



**SOCIAL STYLE**<sup>®</sup>

FOR SALES

**Selling Virtually with  
SOCIAL STYLE**<sup>®</sup>

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**TRACOM**<sup>®</sup> GROUP  
THE SOCIAL INTELLIGENCE COMPANY<sup>®</sup>

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# Session Overview

The Selling Virtually with SOCIAL STYLE<sup>®</sup> course is a 90-120 minute awareness and skill-building program for salespeople based on the SOCIAL STYLE approach to interpersonal relationships. As the originators of the SOCIAL STYLE Model<sup>™</sup>, TRACOM's years of training experience and research were used to develop this course to be a learning experience that increases the effectiveness of salespeople.

The target audience for the program is salespeople who have previously completed a SOCIAL STYLE & Versatility program. Prior working knowledge of the four SOCIAL STYLEs and the components of Versatility is assumed. This program is not suitable for learners who have limited or zero exposure to Style and Versatility.

This facilitator guide contains suggested speaking notes for each of the PowerPoint slides (visuals), along with corresponding pages from the Participant Workbook. To preserve this "facilitator friendly" layout, some participant workbook pages are repeated. Much of the content for this program is contained in the workbook, so the facilitator is encouraged to review its content as an addition to the facilitator notes in this guide.

## Overview

As this is an extension program, it is not designed to facilitate high levels of participant interaction. It is short, fast-paced and designed to extend existing knowledge gained from a SOCIAL STYLE and Versatility program. The effectiveness of this program will be dependent on the real-life examples that the facilitator adds to the existing content. This course is designed to be facilitated by a certified SOCIAL STYLE instructor who has virtual selling experience.

## Application

The course is designed to take salespeople beyond a conceptual understanding of Style and Versatility to the application of new approaches to the virtual sales environment.

## Group Size

The session is most effective with a group of 6 to 25 participants. The program can be delivered with larger groups; however, the larger the audience, the less effective and impactful the program.

# Suggested Agenda

10 mins

## Introduction

- The Shift
- The Paranoid Salesperson
- How SOCIAL STYLE Works With the Sales Process

15 mins

## Virtual Profiling

- Profiling by Email
- Profiling by LinkedIn
- Profiling Virtually

25 mins

## Setting the Virtual Sales Stage

- Key Style Characteristics
- Encouraging the Customer To Be Versatile
- Setting the Stage Do's & Don't's

10 mins

Break

30 mins

## Managing the Virtual Sales Stage

- Behaviors to Expect
- Managing Customer Tension
- Selling to a Committee
- Building Relationships Virtually
- Earning Trust Virtually

20 mins

Optional Activity: Debriefing Profiles

10 mins

Additional Resources & Close






**SHOW  
TITLE SLIDE**

**WELCOME** participants to the session and tell them that in this session they'll learn to:

- Profile customers virtually by analyzing their behaviors and developing a "Style Hypothesis"
- Set the virtual sales stage by focusing on the Style Need and Orientation of customers
- Manage the virtual sales stage by anticipating customers' behavior and addressing interpersonal tension
- Utilize several resources that are available for improving the ability to sell virtually


**SHOW  
VISUAL #1**

**SAY** If we think about the current situation, the virtual sales environment, we don't have the ability to engage in a number of sales activities that have historically made our sales role easier. In-person coffee catch-ups with clients allow us to obtain important sales intelligence about our customers—their challenges, who is making the decision, who might be moving into other roles, etc. In the virtual world, sales interactions tend to be far more formal. A virtual meeting has to have an agenda, a purpose, as most clients won't be open to an informal chat on their computers to share a virtual coffee!

We now have fewer informal intelligence-gathering meetings that can occur if we are on-site with a client—those informal hallway meetings that build relationships. Overall, we are having fewer face-to-face meetings, where we have our eyeballs on the client and can truly understand them—their problems, and their perspectives on our products, solutions and sales efforts.

## Introduction

### WHY IS IT IMPORTANT TO LEARN ABOUT SELLING VIRTUALLY WITH SOCIAL STYLE®?

This guide is designed to teach you about SOCIAL STYLE and Versatility concepts and how they can help you develop skills to become a more effective salesperson in a virtual sales environment. By applying the SOCIAL STYLE and Versatility concepts in this guide, you can develop better relationships with your customers and get more done, faster and with less effort. Plus, your customers will most likely increase their support and respect for you.

Simply stated, the sales world has changed; gone are the coffee meetings and impromptu sales conversations, and *hello!* selling virtually via Zoom/Microsoft Teams/Google Meet, etc. These changes formalized the sales process, making it more difficult to build relationships, obtain critical information and tailor our sales efforts as we once did. In the *good ole days (2019)*, we could be quite relaxed in our sales approach, and working inside a large, complex account was, in many ways, informal — those countless micro-meetings enabled us to qualify the customer, determine their decision-making process, determine their needs, design a solution, pitch and close. There were formal elements, of course, but much of it was informal information gathering so we could sell. In a virtual environment, it is much harder to get that critical information needed to tailor our sales efforts and more difficult to get time with clients to engage in sales conversations. These challenges mean we have to be more precise in our sales efforts and far more observant of our customer's buying behavior. Sales Versatility is a way to achieve this sales precision and continue to sell in this new environment.

Sales Versatility is selling in the way the customer wants to buy. For example, when you begin a virtual sales call, you may prefer to control when the cameras are switched on and how people enter the virtual meeting. However, while some customers may like this approach, others will be annoyed. Alternatively, as a salesperson, you may prefer sales meetings via video conference, whereas your customer may prefer short phone calls. When we sell in the way we would like to sell, as opposed to selling in the way *they* would like to buy, we reduce our sales effectiveness.

Selling Virtually with SOCIAL STYLE® will help you effectively plan and prepare for customer interactions, approaching customers and analyzing their needs, presenting results, handling objections and gaining their commitment in the ways your customers like to buy. You will learn to sell with more precision.

**SHOW  
VISUAL #2**

**SAY** The consequence of virtual selling is that we have less client contact, and the contact we do have is more formal, making it more challenging to build trust, qualify opportunities and gain critical information.

However, there is something very important to be aware of: many salespeople in regional roles have been selling virtually for years and are quite successful. So it is possible! To be successful in this new normal, your mindset is key. It is critical to believe that you can sell virtually.

Selling virtually requires more planning, effort and precision. It is easy to be a little reactive and less planful as a salesperson in the face-to-face role and still be successful. We can't be reactive and less planful in the virtual sales environment. If we are, we won't sell a thing. We need to be like those regional virtual sellers...we need precision.

Selling Virtually with SOCIAL STYLE will give you that precision. So today we're going to refresh and extend your knowledge of selling with Versatility as it relates to the virtual sales environment.

## Introduction

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**SHOW VISUAL #3**

AS PER THE SLIDE

**SHOW VISUAL #4**

**SAY** Before we talk about you and what you are doing, we need to look at your customer. We need to stand in their shoes.

Think about your customer and their current position. They, like you, are prone to Zoom fatigue and want to limit their virtual meetings. They are also now receiving more sales pitches than they ever have before, because of the combination of digital sales technology and the changes in salespeople’s approaches due to the pandemic. New technology makes it easier to conduct mass pitches, and the pandemic put pressure on salespeople to produce revenue. There are many organizations just like yours desperate to make a dollar. It’s an unfortunate fact that you are just another salesperson in their eyes, and it’s a mistake to believe you are anything but that. It’s okay to think they don’t want to meet, as you’re just another time thief to them!

The first “sale” we need to make is to move them from their current position of not wanting to give us their time, to the desired position: they want to give us their time. Sending them a product push thinly disguised as a whitepaper or inviting them to participate in a virtual best practice-sharing forum or webinar is not going to cut it. Everyone’s doing that, and if you do, you’ll be just like everyone else.

What we need to do is sell in a way that works for the customer. This has actually been the case in sales forever, but now, in the virtual sales environment—when your customer has virtual meeting and sales pitch fatigue—it is more important than ever.

This is where your Sales Versatility comes in.

**INTRODUCTION**

**SELLING VIRTUALLY WITH SOCIAL STYLE**

The first sale we need to make in the virtual sales environment is to convince our customers that meeting with us will be a good use of their time. While this has always been the case in sales, it is even more important now in this virtual world.

**THE SHIFT**

CURRENT POSITION	DESIRED POSITION
<p>I don't want another meeting I don't want another Zoom session I don't want more 'discovery' sessions I don't want any more 'pitches'</p>	<p>You are good to spend time with Happy to do a Zoom session with you You are useful You are my kind of person</p>
<p>I don't want to give you my time</p>	<p>I want to give you my time</p>

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**Participant Workbook**

**PARANOID SALESPEOPLE MAKE THEIR NUMBERS**

In the virtual environment of today's workplace, it is reasonable to conclude that our customers are suffering from *Zoom/Collaboration Fatigue*. They are sick of virtual meetings. Interestingly, research suggests that workers are spending 10% more time in meetings (Singer-Velush, Sherman & Anderson, 2020).

The shift to working from home (WFH) due to the COVID pandemic resulted in employees having to "collaborate" even more because they no longer see one another in the workplace. Consequently, your prospects and customers now have less time in the day and are spending more time in meetings. Therefore, their desire to spend time with you has most likely diminished. With many of your customers, you are just another meeting that will take up their time.

Additionally, due to the pandemic, most businesses have increased the amount of sales "pitching" they are doing in an effort to make up for revenue losses. The consequence is that your customers/prospects are now being "sold to" more than ever before.

While the picture outlined above may sound a little paranoid, being that way about our customer's mindset allows us to engage in more proactive sales behaviors. However, if we assume our customers are more positively predisposed to us and our products/services than they really are, we will be less likely to engage in proactive sales behaviors. This impacts our sales effectiveness.

The first "sale" we have to make is to convince our customers to agree to spend time with us. This is not a new concept in sales; however, in the virtual environment it is substantially more important than ever. It is also a sale that must be continuously made throughout the entire sales process. We call this first and continuous sale *The Shift*.

**YOUR VIRTUAL SALES MINDSET — IT'S A CHOICE**

Selling in a virtual environment is not new. In fact, many people in regional roles have been selling via virtual means for many years and have closed large deals without ever seeing their customers in person. For many of us used to in-person selling, a completely virtual sales process can feel foreign. However, your sales mindset is a large part of your success. To quote Henry Ford, "Whether you think you can or you can't, you are right." If you think you can't sell virtually, you won't. Your virtual selling success starts with a choice about what you think is possible, and our choices make us rise or fall.

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## SHOW VISUAL #5

SAY Some of you may have seen this before, during your SOCIAL STYLE training. The Platinum Rule is very different from the Golden Rule, which is to “treat others the way you want to be treated.” The Platinum Rule is to “treat others the way they want to be treated.” In other words, sell to your customers in the manner they want to buy.

I’ll give you an example of what this actually means. Let’s say I’m dealing with an Analytical Style customer. Selling to them in the way they like to buy means expecting them to not turn their camera on during virtual sales meetings. Whereas, selling in the way you want to sell means asking them to turn their camera on because it makes your job as a salesperson easier. However, if you ask them to turn their camera on, this will reduce your chances of moving them from their current position (you remember: virtual meeting/sales pitch fatigue, or “I don’t want to spend time with you”) to the desired position of “I want to spend time with you.”

I realize this might make you uncomfortable as a salesperson—selling to a blank screen—but your Analytical Style customer will love it.

As this diagram demonstrates, the virtual seller focuses on awareness of the customer’s Style at the start of the sales process, and management of the customer’s tension during the sales process.

## SHOW VISUAL #6

AS PER THE SLIDE

### INTRODUCTION

#### HOW SOCIAL STYLE WORKS WITH THE SALES PROCESS

Sales organizations typically follow a defined sales process — a series of steps designed to turn a prospect into a customer. By applying the knowledge you gain in this program, you will learn how to sell to your customers in the manner they wish to buy.



