodding his head affirmatively)

Lana has a point. We don't want to act too spontaneously, do we? I mean we worked a very long time on getting the agendas and the background information.

KYLE:

We're wasting time, people, we need to move ahead and focus on next steps.

ABBY:

Exactly my point. More than ever, we need to focus... on the big picture here. This market is moving very fast but that's no reason why we should be losing clients. We either have the products and services that our customers want to buy, or our competition is going to leave us behind. That, in a nutshell, is the problem here. *(gesticulates toward the reports.)*

Getting bogged down by details is part of the problem!

LANA:

These details are valid points of concern. Isn't paying attention to the little things what distinguishes us from "the other guys"? Overlooking the details sounds like risky business to me. *(folds her arms and leans back.)*

KYLE:

(dismissively.)

If you don't all mind, I'd like to get something done, today. You know, as far as I'm concerned, the most important thing is that we just get started with something today--with, or without the details. Let's develop a plan and get going on it. I've got other things to do.

A.J.:

Now Kyle, I think that we've been moving pretty fast lately. And I can see where Lana is coming from. The agenda's a good starting point and looking at the material makes a lot of sense. Now before we go out on a limb, let's just take some time to review the data and listen to each other's ideas?

KYLE:

Fine. The agenda and the research are in and we'll stay flexible. Now is everyone satisfied? Can we finally start moving something forward?

ABBY:

(agreeing with A.J.)

Excellent A.J.! And a little more creativity in your approach wouldn't hurt next time, either. *(gesturing to Kyle)* I mean, after all, there's more to this world than crunching numbers. This historical data is meaningless to me. Let's try putting the "wow factor" into our solution this time!

KYLE:

Maybe if we spent a little more time number crunching, we wouldn't be in the mess we're now in with TriTec.

A.J.:

(showing facial discomfort with conflict)

I don't think that's very helpful. We're a team, right?

LANA:

(neutral, non-confrontational)

All I'm suggesting is that we don't overlook important facts and details--to make sure we're doing the right thing before we rush into a bad solution.

KYLE:

Nobody's overlooking facts. And we may not be as thorough as you'd like, Lana, but we don't have the time to take a microscopic look at each and every detail. We need to come up with a solution in a reasonable amount of time or it won't matter to TriTec what our solution is. It's not a perfect world.

LANA:

Fair enough. We'll shoot for reasonable.

ABBY:

Oh, come on, Lana. All we're asking for is a little bit of flexibility here.

LANA:

Just remember, if we overlook critical information for the sake of expediency we're all going to be paying for it in the end.

A.J.:

That's a good point and I think we can all agree on that.

ABBY:

Hold on! Just a minute ago, you said you wanted to hear my ideas! What now you're all of a sudden back into the details again?!

(dip last sound bite as fading to black)

FADE OUT

PART TWO**FADE IN****LANA:**

... tens of thousands of dollars. Based on recent background indicators, the economy, our competitors, our own investments into new equipment and systems and, more specifically, our upgrading to a cloud-based system...

ABBY:

None of which pertains to the problem at hand.

(to the group)

I'm sorry, Lana, but we have an unhappy client. And what do you do when somebody's unhappy? You spend time with them.

KYLE:

Spend time doing what?

ABBY:

(somewhat animated)

Showing them we care. Be there for them, letting them know we're concerned and committed to them. If we have to, we make promises to buy ourselves some time.

KYLE:

(slightly annoyed)

Time for what? Being friendly isn't going to solve anything.

ABBY:

If it buys us some good will, that never hurts either.

LANA:

(calm and methodical)

Abby, may I show you something? The research data gives us a clear picture of TriTec's financial performance over the last 18 months.

ABBY:

(gesturing to research report)

I don't need to look at that. What we're dealing with here at TriTec is an unhappy client, not financial reports.

KYLE:

Bad financial performance can make anyone unhappy, especially when it starts costing jobs.

ABBY:

Oh, come on, Kyle. You know as well as I do that the situation is not that bad. Let's not be so dramatic! I am telling you guys, this is a people problem; it calls for a people solution. All we need to do is convince TriTec that we can provide the service better than anybody else. Relationships got us into TriTec in the first place. Managing those relationships is how we're going to stay there.

KYLE:

(asks for report from Lana who hands it to her)

May I?

(glances at figures, then to ABBY)

Now look at these figures. You're telling me this entire situation can be saved by simply visiting the client? This is business; business is all about the bottom line.

A.J.:

(calmingly)

Now, wait a minute, Kyle, we shouldn't be so quick to dismiss the value of relationships. Now Lana's figures are fine...

LANA:

These aren't "my" figures. I didn't make them up.

A.J.:

You know what I mean. I think we shouldn't dismiss what Abby's saying. Now TriTec is not happy with us. We can't ignore that, can we? I just think that this is a good time to try a personal approach.

KYLE:

(condescending, dismissive)

Oh, A.J., please. We're not going to solve this problem with smiles and soothing promises. We need to come up with real solutions to real problems.

