



Extended DISC®

# Level Two Advanced

Course Workbook

# Refreshing Extended DISC®

## What are Extended DISC® Assessments

Extended DISC® Assessments are designed to provide users with practical action plans to enhance individual, team, and organisational performance. Extended DISC® Assessments provide customised and powerful reports on individuals, teams and organisations. Extended DISC® is much more than a set of assessment tools. Although assessments have proven to be very beneficial in numerous applications, assessments alone have a limited impact on performance. It is only when the information from the assessments is applied in practice that the value is created.

Extended DISC® can be compared to a road map. If we do not know where we are, reaching our destination becomes a challenge. However, merely knowing our current location is not much better, if we have no idea which direction to proceed in. Maps provide us with a frame of reference, enabling us to make intelligent decisions on where we need to go.

Extended DISC® provides us with a framework to help make the necessary adjustments at individual, team and organisational levels to achieve our objectives. The framework is easy to learn and to use and it enhances performance.

Extended DISC® is based on the premise that there are no good or bad people – there are only different people. We all have the opportunity to improve ourselves by learning to recognise our personalities' strengths and weaknesses, by accepting their existence, and by searching for new ways to capitalise on them.

Extended DISC® Theory is based on certain graphical elements that make the different assessments work together. The basic elements are:

- The Four Quadrant (4Q) Model
- The Extended DISC® Diamond
- Extended DISC® Profiles
- Extended DISC® Percentages

Note: Extended DISC® Assessments are not affiliated with any DISC assessment tools that have previously been available. They are independent assessments and are only available through Extended DISC® International. Extended DISC® Assessments are the most advanced behavioural assessment system currently available.

# Refreshing Extended DISC®

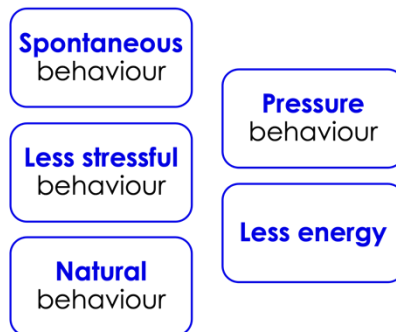
## What Our Reports Measure

Extended DISC® identifies and reports on conscious and unconscious behaviour. This includes adjusted or desired behaviour and spontaneous, more natural behaviour that requires less energy.

**Conscious behaviour**  
Profile I – Perceived Need to Adjust



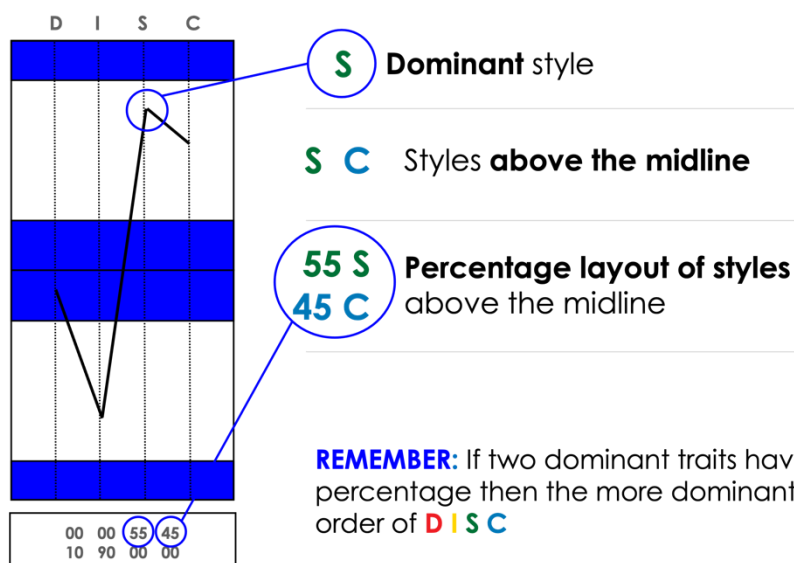
**Unconscious behaviour**  
Profile II – Who We Are