#### SELLING VIRTUALLY WITH VERSATILITY

Selling Virtually with Versatility has three distinct parts:

- **Virtual Profiling:** using all digital tools available to generate a SOCIAL STYLE hypothesis. For example, using e-mail received from your customers, analyzing their LinkedIn profile, reviewing articles written by them or watching YouTube clips. You can use all of this information to generate a SOCIAL STYLE hypothesis before you even meet your customer. This is a hypothesis to be confirmed or adjusted by observation of the customer’s behaviors. It is important to be aware the only way to determine a customer’s SOCIAL STYLE is through direct behavioral observations. However, a “digital” hypothesis is often quite accurate and an extremely useful starting point.
- **Setting the Virtual Sales Stage:** ensuring that your virtual sales meeting starts correctly. There are a number of universal virtual Versatility actions that should be taken for all SOCIAL STYLES. However, there are also a number of Versatility actions you should take to meet the SOCIAL STYLE Need and Orientation of your customer. This ensures your meetings start correctly and that you create “The Shift.”
- **Managing the Virtual Sales Stage:** ensuring you continuously manage the virtual sales meeting in a way that meets your customer’s SOCIAL STYLE Need and Orientation. During the meeting it is also critical that you test your SOCIAL STYLE hypothesis created during the virtual profiling stage, and adjust your sales approach accordingly. As the sales process progresses, continuously observing your customer’s tension levels becomes more critical to ensure sales momentum.

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**SHOW VISUAL #7**

**SAY** There are a number of digital sources we can use to gain clues to an individual’s SOCIAL STYLE. As a refresher, there are a number of aspects to remember when trying to determine someone’s Style.

First of all, we can’t actually see their SOCIAL STYLE; all we can see is a cluster or pattern of behaviors that represent a Style on two dimensions: Assertiveness and Responsiveness. This is important to remember, because many people make the mistake of trying to identify Style and guess incorrectly. The most accurate way to identify Style is to look at the behaviors one dimension at a time and identify patterns of behavior (the behaviors observed most frequently), and then the SOCIAL STYLE will emerge. Everyone can display all of the behaviors, so it’s about identifying a pattern.

In the virtual world, the most reliable sources for determining SOCIAL STYLE are virtual video formats and the least reliable are email and LinkedIn. However, in all observations of the behavior of others, it is important to separate Style clues from assigned authority and roles. In many situations, your customer is in the role of “buyer,” and in that role many customers can adopt the Style they think is most appropriate for the situation. Make sure you pay close attention to your customer when they are talking with others (as opposed to you) and when they are under pressure, because in these situations you may have a clearer display of their Style.

In the next few slides, we are going to walk through some of the digital or virtual media to target behaviors and learn about the relative levels of reliability for determining one’s Style. Remember, the task is to find clues that suggest patterns in order to generate a SOCIAL STYLE hypothesis.

Participant Workbook

## Virtual Profiling

It is possible to create a SOCIAL STYLE hypothesis by observing your customer’s digital behavior. Your customer’s e-mail, LinkedIn profile and other digital media can provide strong clues to their SOCIAL STYLE. However, this should be considered as a *working hypothesis* to be confirmed through behavioral observations. The SOCIAL STYLE behavior grid below is your guide.

SOCIAL STYLE	Skills Guide	Identifying SOCIAL STYLE
	<ol style="list-style-type: none"> <li>1. Monotone</li> <li>2. Task Subjects</li> <li>3. Facts/Data</li> <li>4. Less Hand Movement</li> <li>5. Rigid Posture</li> <li>6. Controlled Facial Expressions</li> </ol> <p><b>CONTROLS</b></p>	
<ol style="list-style-type: none"> <li>1. Slower Pace</li> <li>2. Fewer Statements</li> <li>3. Quieter Volume</li> <li>4. Non-directive/Relaxed Use of Hands</li> <li>5. Leans Back</li> <li>6. Less Eye Contact</li> </ol> <p><b>ASKS</b></p>		<ol style="list-style-type: none"> <li>1. Faster Pace</li> <li>2. More Statements</li> <li>3. Louder Volume</li> <li>4. Directive Use of Hands/Points for Emphasis</li> <li>5. Leans Forward</li> <li>6. More Eye Contact</li> </ol> <p><b>TELLS</b></p>
	<ol style="list-style-type: none"> <li>1. Inflection</li> <li>2. People Subjects</li> <li>3. Opinions/Stories</li> <li>4. More Hand Movement</li> <li>5. Casual Posture</li> <li>6. Animated Facial Expressions</li> </ol> <p><b>EMOTES</b></p>	

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**SHOW VISUAL #8**

**SAY** Before we look at generating a SOCIAL STYLE hypothesis by email, it is vital to understand that we are generating an assumption that can be confirmed or negated through actual observations. It is important to be aware that research shows a Style diagnosis by email will be accurate about 57% of the time.

I want you to focus on emails you receive, not emails you send. We tend to edit emails based on the power balance in a relationship. For example, most people will not spend much time editing an email to a colleague vs. an email to a leader or customer. Less-edited emails will provide a "cleaner" view of a person's SOCIAL STYLE when it comes to email. Many customers, when emailing a supplier, will not edit their emails as much, so you can often get a clearer view of Style. It also depends on how much contact you have had with them and how well they know you. Often, a pattern will emerge over a few emails.

Remember, this is not an exact science. You are simply collecting clues, and email is not the only source you would use.

**SHOW VISUAL #9**

**ASK** For each of the following emails, what is your SOCIAL STYLE Hypothesis?

- 1 = Expressive Style
- 2 = Amiable Style
- 3 = Driving Style

**VIRTUAL PROFILING**

**STYLE HYPOTHESES**

Style Hypothesis by E-mail

Driving: \_\_\_\_\_

Expressive: \_\_\_\_\_


Amiable: \_\_\_\_\_

Analytical: \_\_\_\_\_

Style Hypothesis by LinkedIn

Assertiveness: \_\_\_\_\_

Responsiveness: \_\_\_\_\_

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**SHOW VISUAL #10**

**SAY** We can also use LinkedIn to identify clues to an individual’s SOCIAL STYLE. This is often a great addition to the clues from email. However, there are two important caveats:

1. How much someone uses LinkedIn will determine how reliable the clues are;
2. The more senior a person is, the more likely it is their profile has been written by someone else, i.e., Corporate Communications.

By reading their summary, role descriptions and recommendations by other people—which often will, in fact, describe this individual’s Style—we can obtain a rough indication of Assertiveness and Responsiveness.

Looking at the Skills Guide in your Participant Workbook, the behaviors we might see are Assertiveness (more or fewer statements) and Responsiveness (subjects are task- or people-focused, told by using facts/data or opinions/stories).

**SHOW VISUAL #11**

**SAY** The recommendations the person receives are often a good indicator because they actually describe SOCIAL STYLE. They are written by others and the recipient has the option to accept or reject, but not change, them. You can see in this profile the behaviors befitting an Amiable Style seem to be coming through relatively consistently. Remember, this is not an exact science; we are generating a hypothesis still to be confirmed by behavioral observations.

**VISUAL #12**

**SAY** This profile suggests Driving Style based on the content in the summary section.

VIRTUAL PROFILING

STYLE HYPOTHESES

Style Hypothesis by E-mail

Driving: \_\_\_\_\_

Expressive: \_\_\_\_\_


Amiable: \_\_\_\_\_

Analytical: \_\_\_\_\_

Style Hypothesis by LinkedIn

Assertiveness: \_\_\_\_\_

Responsiveness: \_\_\_\_\_


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**SHOW VISUAL #13**

**SAY** During virtual communications, determining an individual's SOCIAL STYLE is the same as it is for in-person encounters. We focus on one dimension at a time and look for the most frequent patterns, always remembering these rules to get it correct:

Avoid jumping to conclusions about the SOCIAL STYLE of your customers. It takes multiple observations made over a period of time and under a variety of circumstances to reveal a pattern of behaviors. Given the right circumstances, you might observe a customer exhibiting behaviors associated with any of the four Styles. Don't let these out-of-character behaviors mislead you.

Remain objective. Your personal feelings toward your customers can only hinder the accuracy and objectivity of your observations.

Separate Style clues from assigned authority or roles, such as "buyer."

Moderate stress clarifies Style. It is fairly easy for most people to be versatile when they are comfortable with the level of tension they are feeling. The more versatile they are overall, the more difficult it is to identify their Style. However, when people become uncomfortable with the level of tension they are feeling, they typically rely on those patterns of action, their SOCIAL STYLE, that worked well for them in the past.

Get out of the way. It is difficult to objectively observe the behavior of customers when you are a part of the action, or when they are busy reacting to you and your Style. Give them a chance to show their Style by watching how they interact with coworkers when you are not as closely involved in the situation.

Participant Workbook

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**SHOW  
VISUAL #14**

SAY By way of summary, this is how you will most likely experience each of the Styles.

Participant  
Workbook

### SOCIAL STYLE BEHAVIORAL HIGHLIGHTS

Below are the most frequent behavioral patterns for the SOCIAL STYLES.

#### ANALYTICAL STYLE

- Slower-paced, slower to act
- Makes strong efforts to organize
- Shows less concern for relationships
- Works in the historical time frame
- Takes action cautiously
- Tends to avoid personal involvement

#### DRIVING STYLE

- Faster-paced
- Makes efforts to control
- Less concerned for caution in relationships
- Works in the present time frame
- Tends to direct the actions of others
- Tends to avoid inaction

#### AMIABLE STYLE

- Slower-paced
- Makes efforts to relate
- Shows less concern for affecting change
- Works in the present time frame
- Shows supportive action
- Tends to avoid conflict

#### EXPRESSIVE STYLE

- Faster-paced
- Makes efforts to involve
- Shows less concern for routine
- Works in the future time frame
- Tends to act impulsively
- Tends to avoid isolation



**SHOW VISUAL #15**

SAY So far, we have focused on helping you get ready for the virtual sales call by conducting the virtual profiling activities. Next, let's move into "setting the virtual sales stage."



**SHOW VISUAL #16**

SAY Setting the stage is a critical aspect to ensure we achieve the shift from the current to the desired position—moving the customer from "I don't want to give you time," to "I do want to give you time."



**SHOW VISUAL #17**

SAY These are the key aspects for all Styles that will create the best chance of the shift. I am going to talk about point 10 in more detail.

SETTING THE VIRTUAL SALES STAGE

## Setting the Virtual Sales Stage

Setting the virtual sales stage ensures that your sales approach is focused on your customer's SOCIAL STYLE Need and Orientation. There are a number of universal actions that salespeople should take to ensure they are selling with Versatility. There are also a number of actions that relate to a specific SOCIAL STYLE that will increase your chance to achieve *The Shift*. Below are the universal actions to take for all Styles.

### VIRTUAL VERSATILITY FOR ALL SOCIAL STYLES

1. Be on the call 5 minutes prior to the start
2. Open all documents prior to entering
3. Organize all screens prior to entering and practice beforehand
4. Ensure you enter with camera and microphone on
5. Check your background
6. Ensure you are not showing the "nostril view"
7. Ensure your face is well illuminated
8. Ensure you are framed well
9. Dress one level above your customer
10. Know/hypothesize their end state




**SHOW  
VISUAL #18**

**SAY** One of the ways to maximize the chance of “The Shift” is to think about the customer’s end state. This is not strictly related to SOCIAL STYLE, but a good sales practice, nevertheless.

End state refers to what the customer wants to fix, prevent and/or accomplish. Just like they sound, “fix” refers to what they want to fix in their current environment; “prevent” is what do they want to prevent in the future; and “accomplish” is what they want to accomplish in the future. Interestingly, “prevent” can be the strongest motivator, for the same reasons why people often won’t make a buying decision—as humans we are risk averse. As salespeople, it is vitally important that we understand what the customer wants to prevent in the buying decision just as much as we need to focus on what they want to fix and accomplish. Many salespeople make the mistake of focusing on fix and accomplish only.