A.J.:

I'm sorry; I have to disagree with you. Personal attention and concern can fix problems. I've had to do my fair share of relationship fixing at TriTec ever since this problem first surfaced.

ABBY:

I'm with A.J. Whatever we come up with at this meeting, it is critical that it includes a creative way to demonstrate to TriTec that we care, that we can provide support for whatever is needed and make this a project a great success!

LANA:

(LANA rolls her eyes and sighs)

ABBY:

What?

LANA:

Are we getting away from the real point?

ABBY:

And, what would that be?

LANA:

Do you remember when you closed the sale?

ABBY:

I don't know, four or five months ago, I suppose.

LANA:

My department received the request to reconfigure the system on June 14th.

ABBY:

Sounds about right.

KYLE:

Yes, and then she spoke with me right afterwards about fast-tracking the credit approval process, which we did.

LANA:

The order came through on June 14th and delivery was scheduled for 5 weeks. But it was delayed.

ABBY:

I explained the problem to TriTec. They said it was okay.

LANA:

(speaking somewhat slowly)

Unfortunately no one explained it to us. I received a message from you on July 5th, telling me that the servers were going to be in place on the 15th, a full week before you had promised it. I sent you a message explaining the difficulties with the requested modifications and the amount of effort it was going to take to complete them.

ABBY:

Wait. I'm sorry. I'm confused with all these dates. What are you saying?

LANA:

Let me make it simpler. The servers were shipped early and we didn't finish what final modifications we could do until nearly four weeks later.

ABBY:

(animated but not attacking)

Oh, no. Well, no wonder why they're unhappy. Every morning, they're showing up to work to unopened boxes and unusable technology!

KYLE:

We certainly made an impression on them!

ABBY:

Yeah. And when A.J. showed up with his system integration and training team, they probably had lost complete confidence in us.

A.J.:

Well, they were a little upset.

ABBY:

Of course they were! The servers were already in place, and nobody there wanted to cause any controversy in letting us know.

A.J.:

Oh they did, believe me. In the training sessions I just told them that the training they were doing now would get them ready for when the service was up and running.

KYLE:

What a mess. Sorry, A.J. We could have cooperated more with you.

A.J.:

It's okay; you didn't know. And I couldn't tell them because I didn't know myself.

ABBY:

I knew something was wrong. They never seemed to believe me when I tried to convince them how great the future would be with this system. There were always really troublesome questions.

LANA:

And, don't forget, we had to send a support team on-site two times to finalize modifications.

ABBY:

Well now, that really bothers me. Why should it take two times? That makes me look bad. I like to follow through with what I promise.

LANA:

Well, maybe you promised them too much. Frankly, some of the things that they were led to believe, the basic system just wasn't designed to handle.

ABBY:

(highly animated, directed at LANA)

Are you suggesting that I didn't do my job? That these people didn't know what they were getting?

LANA:

All I'm saying is that, maybe, they were asking for things that we couldn't do with the system.

ABBY:

(blunt, fast pace)
Such as?

LANA:

(begins hesitantly, as if surprised by the direct question and needing to think)

Well, things like vast bandwidth, unrestricted streaming, continuous data backups, international security protocol, just to name a few. The Mark-One you sold them wasn't designed to support all those things.

ABBY:

Well then maybe it should be redesigned! Let me tell you, I spent long hours with these people explaining to them exactly what they were getting with the basic system. They were perfectly aware of that. And they knew that there were extra add-ons and it could be upgraded.

LANA:

Not this version. When you were through promising them customizations to the basic system, it would have cost twice as much as if they'd just purchased the Mark-Two in the first place.

ABBY:

You have GOT to be kidding me! How do you expect me and my team to convince a client to invest huge amounts of money in a technology without emphasizing its capabilities? What good is it if it can't be upgraded?

LANA:

(folds arms and leans back)
I don't know what else to say.

KYLE:

(frustrated and taking control; very direct but relatively unanimated)
Now, come on people. This isn't helping. We still have a major problem here.

A.J.:

That's right. Aren't we a team? I mean, we've managed to do pretty well up to this point. And I'm confident that we can pull through this as long as we stick together. So, how about this? I'll make sure that my customer support team will ease any kind of lingering anxieties about the system. All right? And, Abby, can you go back and talk to them and let them know that we are behind our commitments and that we will help them with any rising issues that may come up?

ABBY:

Absolutely.

A.J.:

And, Kyle, can you go back and work with them on any add-on capacities that will give them future capabilities with the system without any big, major investments? And, Lana, can you see if there's anything that your department can do about some reasonable short-term modifications?

LANA:

I will, but I can't make any promises.

KYLE:

Well, those are some good, positive suggestions, A.J. Let's meet later this week to check our progress.

LANA:

It seems like one thing's for sure. We're going to need a lot more cooperation between departments if we hope to pull this thing off. Aren't we?

KYLE:

Well, it's a start. Definitely enough to put a solution together.

FADE OUT