## Finding the DISC Styles

- Step One – find the most dominant style. If two traits have the same percentage then the more dominant trait is read in order of D, I, S and C.
- Step Two – identify other styles above the midline.
- Step Three – read and take note of the percentage layout of the styles

**Your DISC style is:**



# Refreshing Extended DISC®

## The Four Quadrant Model

### Horizontal Axis

#### Fast-Paced and Intuitive

- Active-paced: They tend to make rapid decisions, talk quickly and use body language and exuberant physical actions to aid communication.
- Intuitive: They tend to use their gut feeling or intuition to feel their way through an issue even if they haven't experienced it before.

#### Reserved-Paced and Sensing

- Reserved-paced: They can be slow to make decisions, talk relatively slowly and calmly. Their body language also reflects their reserved pace.
- Sensing: They tend to analyse using their senses (touch, smell, taste, sight and hearing); they prefer to spend time making sure every action is the correct action.

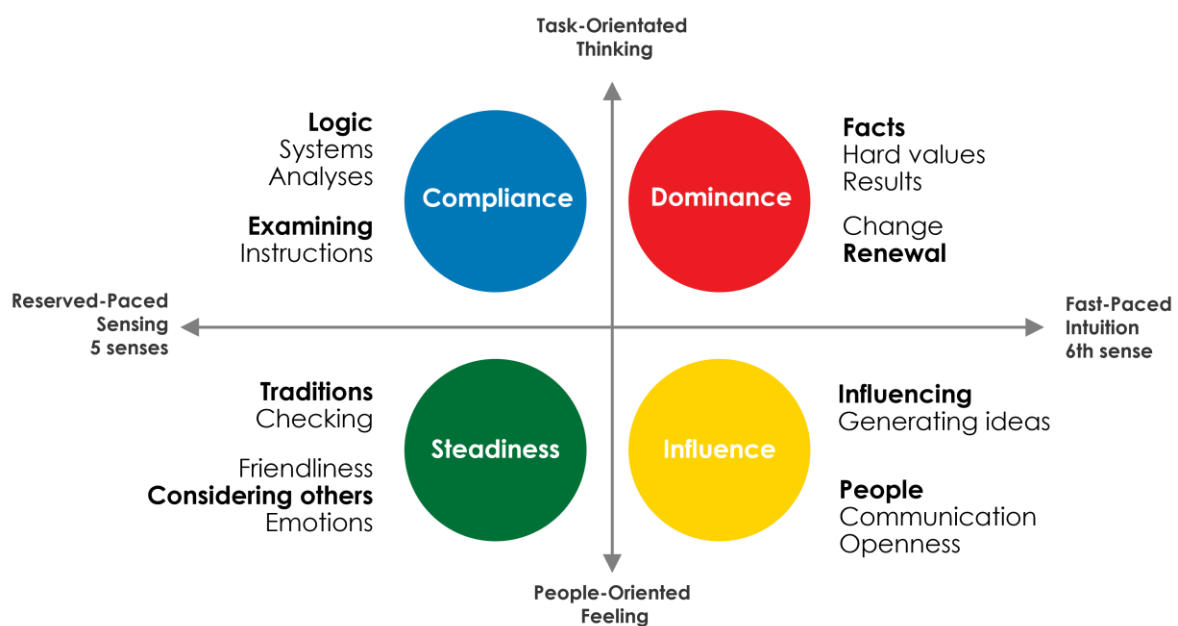
### Vertical Axis

#### Task-Oriented Individuals

- Task-Oriented: Task-oriented people value facts, goals, rules, achievements and personal freedom. They work independently toward personal goals and make decisions based on facts. They view things in terms of facts, figures, and results.

#### People-Oriented Individuals

- People or Feelings-Oriented: People-oriented individuals take other people's opinions into consideration before making decisions. They consider their opinions and how they may be affected. Exchanging opinions and feelings is important to people-oriented individuals; they are often emotions-based.