There are two levels: surface is what your customer will tell you that’s related to their job, their company, etc. Depth is related to them as a person and is the reason they make the buying decision, but most of the time this is not articulated directly to you. We need to listen carefully to the “sub-text” of what they are saying. Customers will spend all the time in the world with you if they believe you are focused on their end state and your products and services can help them achieve it.

Most salespeople believe they are focused on their customer’s end state, but they’re really not. For example, many whitepapers that are sent out are not focused on the customer’s end state; they are thinly disguised sales pitches focused on the seller’s end state. Many sales questions are not designed to identify a customer’s end state. They are used to identify the need that the salesperson can sell to, and many sales pitches are focused on what and how the product or service works, not how it delivers the customer’s end state.

Prior to meeting with your customer, it’s a good sales practice to create an end-state hypothesis. Forget about your product and imagine you are them: what they want to fix, prevent, or accomplish in their role. It is surprising how little this is done, even at the highest levels of sales. This will differentiate you from many salespeople.

**SETTING THE VIRTUAL SALES STAGE**

### Setting the Virtual Sales Stage

Setting the virtual sales stage ensures that your sales approach is focused on your customer’s SOCIAL STYLE Need and Orientation. There are a number of universal actions that salespeople should take to ensure they are selling with Versatility. There are also a number of actions that relate to a specific SOCIAL STYLE that will increase your chance to achieve *The Shift*. Below are the universal actions to take for all Styles.

**VIRTUAL VERSATILITY FOR ALL SOCIAL STYLES**

1. Be on the call 5 minutes prior to the start
2. Open all documents prior to entering
3. Organize all screens prior to entering and practice beforehand
4. Ensure you enter with camera and microphone on
5. Check your background
6. Ensure you are not showing the “nostril view”
7. Ensure your face is well illuminated
8. Ensure you are framed well
9. Dress one level above your customer
10. Know/hypothesize their end state



**SHOW VISUAL #19**

**SAY** Understanding the Key Characteristics of each of SOCIAL STYLE—Need, Orientation and Growth Action—is critical to you setting the stage.

Many salespeople, no matter the seniority, make the mistake of selling in the way they would like to buy. For example, Amiable Style salespeople may overly focus on relationship building, while Driving Style salespeople may not pay enough attention to relationship building. Expressive Style salespeople may overdo it on the “show” part of presenting, while Analytical Style salespeople may underwhelm on the “show” part. It is a natural human bias to believe we are a perfect human and everyone likes to buy the same way we do. This thinking gets in the way of sales effectiveness, reducing the chances of achieving “The Shift.” It is vital that we sell in the way customers want to buy (the Platinum Rule).

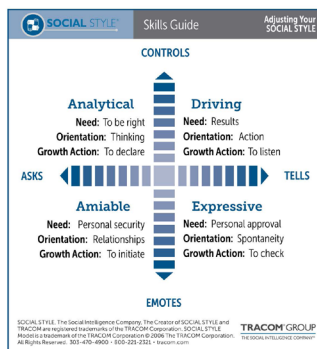
Most obviously, the Need of each Style can help you hypothesize the customer’s end state prior to the sales process and guide your questions and sales pitch. It also helps you secure appointments. The Orientation of each Style tells you how to sell—working in line with their orientation will help them see you as “their kind of person” and, therefore, they become more willing to spend time with you. For example, appointment setting with an Amiable Style customer is very different from appointment setting with an Analytical Style customer. How you start a virtual meeting with a Driving Style customer is very different from how you start a virtual meeting with an Expressive Style customer.

So far, we have focused on your Versatility when setting the stage. We can also encourage your customer to be Versatile. However, it is important to note that the primary responsibility of Versatility sits with us. We need to be Versatile, since we are the ones doing the selling. It is nice if the customer is or becomes Versatile, but we must never believe we are entitled to it or expect it. We certainly can try to encourage it, though.

**KEY SOCIAL STYLE CHARACTERISTICS**

From the pattern of behaviors associated with each Style, we can make certain inferences about the key characteristics of each. These characteristics are Style Need, Style Orientation, and Growth Action.

The Style Need is a person’s primary motivating force. The Style Orientation is how a person of a particular Style typically goes about meeting the Need (how they like to work). The Growth Action is what a person of this Style tends to overlook, ignore, or avoid in their interactions with others. Being a versatile salesperson is about focusing on your customer’s need and supporting their orientation while you take your own Growth Action.





**SHOW VISUAL #20**

SAY Encouraging your customer to be Versatile is about convincing them to take their Growth Action as a way to achieve their need.

AS PER THE SLIDE, WALK THROUGH EACH SOCIAL STYLE WITH RELEVANT EXAMPLES

SETTING THE VIRTUAL SALES STAGE

ENCOURAGING YOUR CUSTOMER TO BE VERSATILE

There are a small number of specific actions you can take to encourage your customer to be more Versatile toward you in a virtual sales environment. These actions are part of setting the virtual sales stage.

<p><b>Analytical Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Sell “voicing their opinions” in the meeting as a critical data point to ensure the most logical decisions are made; ask them if they think a meeting is necessary</li> <li>■ When co-creating the agenda, ask them to allocate time to the agenda items and their thoughts on priorities</li> <li>■ Ask them if the pre-reading/information has given them sufficient detail to reach a conclusion</li> <li>■ Ask them what other information they would like to review before the meeting</li> <li>■ After each meeting, follow-up should be succinct per agreed-to timelines</li> </ul>	<p><b>Driving Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Sell “listening” in the meeting as a way they can achieve their results —saving time, money or effort</li> <li>■ Do not schedule meetings unless absolutely necessary</li> <li>■ Use phone or e-mail, as this is their preferred communication method</li> <li>■ Schedule meetings at times that suit these individuals so they don’t multi-task during the meeting</li> <li>■ Prior to meetings, call them and ask them to describe their priorities</li> <li>■ After each meeting, thank them and send the list of agreed-to actions</li> <li>■ Avoid excessive follow-up; they don’t need it</li> </ul>
<p><b>Amiable Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Sell “voicing their concerns” in the meeting as a critical aspect to ensure strong relationships</li> <li>■ Ask them who they think should be in the meeting</li> <li>■ Ask them how they would like the call to proceed and ask about their concerns/ hesitations</li> <li>■ Make efforts to regularly keep in touch outside of the sales process</li> <li>■ Show this person how they have helped you professionally and personally</li> <li>■ Explain how disagreement in the past has helped strengthen your relationship with them</li> <li>■ After each meeting, check in to ask how they think it went</li> </ul>	<p><b>Expressive Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Sell “checking themselves” in the meeting as a way to improve their personal brand</li> <li>■ Be available and very responsive when they contact you</li> <li>■ Structure your meetings so they have their “time in the spotlight”</li> <li>■ Refer to them and their insights during the meeting</li> <li>■ Prior to meetings, call them and share your plan for the meeting and their role in it</li> <li>■ After each meeting, use different communication forms to check in</li> <li>■ This is the Style that needs the most follow-up; however, follow-up in a conversational way</li> </ul>



AS PER THE SLIDE - WALK THROUGH EACH SOCIAL STYLE WITH RELEVANT EXAMPLES

## SETTING THE VIRTUAL SALES STAGE: DO'S AND DON'T'S

### ANALYTICAL STYLE

**Do**

- Share agenda/detail/questions before-hand
- Call before meeting – *is the detail sufficient?*
- Be serious, formal and measured

**Don't**

- Expect high conversation involvement
- Focus on personal relationships
- Be flippant

### DRIVING STYLE

**Do**

- State the expected outcome of the meeting
- Ask for their approval on the agenda
- Allow them control of meeting settings

**Don't**

- Start late
- Be a gatekeeper on meeting entry
- Be disorganized

### AMIABLE STYLE

**Do**

- Co-create the agenda with them
- Be 5 minutes early to allow for social chat
- Enter with camera and microphone on

**Don't**

- Assume interest because they agreed to meet
- Jump right to task
- Involve others without letting them know

### EXPRESSIVE STYLE

**Do**

- Ask for their "insight" on the agenda
- Acknowledge them immediately
- Approach them casually and informally

**Don't**

- Provide too much detail in advance
- Recap the past
- Too tightly structure the meeting







**SHOW VISUAL #24**

SAY From a virtual perspective, these are the behaviors to expect and accept. Don't judge or misinterpret.

AS PER THE SLIDE, WALK THROUGH EACH SOCIAL STYLE WITH RELEVANT EXAMPLES

**VIRTUAL STYLE BEHAVIORS TO EXPECT: DON'T JUDGE**

There are a small number of specific behaviors that you can expect from your customers in a virtual environment; it is critical to anticipate and avoid misinterpreting them. Be aware of your cognitive SOCIAL STYLE biases with regard to evaluation and expectation of customer engagement behavior. You are one Style, and 75% of customers will behave differently from you.

<p><b>Analytical Style Customer</b></p> <ul style="list-style-type: none"> <li>They will approach the virtual team in much the same way they approach in-person teams.</li> <li>During virtual interactions, they will often be quiet. When they do speak, they will focus on tasks and information related to work topics, with very little discussion of people. The best way to involve them is to explicitly ask for their opinions and input.</li> <li>Don't mistake lack of involvement as acceptance or resistance — ask them.</li> </ul>	<p><b>Driving Style Customer</b></p> <ul style="list-style-type: none"> <li>During virtual meetings, they are likely to make their presence known. They may be less collaborative than they are in-person and may try to dominate conversations even more than in-person.</li> <li>If they are asserting themselves to the exclusion of others, step in as required and call on others to offer their opinions. Do this in a non-confrontational way that is focused on their need for results.</li> <li>Don't mistake multi-tasking for indifference; they may have already decided to buy — ask them.</li> </ul>
<p><b>Amiable Style Customer</b></p> <ul style="list-style-type: none"> <li>During virtual interactions, they will generally be less talkative. They will participate, but will sometimes fill in the spaces between more talkative members and may only contribute when their input is directly sought. It will be important for you to find ways to involve them in meetings.</li> <li>In a virtual environment, they may be very hesitant to disagree or offer their viewpoints if they think those views will be contrary to the opinions of the rest of the team.</li> <li>Don't mistake agreement as endorsement — ask them.</li> </ul>	<p><b>Expressive Style Customer</b></p> <ul style="list-style-type: none"> <li>They are likely to be among the most talkative. They will attempt to be personable with the team, often sharing stories about themselves and encouraging others to do the same.</li> <li>They can sometimes be unprepared for meetings, and may try to rely on their personalities or charm to carry them through.</li> <li>Be cautious about providing too little structure to your meetings, since these individuals can dominate discussions and can stray from the purposes of the meeting. Do not needlessly stifle them during meetings, but have meeting structure.</li> <li>Don't mistake energy for buying signals — ask them.</li> </ul>



**SHOW VISUAL #25**

**REVIEW** The three steps, and the Need and Orientation of each Social Style.

**SHOW VISUAL #26**

**SAY** When we refer to tension management, we are talking about ensuring that your connection with your customer has the right level of tension to create a mutually productive relationship. The customer is getting what they want, and you are as well. When there is just the right amount of tension, the sale progresses. When there is too little tension the sale stalls. When there is too much tension, the sale derails.

The first mistake we usually make when managing tension in the sales process is that we don't focus on the customer's tension, we focus on our own. We focus on satisfying our own need and working in the way we like to work (our Orientation). This will often derail the sale. The customer experiences tension because the focus is on our Need and Orientation, which comes at the cost of their Need and Orientation. When we don't link our products and services to the satisfaction of their Need, there is not enough tension and the sale stalls.