# Introducing the Five Modules

## The Five Modules

Our Level Two Advanced training focuses on the use of DISC and associated tools to improve performance across five key areas of business: professional development, team building, leadership, recruitment and sales development.



**Grow & Develop**  
Module One

### Module One: Grow & Develop

The first module covers the application of Extended DISC® in self-discovery and personal development. We introduce the Extended DISC® Grow and Develop assessment and explain how consultants commonly use this assessment to create a clear understanding of an individual's behavioural style. These insights then enable us to design personal development and coaching action plans.



**Team & Build**  
Module Two

### Module Two: Team & Build

Learn how to build a more cohesive and effective team using the extensive insights from the Extended DISC® Team and Build assessment. Understand how each individual reacts to being part of a team, based on their behavioural style and their likely role in the team. Use the Extended DISC® Diamond to assess whether you have the styles and strengths on your team to achieve your business goals.



**Lead & Manage**  
Module Three

### Module Three: Lead & Manage

The Extended DISC® Lead and Manage assessment provides extensive insights into an individual's leadership and management style, whether they are an existing leader or a future potential leader. We learn how the different styles lead and we introduce some of the other FinxS® tools which enhance leadership development initiatives.



**Recruit & Select**  
Module Four

### Module Four: Recruit & Select

In this module, we look at the Extended DISC® Recruit and Select assessment and its ability to help predict, prior to hiring, how an applicant will perform in a role. We learn what sort of work environment each behavioural style prefers and the tasks that suit them best. We also explore the Job Template to provide additional insights specific to the role or industry and examine the value this can add to the process.



**Sales & Service**  
Module Five

### Module Five: Sales & Service

In this module, we explore the Extended DISC® Sales & Service assessment. We look at the different behavioural styles and what types of sales and customer service they are most suited to. We also look at how salespeople can identify the behavioural style of their customer or prospect and tweak their sales pitch to enhance the sales process and motivate a buying decision.



# Grow & Develop

## Module One

# Grow & Develop: Self-Development Stages

## The Three Stages of Self-Development

Personal and professional development are lifelong processes of self-discovery and growth. Personal development is a way of assessing yourself in different contexts, considering what you want to achieve and taking action to realise your potential. We typically follow three stages of self-development:

### Stage 1: Self-Discovery

- Understanding how we learn
- Development indicators in Extended DISC® reports

### Stage 2: Personal Development

- Recognising how the Tip Group report can help with personal development and behavioural change

### Stage 3: The Action Plan

- Implementing a basic Action Plan to improve performance
- Case study

## Three Stages of Self-Development

1. Self-Discovery
2. Personal Development
3. Action Plan

## Stage One: Self-Discovery

### Stage One: Self-Discovery

The first stage in personal and professional development is self-discovery. Knowing and assessing yourself is a very powerful and illuminating journey!

Understanding how people learn, and what our distinct 'learning styles' are, is important for building our own self-awareness as well as for teaching or coaching others.

Knowing your learning style can help you enormously, making you aware of how your brain takes information in most effectively. When you know your optimal learning style and can apply it to your learning and education, then you have a greater chance of success than just hoping for the best.

Extended DISC® offers these insights into *Self Discovery and learning styles* through its numerous behavioural assessments and tools.

## Grow & Develop: Self-Discovery – Development Indicators

## Development Indicators

Extended DISC® assessments contain numerous development indicators. They can all be used for self-discovery and to inform action plans for personal and professional development. Let's look at the following development indicators in the Standard Behavioural Assessment:

1. DISC Styles
2. Special Cases
3. Strengths and Pressure Spots
4. Motivators and De-Motivators
5. Working in a Team
6. The perceptions of others