In your Participant Workbook, there is further information on each Style's behavior under extreme tension, which we refer to as Backup Behavior. There are also some tips on how to recognize this behavior, and how to manage your customers when they begin exhibiting Backup Behavior.

**MANAGING THE VIRTUAL SALES STAGE**

### TUNING INTO TENSION

The SOCIAL STYLE Model™ can be especially useful for understanding and managing tension that can arise during the sales process. Two of the truest indicators of a salesperson's interpersonal effectiveness in dealing with customers are the ability to recognize when customers are being negatively impacted by tension and the ability to harness that tension and turn it into a positive experience that helps move the customer toward making a commitment to purchase.

#### TENSION – MOTIVATOR OR INSTIGATOR?

Sometimes tension can be brought on by pressures the customer is receiving from others within their organization. Tension can also be caused by a salesperson who is more focused on satisfying their Style Need than their customer's. As a salesperson, tension management is a critical task because the level of tension affects a person's motivation to buy.

For example, making too much small talk and "getting to know" chit-chat can create unnecessary tension in a customer who has a Driving Style and wants to get the sale done as efficiently as possible. Omitting such niceties might be a source of tension if your customer has an Amiable Style and needs to be comfortable with you personally before buying anything.

The **Tension Productivity Model** illustrates how tension can be either a motivating or destructive force in the sales process. When tension is low, productivity is usually low. In such cases, the customer has little or no impetus to move forward with a purchase decision. When tension is at appropriate levels (which varies from person to person), people tend to be motivated to get more done. When tension is high, productivity falls as more effort is expended on dealing with the relationship than with the task. In such cases, the customer can be too irritated, annoyed or frustrated to even think about making a commitment to buy.

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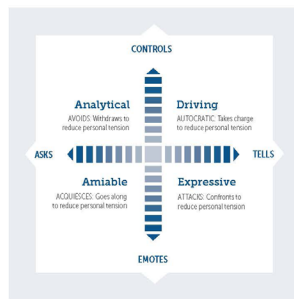
## BACKUP BEHAVIOR

**Backup Behavior** is what happens when you or your customers are unable to cope with high tension. It is an exaggerated form of Style behavior used by a person to reduce excess personal tension. Backup Behavior becomes a self-serving way to achieve a SOCIAL STYLE Need because it is done without regard for interpersonal relationships.

When a customer vents their tension toward you, there is typically a strong temptation to return the favor. However, meeting hostility with hostility or aggression with aggression can only increase the level of tension. The best way to deal with Backup Behavior is to recognize when tension is mounting and then quickly develop ways to constructively channel the tension into productive avenues that take advantage of a person's SOCIAL STYLE strengths.

Here is how each Style tends to exhibit Backup Behavior:

- The Driving Style often tries to take charge of the situation and forces others to act in order to accomplish a task or reach a goal.
- The Expressive Style often becomes angry, perhaps abusive and vents their feelings about the relationship that is the source of their tension.
- The Amiable Style often complies or acquiesces, typically without commitment one way or the other, because they don't want to risk damaging the relationship.
- The Analytical Style often avoids the whole situation by retreating to think over the facts and details of the situation.



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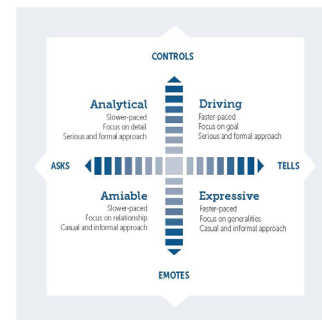
## AVOIDING THE NEED FOR TOXIC CLEAN-UPS

While some people do well at accommodating the SOCIAL STYLES of others, some are more "Style-bound" and seldom stray outside their Style behaviors. As a salesperson, you can avoid conflict, get along better and achieve higher levels of productivity by being aware of how Style-bound behaviors can be highly annoying to some people and, if left unchecked, can contribute to a relationship becoming toxic.

A toxic relationship occurs when Style-bound behaviors jeopardize the productivity of the relationship. This kind of relationship can occur between you and a customer. Typically, opposite Styles hold the greatest potential for turning into toxic relationships. But even two people of the same Style can develop a toxic relationship if strong displays of their Style behaviors go unrestrained.

The Style Behavioral Preferences chart illustrates how a toxic relationship may occur. For example, think about how an inflexible customer who expects a formal approach and focuses on details (a tendency of a person with an Analytical Style) might respond to a salesperson who insists on taking an informal approach and dealing in generalities (a tendency of a person with an Expressive Style). Then, consider the friction that might occur between a customer who needs to move at a moderate pace and focus on relationships (the tendency of a person with an Amiable Style) and a salesperson who is intensely focused on presenting key facts and making the sale now (the tendency of a person with a Driving Style).

### STYLE BEHAVIORAL PREFERENCES



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## MANAGING YOUR CUSTOMER'S BACKUP BEHAVIOR

When one of your customers uses Backup Behavior to reduce tension, you have the power to get the interaction and the relationship back on track by first recognizing the behavior as Backup Behavior, and then by countering with an appropriate response.

To successfully deal with a customer's Backup Behavior, first recognize the behavior. Then, support their SOCIAL STYLE's strength and avoid tackling their Growth Action until some other time. In some cases, you might want to wait until things settle down a bit before confronting the person exhibiting Backup Behavior.

Keep in mind that in some cases you might be part of the problem and it might be time to take your own Growth Action to better meet the SOCIAL STYLE Needs of your customers.

Analytical Style Customer	Driving Style Customer
<p><b>Backup:</b> Avoids</p> <p><b>Recognize the behavior:</b> Stops talking or gets quieter, avoids "the subject," folds arms, consistently looks away or walks away.</p> <p><b>Your response:</b> Emphasize/reinforce the value of their facts and data. Ask to compare their facts or processes with yours in a non-confrontational manner. Thank them for the attention to detail and explore with them the process for arriving at a viable solution.</p>	<p><b>Backup:</b> Autocratic</p> <p><b>Recognize the behavior:</b> Less discussion, less listening, tries to take control of the situation.</p> <p><b>Your response:</b> Show them how you can help them achieve the results or goals they are committed to accomplishing. Acknowledge your common goal; offer to review the tasks necessary to accomplish that goal.</p>
Amiable Style Customer	Expressive Style Customer
<p><b>Backup:</b> Acquiesces</p> <p><b>Recognize the behavior:</b> Appears to give in on the argument, makes statements that are conciliatory, but lacks commitment.</p> <p><b>Your response:</b> Encourage them to feel safe in becoming involved again and initiating points of view. Invite them to offer constructive criticism. Thank this person for their contribution to the team and work with this person to involve the input of others.</p>	<p><b>Backup:</b> Attacks</p> <p><b>Recognize the behavior:</b> Talks more, gets louder, more facial expression and more active hand gestures; seems to "take it personally."</p> <p><b>Your response:</b> Listen sympathetically, without evaluating or defending. Accept the emotion expressed without getting involved or committed by it. Compliment this person for their good ideas and offer to help them explore the merits of their ideas in more depth.</p>

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**SHOW  
VISUAL #27**

AS PER THE SLIDE, WALK THROUGH EACH SOCIAL STYLE WITH RELEVANT EXAMPLES

SAY This applies when selling to an individual. Next, we'll discuss selling to a group..

MANAGING THE VIRTUAL SALES STAGE

MANAGING THE VIRTUAL SALES STAGE: DO'S AND DON'T'S

ANALYTICAL STYLE

**Do**

- Show agenda and time parameters up front
- Support any data with source information
- Insert "pauses" for questions and comments

**Don't**

- Rely on visual images without data
- Move too quickly through the information
- End the meeting without asking if they need more detail

DRIVING STYLE

**Do**

- Show objectives up front
- Ask them to share their expectations
- Revisit the objectives throughout

**Don't**

- Show too many details
- Assume they're paying attention
- End the meeting without follow-up actions

AMIABLE STYLE

**Do**

- Find a personal connection at the beginning
- Ask open-ended questions to avoid "yes"/"no" answers
- Show images of people

**Don't**

- Assume they're agreeing with you
- Spend too much time on facts
- End the meeting without drawing out their feelings about your ideas

EXPRESSIVE STYLE

**Do**

- Use more images than text
- Move at a quick pace
- Let them build on ideas you share

**Don't**

- Take their feedback personally
- Appear uncommitted to your goals
- End the meeting without allowing them to speak their mind



**SHOW  
VISUAL #28**

AS PER THE SLIDE - WALK THROUGH EACH SOCIAL STYLE WITH RELEVANT EXAMPLES

SAY This applies when selling to a group, or "purchasing committee."

## SELLING TO A PURCHASING COMMITTEE

Selling to a purchasing committee, or any situation where there is more than one decision maker, is seldom a quick and easy process. The various Styles will take a particular approach to group decision making and will display various behaviors that suggest support or dissention to the group decision. Below are the key behaviors to watch for and the actions to take.

### Analytical Style Customer

- If these individuals believe that the purchasing committee is making a decision too quickly, they may try to slow down the process.
- They are sometimes reluctant to state their opinions or assert firm positions on the purchase decision to other committee members.
- Provide these individuals with all the information they need to come to a decision and let them know they can chat with you individually as required.

### Driving Style Customer

- Regardless of their formal role on the committee, they will want some control over the decision. They will have a strong need to establish their opinions and influence the decision. They may try to rush the process to the frustration of other committee members and the detriment of getting a decision in your favor.
- Keep these customers in a productive state by maintaining a focus on the overall goals to be achieved by a decision in your favor.

### Amiable Style Customer

- These customers are often more hesitant to speak forcefully about their opinions or concerns. During the decision-making process, they may prefer to hear others' viewpoints before stating their own.
- They can become uncomfortable and reluctant to state any disagreements openly. They may maintain a middle ground or to keep open an option to change their position.
- You can usually avert this behavior by specifically asking if all questions have been answered at each step of the sales conversation, and summarizing the committee's decisions.

### Expressive Style Customer

- They will be very vocal with their opinions during any committee decision-making process.
- If they feel strongly about buying or not buying from you, they might try to influence others on the committee through their emotional appeals or personal relationships with the other committee members.
- During decision-making processes, they may act impulsively without considering all the relevant facts or implications.
- Allow them to *vent* and provide them with persuasive Style-appropriate information about personal incentives and testimonials.



 **SHOW  
VISUAL #29**

AS PER THE SLIDE, WALK THROUGH EACH SOCIAL STYLE WITH RELEVANT EXAMPLES

**SAY** This applies to building relationships virtually.

## MANAGING THE VIRTUAL SALES STAGE

### BUILDING RELATIONSHIPS VIRTUALLY

Below are key tips to build relationships virtually with the respective SOCIAL STYLES. The universal principle *Psychological Reciprocity* applies: give your customer something of value before you ask them for their time. Build the relationship before you need something. Your first interaction with a customer should never be when you are trying to sell something. This is even more important now because the virtual environment is exceptionally noisy with your customer being “pitched at” more than they have ever been before. You can truly differentiate yourself by focusing on giving something to your customers they value. Also, avoid sneak-up sales — a whitepaper that is a thinly disguised promotional piece often loses more sales than it wins.

#### ANALYTICAL STYLE

- Communicate when there is a specific reason to do so
- Share interesting third-party data/research that relates to their job
- Find a way you can help them test their thinking
- Like and support their activities on LinkedIn

#### DRIVING STYLE

- Communicate only when it’s necessary
- Share innovations that can lead to efficiency gains related to their role
- Find a way you can provide value to them that saves time or money but costs them nothing
- Like and support their activities on LinkedIn

#### AMIABLE STYLE

- Periodically, check in to see how they are doing
- Invite them to be part of a group that is related to their role
- Find a way you can help them personally

#### EXPRESSIVE STYLE

- Every now and then ask for their thoughts on their area of expertise
- Invite them to participate in a keynote/podcast/webinar (that is not a testimonial for you in disguise)
- Find a way you can increase their personal brand



**SHOW  
VISUAL #30**

AS PER THE SLIDE, WALK THROUGH EACH SOCIAL STYLE WITH RELEVANT EXAMPLES

SAY This applies to earning trust virtually.

## EARNING TRUST VIRTUALLY

Below are tips to earn trust virtually with the respective Styles. However, the *Say/Do principle* applies — it is vital that there is no gap between what you say you will do for your customers and what you actually do.

### ANALYTICAL STYLE

- Prove that you are capable
- Show the logic behind statements
- Be open
- Focus on quality
- Prepare by learning their organization
- Communicate the pros and cons
- Let the personal relationship develop; don't push it

### DRIVING STYLE

- Show confidence in your abilities
- Do what you say you'll do
- Inform them if their demands cannot be met
- Be candid
- Keep up with their fast pace
- Communicate your understanding of their desired results
- Be efficient with their time

### AMIABLE STYLE

- Share personal information
- Be genuine, sincere and authentic
- Show your commitment to helping them
- Empathize with their needs
- Avoid unnecessary pressure
- Remember the names of their key relationships

### EXPRESSIVE STYLE

- Have a casual, open approach
- Don't unnecessarily conceal your feelings
- Avoid challenging or competing with them
- Show enthusiasm for their ideas, hunches and insights
- Give them your undivided attention
- Talk about non-work topics

 **SHOW  
VISUAL #31**

**SAY** This training program includes a number of additional resources to help you apply to your sales process what you already know about SOCIAL STYLE and Versatility.

 **SHOW  
VISUAL #32**

**SAY** Your Participant Workbook describes ways to apply SOCIAL STYLE and Versatility concepts to each phase of the sales process. Topics covered include:

- Communication
- The Open (Estimating a customer's style, adjusting your behaviors, building rapport)
- The Body (Questioning and pitching)
- The Close (Decision-making, gaining commitment, overcoming resistance and indifference)

 **SHOW  
VISUAL #33**

**SAY** Also included in your Participant Workbook are the "ABCs of Focusing on Your Customer's Style Need." This section provides more detail on a customer's Style behaviors in regard to their approach to others (what behaviors you can expect), how they prefer to use their time and how they like to make buying decisions.

 **SHOW  
VISUAL #34-37**

**SAY** Finally, if you have completed a Social Style assessment and have a profile, you have access to SOCIAL STYLE Navigator®, a micro-learning application designed to help you apply what Style concepts in real-time. It is accessed through TRACOM Learning by entering the same username/password created to begin the survey process.

**AS PER THE SLIDES, WALK THROUGH NAVIGATOR OVERVIEW, ESTIMATOR AND ADVISOR**

**SHOW  
VISUAL #38**

REVIEW THE BULLET POINTS ON THE SLIDE.

**SHOW  
VISUAL #39**

FACILITATOR HAS THE OPTION OF UTILIZING AN ASSESSMENT WITH THIS PROGRAM. IF YOU SO CHOOSE, YOU CAN SELECT FROM THREE PROFILES TO USE:

- VERSATILITY CHECKUP
- SOCIAL STYLE & VERSATILITY MULTI-RATER
- SOCIAL STYLE & VERSATILITY SELF-PERCEPTION

USE THE FOLLOWING VISUALS WHEN DEBRIEFING THE SPECIFIC PROFILE YOU ARE USING FOR THIS PROGRAM.

**SHOW  
VISUALS #40-42**

USE THESE SLIDES IF YOU ARE DEBRIEFING THE VERSATILITY CHECKUP PROFILE.

**SHOW  
VISUALS #43-46**

USE THESE SLIDES IF YOU ARE DEBRIEFING THE SOCIAL STYLE & VERSATILITY MULTI-RATER PROFILE.

**SHOW  
VISUALS #47-50**

USE THESE SLIDES IF YOU ARE DEBRIEFING THE SOCIAL STYLE & VERSATILITY SELF-PERCEPTION PROFILE.

**SHOW  
VISUAL #51**

THANK YOU!





**ADDITIONAL RESOURCES**

The remaining pages of this facilitator guide mirror the Additional Resources section of the Participant Workbook.

# Phases of the Sale

## THE STYLE ADVANTAGE IN THE SALES PROCESS

Applying what you know about SOCIAL STYLE and Versatility to the sales process can give you a significant advantage: the ability to predict how your customer will typically react during the sales call and what you can do to help the customer feel comfortable doing business with you. Of course, being able to make these predictions does not mean you will be 100% accurate. You must always stay in tune with the individual differences among your customers, but you'll have a reference point for knowing your customer and knowing what you can do for them during the sales process.

## THE PHASES OF THE SALES PROCESS

The sales process seldom proceeds as a straight line from opening to presentation to close. It is more likely to start and stop, double-back on itself and change course, depending on the complexity of the product or service you are selling, the cost to the customer, the number of people involved in the purchase decision, etc. For purposes of this discussion, the sales process is broken into three stages:

- **The Open** is the beginning of the sales call when you introduce yourself and establish initial rapport with the customer. Some sales systems call this stage "The Approach." At this point, you may be dealing with an existing customer or a fresh prospect.
- **The Body** is the stage during which you probe for the needs of your customer as those needs relate to your product or service. This is sometimes called fact-finding or probing. During this stage, you also present relevant information about the features and benefits of the product or service you are selling and how they help solve the customer's problems.
- **The Close** is the stage when you summarize the features and benefits of your product or service as they relate to your customer's needs, and then obtain the customer's commitment to your request for action. At this stage, you might obtain or get agreement on a proposal or a formal presentation at a future date.

These three stages are not meant to oversimplify the sales process, but rather to demonstrate how Style concepts can assist you in moving through the process more effectively.

# COMMUNICATION

## E-mail and Voicemail

Professional selling requires numerous customer contacts, many by e-mail and voicemail. Whether these points of contact occur during The Open, The Body, or The Close, the principles for adjusting your Style to accommodate the customer's Style remain the same. By adjusting your communication to fit the Style of your customer, you can ensure that they are receptive to what you say and how you say it.

Adjust your brief communication for the customer.

<p><b>Analytical Style Customer</b></p> <ul style="list-style-type: none"><li>■ Use e-mail to provide important data and supportable facts</li><li>■ Message should be precise and well-structured with a focus on tasks and details</li><li>■ Explain the logic of your thoughts rather than your feelings about things</li><li>■ Clearly state the expected action and let the customer know why it is the appropriate next step</li><li>■ Let the customer know exactly when you will follow up, and then do it</li><li>■ Don't set unnecessarily tight deadlines — give the customer time to think and act</li><li>■ With voicemail, be clear and to the point</li></ul>	<p><b>Driving Style Customer</b></p> <ul style="list-style-type: none"><li>■ Use e-mail in a businesslike manner</li><li>■ Keep the message short and focused</li><li>■ Avoid unnecessary side comments or data</li><li>■ Stick to the key facts, options and the impact they will have on achieving the customer's goals</li><li>■ Avoid telling the customer what they need to do next</li><li>■ Let them know you desire to help them achieve their goal</li><li>■ Ask for their feedback</li><li>■ With voicemail, avoid long messages that they might see as wasting their time</li></ul>
<p><b>Amiable Style Customer</b></p> <ul style="list-style-type: none"><li>■ Be friendly and personable in your wording</li><li>■ Be careful that the tone of your e-mail is not too formal and cannot be "taken the wrong way" by the customer</li><li>■ Let them know you will follow up with them personally via the phone or another meeting if there are significant issues to discuss</li><li>■ With voicemail, keep your tone and inflection friendly and warm</li><li>■ Keep your pace relaxed and avoid fast, non-personal messages that might have you coming across as cold or indifferent</li></ul>	<p><b>Expressive Style Customer</b></p> <ul style="list-style-type: none"><li>■ Be personable in your message</li><li>■ Use adjectives and hyperbole in your message where appropriate to build enthusiasm</li><li>■ Avoid overloading the message with facts and details</li><li>■ Present just one or two key actions that you want this customer to focus on</li><li>■ Reinforce the customer's dreams and aspirations and how you can help realize them</li><li>■ With voicemail, use your tone of voice and inflection to demonstrate your enthusiasm and excitement</li></ul>



## THE OPEN

The Open is critical because you must establish rapport with your customer if you hope to go on with your sales call. Keep in mind the following four points to sell with Style during the Open:

1. Estimate your Customer's Style
2. Adjust Your Behaviors
3. Establish and Maintain Rapport with Style
4. Get a "Fix" on Your Customer

### Estimate your Customer's Style

- **Generate a Style Hypothesis.** Use LinkedIn and e-mails received from the customer to generate a Style Hypothesis, to be confirmed or rejected when you meet the customer.
- **Observe Attire.** This is harder in a virtual environment as many people are working from home and dressing more casually. However, you can still gather some clues: is your customer dressed formally or informally, given the situation? Analytical and Driving Style individuals are more likely to prefer formal interactions, which may be reflected by dressing on the conservative side. Amiable and Expressive Style individuals are more likely to be somewhat informal in their interactions, and this can be reflected in their attire.
- **Observe Their Environment (Home/Office).** Look at the area behind them for clues to their Style. Do they prominently display awards or certificates, or pictures of themselves and others (suggesting an Expressive Style), or do they display "conversation pieces" and "group shot" photos (suggesting an Amiable Style)? In the background, do they have an abundance of references and resources for fact-checking within easy reach (suggesting an Analytical Style), or are just the bare essentials required to do the job on display (suggesting a Driving Style)? Remember, at this point you are like a detective, collecting clues but not yet reaching any conclusions.
- **Observe Say and Do Behaviors.** As you begin, get the customer "on stage" so you can begin to observe their verbal and non-verbal behaviors. You might, for example, ask an open-ended question, such as, "Before we get started, would you tell me about your present situation?"

When you open like this, you are using steps for Improving Sales Effectiveness with Versatility. You are *Controlling Yourself* by giving the customer a chance to talk, and you are getting to *Know Your Customer*.

# THE OPEN: ADJUSTING BEHAVIORS

## Adjust Your Behaviors

After determining your customer’s SOCIAL STYLE, adjust your behaviors as you begin to *Do Something for Your Customer* by accommodating their behavioral preferences. For example, if you observe more Assertive behaviors, proceed at a faster pace; if less Assertive, slow down.

As you begin to make adjustments, watch for reactions from your customer. If their comfort level seems to increase, you have accurately chosen their Style preference. If their comfort level seems to decrease, reassess their Style and try the behavior adjustments for that Style.

<p style="text-align: center;"><b>Analytical Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Be businesslike</li> <li>■ Be disciplined in using the available time</li> <li>■ Let the relationship develop slowly</li> <li>■ Share your process and agenda for the call</li> <li>■ Let them know you are not seeking a quick decision</li> <li>■ Maintain a slow pace</li> <li>■ Give them time to ask questions</li> <li>■ Proceed in a logical and systematic manner</li> <li>■ Appeal to their orientation toward principles and thinking</li> </ul>	<p style="text-align: center;"><b>Driving Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Be businesslike and serious</li> <li>■ Be disciplined in using the time available</li> <li>■ Ask what they want to accomplish in the time available</li> <li>■ Keep on point to the purpose of the meeting</li> <li>■ Let them know you will provide them options to consider</li> <li>■ Don't focus on the relationship unless they initiate the discussion</li> <li>■ Let them know you want to help meet their goals</li> <li>■ Keep the pace moving, to avoid creating tension</li> </ul>
<p style="text-align: center;"><b>Amiable Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Be casual and less formal</li> <li>■ Engage in small talk</li> <li>■ Follow their lead on how to use the time available</li> <li>■ Listen to learn which relationships are important to them</li> <li>■ Maintain a low-key, personal and helpful approach</li> <li>■ Don't rush things unless they suggest faster action</li> </ul>	<p style="text-align: center;"><b>Expressive Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Be casual yet professional</li> <li>■ Be stimulating in your opening, to engage their creativity</li> <li>■ Demonstrate excitement about your product or service</li> <li>■ Keep the pace fast but take time for off-topic discussions</li> <li>■ Reinforce their ideas and opinions</li> <li>■ Be prepared to redirect the discussion if it wanders too far off track</li> <li>■ Follow their lead on how to use the available time</li> </ul>



## THE OPEN: RAPPORT

### Establish and Maintain Rapport With Style

Listen for what's important to the customer, in Style terms. You know that in terms of the *Actions Toward Others* characteristic, principles and thinking are important to the Analytical Style; actions and results are important to the Driving Style; dreams and aspirations to the Expressive Style; and feelings and relationships to the Amiable Style. However, you are not just dealing with a Style, you are dealing with an individual who happens to have a particular Style. Therefore, it is crucial for you to listen for clues from the customer about what principles and thinking are important to them, what actions and results they need to achieve, what dreams and aspirations they wish to realize, and what feelings and relationships they need to maintain.

When you think you understand what is important to the customer, provide feedback to indicate that you support them. For example, you might say to the Analytical Style customer, "I gather that reliable service is important for any product you consider?" Or, for the Amiable Style customer, you might say, "Then I should keep in mind that you'll want Jack's input at some time?" The customer's response to this feedback will indicate whether or not you have correctly understood this individual. Your statement is also another example of *Doing Something for Your Customer* because you have shown that you both understand and support their priorities.

Finally, ascertain that it's okay to continue with the sales call. The customer's attitude must be one of acceptance if you are to continue. For example, you might say to a Driving Style prospect, "I realize you're concerned with improving your productivity, and I can show you some options that will help you do that in an efficient manner. If I may, let me continue by asking you a few questions."

### Get a "Fix" On Your Customer

Use the Open to get a "fix" on your customer. Give the customer some time to get on stage for a while. Then, you can estimate the customer's Style which, in turn, gives you the key to a wealth of Style-related information about the individual. Keep this information in mind as you continue your sales call and relationship with your customer.

# THE BODY: QUESTIONING

## Questioning With Style

Selling with Style means that your approach to questioning depends on your customer's Style's key characteristics. Questioning techniques you can use with each of the four Styles:

<h3>Analytical Style Customer</h3> <ul style="list-style-type: none"><li>■ Take time to ask questions</li><li>■ Encourage a two-way conversation; give the customer a chance to question you</li><li>■ Be prepared to answer questions in a specific, accurate and organized manner</li><li>■ If you don't have the information, commit to getting it to them and then do it</li><li>■ Listen to their questions for hints about what is important to this person</li><li>■ Don't make statements about your solutions that are overly general — accuracy is best</li><li>■ Present your questions in a logical sequence</li></ul>	<h3>Driving Style Customer</h3> <ul style="list-style-type: none"><li>■ Make the points about your solution in a simple, direct and efficient manner</li><li>■ Don't overdo your questions so that it feels like an interrogation</li><li>■ Expect direct and specific questions</li><li>■ Let the customer feel they have some control over the discussion</li><li>■ Be aware of the time</li><li>■ Begin with open questions that enable the customer to set the direction of the discussion</li><li>■ Avoid too many questions that can be answered by a "yes" or "no"</li></ul>
<h3>Amiable Style Customer</h3> <ul style="list-style-type: none"><li>■ Avoid using too many close-ended questions that could cause the customer to feel interrogated</li><li>■ Ask general questions that encourage the customer to talk</li><li>■ Listen for hints about key relationships that are important to the customer</li><li>■ Avoid being too formal and data-oriented with the customer</li><li>■ Recognize the importance they place on feelings and relationships</li><li>■ Be on the lookout for behavior that might indicate the customer is acquiescing rather than agreeing with your comments</li><li>■ Don't promise more than you can deliver</li></ul>	<h3>Expressive Style Customer</h3> <ul style="list-style-type: none"><li>■ Start with general questions that encourage the customer to talk</li><li>■ Allow some time for sharing personal topics</li><li>■ If the conversation wanders too far off-topic, use close-ended questions to return the customer to the purpose of the call</li><li>■ Reinforce the customer's favorable responses about needs that your product or service can meet</li><li>■ Let the customer know about well-known individuals or organizations that use your solutions</li><li>■ Look for hints about what is exciting and innovative to your customer and reinforce how your solution can help them achieve their dreams and aspirations</li></ul>



## THE BODY: “PITCHING”

### “Pitch” With Style

Your proposal should summarize the benefits and features of your product or service and verify that they meet your customer’s needs, as you understand them. Here, all Styles have similar concerns about your product or service, but you should vary how you make your proposal according to Style preferences.

<p style="text-align: center;"><b>Analytical Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Be well-prepared and organized in your proposal for action</li> <li>■ Be accurate and don’t overstate what you can do</li> <li>■ Present the relevant information based on what the customer indicated was important</li> <li>■ Be prepared to back up your information with facts, figures and data</li> <li>■ Don’t rely on testimonials or opinions to make your points</li> <li>■ Share both the pros and cons of your recommendation</li> <li>■ Let the customer know in what ways you have minimized any risk they would take if they buy from you</li> </ul>	<p style="text-align: center;"><b>Driving Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Be efficient with your time</li> <li>■ Keep your proposal short and to the point</li> <li>■ Focus on what your product or service will help the customer accomplish</li> <li>■ Provide facts and logic to support your proposal but keep the main points simple</li> <li>■ Be prepared to provide more details if requested</li> <li>■ Quickly get to the bottom-line need and show how you can meet that need</li> </ul>
<p style="text-align: center;"><b>Amiable Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Take time to be agreeable</li> <li>■ Keep the discussion of your proposed solution more casual and informal</li> <li>■ Watch your pacing; don’t try to rush the conversation</li> <li>■ Provide personal guarantees and assurances that the decision to buy has little risk</li> <li>■ Let the customer know why your solution is personally important to them</li> <li>■ Let the customer know why your solution will be acceptable to others who are important to your customer</li> </ul>	<p style="text-align: center;"><b>Expressive Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Make your proposal stimulating by presenting the big picture of your solution</li> <li>■ Avoid excessive details</li> <li>■ Use third-party testimonials</li> <li>■ Give examples of the recognition others have received when they bought your product or service</li> <li>■ Keep the discussion moving forward and avoid letting it get sidetracked on other topics</li> <li>■ Be inspiring but avoid trying to “outshine” your customer</li> </ul>



# THE CLOSE: DECISION

## Encourage a Decision

Help your customer feel comfortable buying from you by focusing on their preferences with regard to making decisions. By being sensitive to Style preferences, you encourage your customer to commit to a decision that they will be confident in making.

<h3>Analytical Style Customer</h3> <ul style="list-style-type: none"><li>■ Present the pros and cons of your recommendations</li><li>■ Emphasize what you will do to minimize any drawbacks of your solution</li><li>■ Provide the customer with the opportunity to conclude that the decision to buy is the right or appropriate one</li><li>■ Allow ample time for the customer to review the provided evidence of your solutions' capacity for solving their issue</li><li>■ Avoid sounding like you are pressing for a quick decision</li></ul>	<h3>Driving Style Customer</h3> <ul style="list-style-type: none"><li>■ Present the choices, alternatives and options available to the customer</li><li>■ Provide focused information about each option</li><li>■ Keep the discussion businesslike</li><li>■ Avoid making your relationship with the customer part of their buying decision</li><li>■ Keep the pace of the call moving</li><li>■ Let the customer feel they are in control of the decision-making process and that you are only trying to facilitate their decision by providing options</li></ul>
<h3>Amiable Style Customer</h3> <ul style="list-style-type: none"><li>■ Focus on why the decision to accept your recommendation is a good one</li><li>■ Let them know why a decision in your favor will be acceptable to others who are important to the customer</li><li>■ Provide personal assurances and guarantees that you will stand behind your product or service</li><li>■ Keep the discussion informal and friendly and not overly detailed</li><li>■ Minimize any sense of risk involved in the decision by letting the customer know what you will do to ensure success</li><li>■ Use third-party testimonials as necessary to let the customer know that others have benefited from your solution</li></ul>	<h3>Expressive Style Customer</h3> <ul style="list-style-type: none"><li>■ Tie the decision to their sense for excitement</li><li>■ Provide them with special, immediate and personal incentives that will put them in a favorable light if they decide on your recommendation</li><li>■ Let the customer know how accepting your recommendation will enhance their reputation as an innovator</li><li>■ Keep the pace moving</li><li>■ Keep the discussion on track</li><li>■ Let the customer feel they have made a good deal</li></ul>



## THE CLOSE: COMMITMENT

### Ask for a Commitment

Formally confirm the sale by asking for the customer's decision to buy. It is critical to ensure that your customer is indeed making a commitment to buy. Realize that some Styles may be a bit deceptive, giving you mixed messages, sounding like they have given you a commitment when they have not.

<p style="text-align: center;"><b>Analytical Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Make the close the next logical step in the sales process</li> <li>■ Allow them time to decide</li> <li>■ Avoid giving too many options which may slow down the decision</li> <li>■ Probe to see if they are ready to make the decision now</li> <li>■ If they are not ready, probe to see if they need more information and/or to find out when you might expect their decision</li> <li>■ When the decision is made, be sure to review the details and make sure everything is specified</li> <li>■ Deliver on what you promised; don't promise anything you can't deliver</li> </ul>	<p style="text-align: center;"><b>Driving Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Be direct in asking for their commitment</li> <li>■ Provide them with several options from which to decide</li> <li>■ Don't be afraid to ask for their decision</li> <li>■ If they decide unfavorably, ask them what would need to happen for them to reconsider your solution</li> <li>■ When the agreement is reached, deliver on your commitment in a timely and efficient manner</li> <li>■ Deliver what you promised</li> </ul>
<p style="text-align: center;"><b>Amiable Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Make the decision request less direct and conversational</li> <li>■ Ask them if they are ready to proceed; if not, ask if they need more time to check with others</li> <li>■ Offer to provide additional information for others and even to meet with them if they prefer</li> <li>■ Don't press for a quick decision or you may get a "yes" that is actually an attempt to avoid a confrontation, which they will later cancel</li> <li>■ Make sure they are comfortable with their decision and their relationship with you</li> <li>■ Check back after the sale to let them know you are still interested in them and are supporting their decision to do business with you</li> </ul>	<p style="text-align: center;"><b>Expressive Style Customer</b></p> <ul style="list-style-type: none"> <li>■ Make the decision an exciting opportunity for personal gain by emphasizing the impact it could have on their future or reputation</li> <li>■ Don't be afraid to press for a decision but let them make it</li> <li>■ When you get commitment, follow up with all relevant details in writing</li> <li>■ Remember, Expressive Style individuals can often forget or overlook the details, so help them out by being clear and precise</li> <li>■ Deliver on what you promise and remember failure to do so may be viewed as a personal insult</li> </ul>

# THE CLOSE: RESISTANCE

## Dealing with Resistance

You can make productive use of SOCIAL STYLE and Versatility concepts if the customer is displaying some resistance to the sale. When this occurs, you first need to ask probing questions to learn the source of the resistance.

<p><b>Analytical Style Customer</b></p> <ul style="list-style-type: none"><li>■ The Analytical Style customer might display resistance by stating objections in the form of questions that are difficult to answer or by offering you little or no feedback. They may challenge your research or product specifications. This customer might show very stiff or formal body movements and voice inflections.</li><li>■ Solve: Probe appropriately to uncover the source of resistance. For example, "That is an interesting question; what would that information resolve for you?"</li></ul>	<p><b>Driving Style Customer</b></p> <ul style="list-style-type: none"><li>■ The Driving Style customer might display resistance by openly stating their objection, becoming impatient, or attempting to take charge of or conclude the sales conversation.</li><li>■ Solve: Probe to isolate the specific problem. Phrase your questions to relate to the Driving Style customer's preferences. For example, "We've been covering a lot of details about our solution for the past few minutes. Do you want more or should we move on?"</li></ul>
<p><b>Amiable Style Customer</b></p> <ul style="list-style-type: none"><li>■ The Amiable Style customer might display resistance by postponing a decision, expressing doubt in a questioning way, or explaining that they want to talk with someone else about your proposal.</li><li>■ Solve: Probe to uncover the source of resistance in a way that is appropriate to the Amiable Style customer's preferences. For example, "Do you have concerns about your colleagues' reactions if you make a decision around using our solution?"</li></ul>	<p><b>Expressive Style Customer</b></p> <ul style="list-style-type: none"><li>■ The Expressive Style customer might display resistance by openly stating what they don't like about you, your ideas, or your product or service. They might try to save the relationship, however, by dismissing the topic of your sales call while carrying on a lively conversation or making a joke or sarcastic remark about your product or service. Superficially, the sales call has the appearance of moving forward but is actually stalled.</li><li>■ Solve: Probe for the source of the problem. For example, "From your comment, it seems you may be feeling that our solution is not a good fit for you. Could you please tell me more about why you feel this way?"</li></ul>



## THE CLOSE: INDIFFERENCE

### Dealing with Indifference

You can predict fairly accurately how a customer will display indifference based on what you know about the individual's Style and respond to it based on the tips below.

<p style="text-align: center;"><b>Analytical Style Customer</b></p> <ul style="list-style-type: none"> <li>■ The Analytical Style customer may display indifference by asking questions out of curiosity or to collect information, but making no move toward any kind of decision. The customer may remain cooperative, but will tend to show very formal and controlled behavior. This indifferent customer will tend to offer you little or no information to respond to.</li> <li>■ Solve: Probe in a way that will encourage the customer to tell you more. For example, "If I understand you correctly, your current provider has always delivered an acceptable quality level, is that right?"</li> </ul>	<p style="text-align: center;"><b>Driving Style Customer</b></p> <ul style="list-style-type: none"> <li>■ The Driving Style customer may display indifference by giving you little or no feedback, not listening, or attending to other matters.</li> <li>■ Solve: Probe for the cause of this attitude, using what you know about their Style preferences. For example, "Are you concerned about any fall off in productivity if you switch providers?"</li> </ul>
<p style="text-align: center;"><b>Amiable Style Customer</b></p> <ul style="list-style-type: none"> <li>■ The Amiable Style customer may display indifference by remaining friendly, asking only "polite" questions about your product or service, or wandering off the topic of the sales call. The customer might make statements like, "I just don't know at this time," "I'm not sure right now," or "Maybe later."</li> <li>■ Solve: Probe to find out more. For example, "What could your current provider do for you that would make your job easier?"</li> </ul>	<p style="text-align: center;"><b>Expressive Style Customer</b></p> <ul style="list-style-type: none"> <li>■ The Expressive Style customer may display indifference by becoming undisciplined in the use of time. They might keep the conversation going, but refuse to stay on the point of the call. Often, they will simply say they are indifferent.</li> <li>■ Solve: Probe to find out the source of the indifference. For example, "If you could improve your present solution in any way, what would you do?"</li> </ul>

# The ABCs of Focusing on Your Customer's Style Needs

Awareness of three key customer behaviors can give you great insight into how best to support the customer's Style Need. These customer behaviors are:

- A. Actions toward others**
- B. Best use of time**
- C. Customized approach to decision making**

Each SOCIAL STYLE typically acts towards others, uses time, and approaches decision making in characteristic and predictable ways. By recognizing the behaviors and applying Versatility concepts consistent with your behavioral style, you can help make your interactions with your customers mutually productive.



ACTIONS  
TOWARD  
OTHERS

A



BEST  
USE OF  
TIME

B



CUSTOMIZED  
APPROACH TO  
DECISION MAKING

C



## Driving Style



Customers with a **Driving Style** are typically more oriented toward results and tasks than they are toward relationships and people. As a result, they may appear uncommunicative, cool, formal, independent and competitive in relationships with others.

A Driving Style customer tends to initiate clear action. However, the personal reasons for such action may not be obvious to you because they seldom see a need to share personal motives or feelings. Driving Style customers tend to focus on efficiency or productivity rather than devoting time and attention to casual relationships.

Thus, you may feel that you really don't get to know your Driving Style customers on a close, personal basis. In early contacts with a them, you may not consider the situation warm and friendly. In discussions about people, they will seem to display an attitude that suggests they have learned how to work with others only because they must in order to achieve their objectives, not because they enjoy engaging with people on a personal basis. However, these Driving Style customers often can appear very pleasant and even charming — on their terms.

You will often see your Driving Style customer as a person who exercises power and control over their environment, both in terms of people and the physical surroundings. In fact, this individual may appear to treat people as objects rather than individuals. Keep in mind, however, that although Driving Style customers may control how they share emotions and feelings,

this does not mean they don't have them. They simply prefer not to readily display how they feel.

To deal most effectively with the Driving Style customer, take the following actions:

- Plan a sales strategy that will support their conclusions and the actions needed to implement those conclusions.
- Initially, don't try to change their mind with a direct approach; instead, discover their objectives and find ways to support and assist with these objectives.
- In your discussions with your Driving Style customer, plan to ask questions about specifics. These customers want to get a job done. Find out what situation or conditions would exist if this individual had their way. It's not necessary to discuss what the person wants personally. Instead, focus on an objective they have identified as important.
- Keep the sales relationship businesslike. It is not necessary to build a personal relationship unless the customer indicates that's part of the objective. You should not anticipate friendship as a condition for a good sales relationship.
- Look for specifics you can provide to assist with those stated objectives without assuming anything or second-guessing what the Driving Style customer really wants.
- Stick with "what" and "when" questions. Don't get sidetracked in a discussion of "how," "who," or "why" questions. Move directly and quickly to the "what" specifics.

## Driving Style

You will use different tactics to move a Driving Style customer forward, depending on if you agree or disagree with them.

- If you agree with the position of the Driving Style customer, support the results they want rather than the individual personally. Put the emphasis more on “I’m for the results, outcomes, and goals that you want” rather than “I’m looking out for you.” In addition, indicate all the things you can and would like to do to achieve the objective. Then ask the Driving Style customer which of these actions they would prefer you take.

- If you disagree with the specifics or objectives of the Driving Style customer, take issue with the facts, not the person. Have the facts and logic on your side and avoid getting lost in the discussion of philosophies or implications. Avoid taking issue with the them as a person. If you can’t agree with any of the conclusions they want to achieve, tell them “why” you can’t agree and indicate “what” actions you see as realistic alternatives.

### TIP:

Don’t hesitate to be direct in communicating with the Driving Style Customer. Keep to the point, be businesslike and avoid being overly personal. When it comes time for a decision, ask them how they wish to proceed.



BEST  
USE OF  
TIME

B

Don’t take any actions that the Driving Style customer might interpret as a waste of time. Get to the point and stay on target. Watch for clues that they want you to move on quickly; make your point in a simple and direct manner. Use your time efficiently. If your customer schedules a 30-minute appointment with you, you should anticipate the call ending on time or even a bit early. If it is necessary to continue beyond the agreed upon timeframe, be sure to ask their permission to extend the meeting or ask to schedule another appointment. Driving Style customers appreciate people who recognize the importance of sticking to a schedule.

If you appear interested in using a Driving Style customer’s time to build a relationship, they can become impatient. These customers typically prefer a salesperson who is disciplined in the use of time and who is able to move quickly in a business-like manner. The farther your behavior appears to get from that objective, the more restless they become about your efforts to sell to them. It also follows that as you use your time efficiently, your relationship with them will grow. While not becoming as personally warm and approachable as individuals with Expressive or Amiable Styles, you will frequently discover signs of a Driving Style customer thawing out and warming up after an efficient handling of the sales call.





## Driving Style

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### CUSTOMIZED APPROACH TO DECISION MAKING



In dealing with a Driving Style customer, the best way to influence a decision comes about when you provide alternatives and options with facts and data. Remember, the Driving Style customer likes to make their own decisions, enjoys having power, and doesn't like being told what to do or not to do. In dealing with them, you will enjoy greater success by providing alternatives and choices from which the customer may select, rather than insisting on a specific conclusion. In other words, never tell a Driving Style customer what to do; provide options. And then let the customer decide!

In addition, try to provide facts and data about the probability for the success or effectiveness of the various options. You can expect a Driving Style customer to give serious consideration to the options with good probabilities; keep in mind that since they can accept risks, they may, on occasion, want to fly in the face of the best probabilities. When the customer selects the long shot, you can expect an explanation as to why that alternative was selected. In most instances, it will be consistent with previous conclusions based on a set of facts different from those you presented. Thus, you may need to get additional facts to strengthen your case if you want to persist in influencing the Driving Style customer's decision.

## Expressive Style



The **Expressive Style** customer appears communicative, fun, exciting, warm, approachable and competitive. They often involve you and others with their feelings and thoughts. Their actions suggest they want you as a friend, but in the role of a follower and personal supporter of their dreams rather than as someone who might compete with them. These customers consider power and politics important because they can enhance personal recognition and help recruit supporters to the cause. While relationships and people matter to them, these relationships may lack depth and be short-lived.

To deal most effectively with an Expressive Style customer:

- Plan a sales strategy that will provide support for dreams and intuitions.
- Plan to ask questions about the customer's opinions and future goals. Have them tell you what others need to do to achieve objectives. Then, let them tell you what they are personally doing to reach those objectives. Thus, people and their future goals become the subject of this discussion rather than just results in terms of cold, factual, present realities.
- The Expressive Style customer tends to form an opinion on almost everything. Look for points of agreement and give them credit for their good ideas. Indicate what you can and will do to implement the ideas you agree upon. Ask them what you can do personally to help.

- Be sure you agree on specifics. Avoid the temptation to proceed on a warm feeling that everything will somehow work out for the best. Take the initiative to formally summarize your discussions in writing. Let the Expressive Style customer know you will provide a summary even if they may want to make a few alterations. Consolidate the new information and move on. This is a subtle but effective way to help them stay on track with you and can reduce the amount of time it takes you to move the sale to closure.

- Spend time exploring mutually stimulating ideas and possible solutions. At this point, don't rush a conversation; instead, have a discussion that builds ideas together. Let the customer take as much of the credit for the ideas developed as they care to. Remember, individuals with an Expressive Style are creative, fun, and exciting. As they build their vision and ideas, your task is to help make their dreams a reality!

You will use different tactics to move an Expressive Style customer forward, depending on if you agree or disagree with them:

- If you agree, you should work out specific details such as "who," "why," "what" and "how." The Expressive Style customer will show little interest in how agreed-upon objectives are reached and usually has limited interest in details. Thus, you should offer to summarize the discussion and suggest ways to implement the actions you have both settled upon. Your willingness to take the initiative to handle details will strengthen your relationship with the customer and speed up your selling process.
- If you disagree, avoid arguing with the Expressive Style customer because they feel a strong need to win an argument. Look for alternate solutions that you can both share with excitement. Avoid competing with the Expressive Style customer, even when their behavior seems to encourage competition.



## Expressive Style



Expressive Style customers tend to move quickly in their actions, with less discipline about time. You should expect to move rapidly into a social interaction. Try to be stimulating by developing and presenting clear pictures. Motivational stories about people or situations that support ideas in a positive way will help. But if you provide this motivational stimulation, you may find that the meeting ends on an up-tone without ever arriving at any specifically agreed-upon action or commitment. So, be sure to maintain the point of your meeting.

The Expressive Style customer acts quickly and can change a course of action rapidly. Thus, you should develop and present a clear picture for agreement about the time tables for action and on the specifics of “who,” “what” and “how.” The customer will not show great interest or concern with these kinds of specifics, so you will probably have to take the initiative in maintaining the

relationship on a friendly and enthusiastic basis while sharing the details. It can help in these instances for you to put the specifics in writing. If you don’t agree on the details, don’t be surprised or disappointed if the customer changes signals on you. The ability to change is part of their Style, and you should prepare for it. And remember, a 30-minute appointment with an Expressive Style customer is only a guideline from their point of view. If they get excited about the content of the discussion, you can find a meeting going significantly longer and flowing in many directions. Should you need to end a meeting, do so with respect and let them know how much you would like to continue the discussion — and be sure to set up another appointment before you leave.

### TIP:

Expressive Style customers may communicate excitement about many issues. Make sure you use your action-taking skills to determine how critical an issue really is before proceeding. These skills will also enable you to effectively guide the discussion.

## Expressive Style

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CUSTOMIZED  
APPROACH TO  
DECISION MAKING



The Expressive Style customer tends to take risks, basing those risks on personal opinion. The opinions of people who are considered important, prominent or successful by this customer will often mean more in the decision-making process than all of the facts and logic you might introduce. Whenever possible, provide testimony from prominent persons and organizations that support the opinions you want to use. Also, provide unique features and exciting ideas when appropriate. In addition, these customers tend to respond to special, immediate and extra incentives for their willingness to take risks and move rapidly in making a decision. Some personal, social recognition or prestige might provide the extra incentive necessary for making the decision to buy. And remember, always allow the Expressive Style customer to take a risk on their personal opinions.



## Amiable Style



ACTIONS  
TOWARD  
OTHERS

A

The **Amiable Style** is the most people-oriented of the Styles. To the Amiable Style customer, people count as people rather than just as ways to achieve results or political influence. Avoid competition in relationships with them and instead cooperate as a means of getting things done. Typically, these customers will seek your recommendations and personal support. This connection tends to place a greater responsibility on you before making a recommendation to an Amiable Style customer. They achieve objectives with people through understanding and mutual respect rather than force and authority. These customers will readily accept advice from a friendly, understanding salesperson who treats them as a real individual. They do not seek power over others as an important personal objective.

To deal effectively with an Amiable Style customer, you should:

- Plan a sales strategy that supports this customer's feelings and relationships with others.
- Take the early initiative to show your personal interest in them as a person. Spend the necessary time to deal with their personal situation, marital status, family hobbies and interests, and attempt to find an area of common involvement where you can support them in terms of their personal needs.

- Support the key relationships they have with others. Find out who the customer feels is important and may influence the purchase decision, even if they are not formally involved in the purchase decision but whose input they may want. Be aware of any source of doubt, fear, or insecurity in the Amiable Style customer.

- If you agree easily on an objective, look for possible areas of early dissatisfaction before taking any joint action. Consider the following checkpoint: "It's great we agree; however, are there any areas where we might possibly disagree in the future?" Encourage personal discussion.

- Establish a cooperative effort with the Amiable Style customer. They want to relate to working with you on a joint basis as a means of achieving their personal objectives. However, this customer may understate personal goals, so you may need to clarify the specifics in terms of "why," "who," "how" and "what" the person expects to achieve. Avoid the temptation to overstate what you can realistically do together to achieve the objective, or you may create difficulties in a long-term sales relationship.

## Amiable Style

You will use different tactics to move an Amiable Style customer forward, depending on if you agree or disagree with them:

- If you agree, indicate all the things you can and will do to support agreed-upon personal objectives. Define clearly what you will contribute personally to the joint effort and what the customer will contribute. If necessary put this in writing, so they will not expect too much, and so you will remember your commitment.
- If you disagree with the Amiable Style customer, encourage a discussion on personal opinions and feelings while avoiding a logical debate about facts. If you disagree too openly, expect hurt feelings and a personal reason for the disagreement.

### TIP:

Probably the fastest way to alienate an Amiable Style customer is to provide assurances and guarantees and then not fulfill your commitment, so avoid overstating the commitments you can make.



BEST  
USE OF  
TIME

B

The Amiable Style customer tends to move slowly with less time discipline. In some cases, you might feel you can push your sales efforts and achieve your objectives rather quickly. Although you may be able to force them to respond quickly to your objectives, this typically backfires at a later date if the customer didn't really participate. Should this happen, they tend to resist implementation of your forcibly imposed objectives.

Even though the Amiable Style customer makes the initial contact easy, you will achieve more lasting results if you move slowly and spend time in a casual and informal manner. Demonstrate more than once that you are, in truth, an agreeable individual who is genuinely interested in them as a person. When you display the willingness to spend some time, listen, and respond to what is said, you will get a clearer picture of their objectives. In addition, the customer will begin to share feelings with you of both a negative and positive nature.

Be candid and open. Be careful, however, that the talking and socializing does not get so important that it's difficult to get back to the subject of the sales call. You should allow time for such a conversation and have your objective clearly in mind. At an appropriate point, bring the conversation to a conclusion. Then, prove your sincerity with reliable follow up, and plan to build a relationship with the customer over time.



## Amiable Style

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CUSTOMIZED  
APPROACH TO  
DECISION MAKING



Amiable Style customers seek to avoid risks, especially those risks that might harm relationships. They tend to use personal opinions in arriving at decisions. If you take the time to develop an agreeable relationship with the customer, then influencing the decision-making process should not be too difficult. Essentially, the Amiable Style customer wants you to make specific recommendations and give guarantees that minimize risk.

These customers will want personal assurances that you will stand behind your product or service. In contrast to the Driving Style, Amiable Style customers really don't want options and probabilities. Instead, they seek a clear, specific solution with maximum guarantees and assurances that this is the right decision, with no need to look at other options. Typically, the need to feel safe in the decision-making process gets high priority from them. This can entail a rather lengthy selling cycle if the customer feels a need to involve others in the decision process.



## Analytical Style



Analytical Style customers appear uncommunicative, distant, formal, and independent. These customers are cooperative in their actions, as long as they have some freedom to organize their own efforts. They tend to be cautious about extending friendships or personal warmth, and initially will be more concerned with how things can get done without the need for personal involvements. Paradoxically, people and friendships may be very important, even though they may not seem to be in initial contacts. These customers don't want to rush into a relationship until they understand how the relationship can be managed, so no one will get hurt by the degree of involvement or personal demand. This customer also has a "show me" attitude. They tend to be suspicious of power and will avoid becoming involved with others who have power or leverage until they see a system or predictable pattern in the way power is used.

To deal effectively with the Analytical Style customer you need to:

- Show that you will support their principles and thoughtful approach. The goal should be to show that you understand the problem without being too quick with any solution.
- Reinforce deliberate decisions. Analytical Style customers seek assurance that their decisions are "right" and that their actions can't backfire or clash with other activities. Support this need by contributing to their data-gathering efforts.

- Stick with specifics and deliver what you promise. The Analytical Style customer will observe your approach with the critical expectation that you will tend to oversell yourself or overstate what you can or will do. Providing detail and following through can help to counteract their expectation. Also, list the pros and cons of any suggestion or plan you make. Your awareness of the disadvantages of the product or service you sell will tend to build your credibility.

- Take the initiative to demonstrate through actions, rather than words, that you really can help, and then make a specific, organized contribution to the customer's efforts. Do something like preparing a written presentation of recommendations you would like them to consider.

- Keep your approach realistic and business-oriented. It should be well thought-out, based on common sense and not too flashy. The Analytical Style customer demonstrates a strong time discipline coupled with a slow pace to action. Therefore, you should allow them time to reflect on the situation.

## Analytical Style

You will use different tactics to move an Analytical Style customer forward, depending on if you agree or disagree with them:

■ If you agree with the position of the customer, support their need to be right rather than the individual personally. Put the emphasis more on the data and logic of the outcomes and facts that you have rather than, “I’m looking out for you.” In addition, define the data that supports their efforts to gather sufficient information to make a decision. Then ask them what additional information they would like to have in order to facilitate a decision.

■ If you disagree, look for the possibility that you might not have demonstrated a mastery of the facts and data, or have communicated your case clearly and concisely enough for your customer. Find a way to earn credibility by making an organized, systematic presentation of your position. A letter or written outline might help. Also remember that when you work with an Analytical Style customer, it is very important to follow through on your commitments and do what you said you would do.

### TIP:

Analytical Style customers will evaluate you and your solution by the relevance and accuracy of the information you provide them. Avoid providing data that is not relevant to their issues. Follow through and deliver what you promise. Don’t overpromise, as it will lower your credibility.



BEST  
USE OF  
TIME

B

The Analytical Style customer has a strong time discipline, coupled with a slow pace to action. They make and take the time to carefully review all facts and data available. So be patient and be persistent. You can’t rush an Analytical Style customer, even when you have established a relationship. These customers move with deliberateness. However, once you have a commitment, they will do everything they have stated. The hard-sell approach typically alienates these customers.

Prepare well prior to a sales call with an Analytical Style customer, rather than trying to think on your feet or impress them with your social skills or personal charm.

They will want to know if you are really knowledgeable or if you are just talking off the top of your head. You’ve already learned that they are likely to be uncommunicative, cool and distant, but you should also know that they can be cooperative. If you move too quickly, their slow actions may appear to be uncooperative; however, that’s likely to be more of a function of your impatience than of a true sign of difficult behavior.

## Analytical Style



Analytical Style customers tend to make decisions based on facts and verifiable information, and they tend to avoid risks. You must provide proof that what you say is backed by relevant facts. This evidence should be solid, tangible, practical and realistic — not an opinion. In addition, the customer requires assurance that any decision made today will be valid in the future. Guarantees and warranties are important. Provide back-up information and put provable benefits in writing. Realize, however, that they will continue to display caution and deliberateness.

If you don't make the progress you desire with an Analytical Style customer, dig out additional information or facts that will meet their needs. Demonstrate that you know how to get information and present it to them in a systematic manner. It's performance that counts, and your ability to get accurate facts and provide them according to a predictable schedule will serve to build your sales relationship with this customer.

Indicate all the things you can and will do to support agreed-upon conclusions. Be systematic about making your "can do" and "will do" contributions on the schedule you mutually establish, and stay with it, or let the customer know when and why you may deviate from the schedule. Demonstrate

actions that assure no surprises between the two of you. Your example does more to build the relationship than anything you can say. Give the Analytical Style customer time to verify the reliability of your actions.

Avoid the temptation to think you can influence the decision early in your contact by providing testimonies from other people or through special personal appeals or incentives. Avoid gimmicks or clever, quick manipulations that you think might help in getting a fast decision. Live with the fact that it may take some time for the Analytical Style customer to reach a decision to buy. However, when you get it, you can count on a lasting decision that will form a basis for future sales relationships.



# SOCIAL STYLE Navigator®

To help extend and reinforce lessons learned beyond the classroom, all participants who have taken a SOCIAL STYLE training course have free and unlimited access to SOCIAL STYLE Navigator®, a deep-featured resource that supports specific learning objectives and is accessible on a phone, tablet or computer.

The SOCIAL STYLE Navigator includes:

- **SOCIAL STYLE Advisor**, which helps you apply Style and Versatility concepts in the workplace. Topics are organized into Managerial, Sales and Individual categories to provide specific advice for working with people of all four SOCIAL STYLEs.
- **SOCIAL STYLE Estimator**, which is a brief 14-question survey to help you quickly and easily estimate the Styles of others.
- **eLearning Modules** focused on Style and Versatility in three topic areas: Working in Teams, Coaching and Managing Conflict.

If you have an online profile report in TRACOM's system, you can preview this powerful tool by going to [tracomlearning.com](http://tracomlearning.com) and logging in with your TRACOM Username and Password. SOCIAL STYLE Navigator is available under Application Tools on the Reports tab.