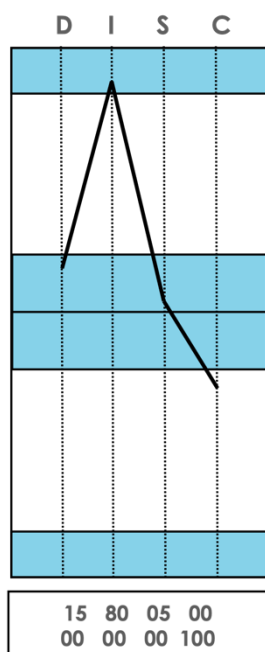
## Development Indicator One: DISC Styles

## Profile II – Natural Style

Profile II is a visual representation of your own behavioural style. It's based on your responses to the online questionnaire. **It is your natural style** (unconscious behaviour) and remains fairly stable, but not rigid, over your lifetime. It's the style that's most comfortable for you and uses the least energy.

Your natural profile is an ideal place to start your development and self-awareness journey. Your natural profile reveals your strengths and development areas in a variety of different areas.

## Profile II

[illegible]

## Grow & Develop: Self-Discovery – Development Indicators

## Profile I – Adjusted Style

Your adapted graph, also known as Profile I, illustrates how you were adapting your behaviour to your current environment at the time of assessment. Your adjusted style, or conscious behaviour, shows how you feel you need to adjust to meet the demands of your present environment. If you're flexing out of your natural behavioural zones, you may need more energy to display this adapted form of behaviour.

As we know, adapting our behavioural style can consume large amounts of energy. While we can adjust our style for short periods of time, adjusting on a long-term basis may result in feelings of stress or pressure. Profile I is another suitable place to start our self-awareness journey as it reveals how we are adjusting to cope with the demands of our environment.

### COMPARE Profile II with Profile I

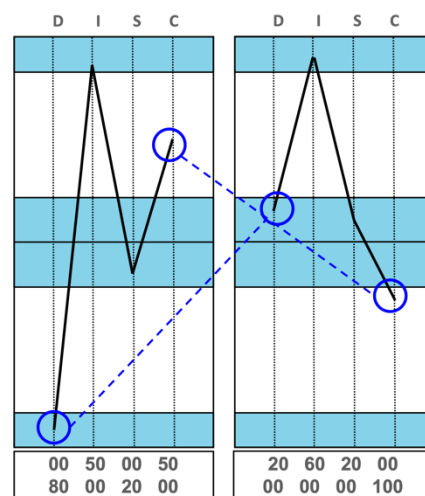
## Style moves down

**De-emphasising** styles - behaviour not valued  
or motivated - suppression of behaviour

## Style moves up

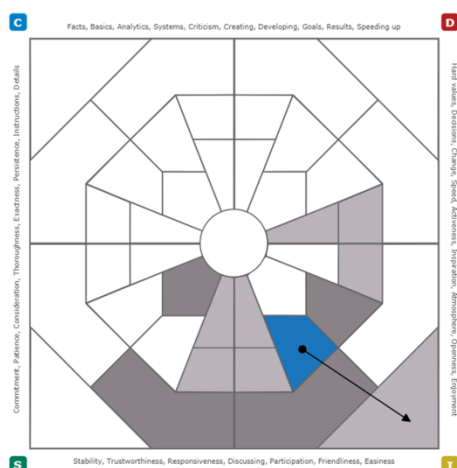
**Emphasising styles** – style ascending – feeling a need to emphasise this aspect

## Profile I and II



## Flexibility Zones

The Flexibility Zones Page demonstrates to what extent and in what direction an individual's behaviour is the most flexible, as well as what areas are farthest from their natural style. The Flexibility Zones are very useful development indicators, helping to identify factors such as the elements in an individual's job that compel them to leave their comfort zone. These areas may signal a need for further development and support.

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## Self-Discovery – Development Indicators

## Development Indicator Two: Special Cases

The Special Cases help us discern any underlying feelings an individual was experiencing at the time of assessment. They are often used as discussion openers to help a person open up and start talking about the feelings that are apparent. They also enable us to analyse any obstacles that may be hindering our self-development.

## Shape

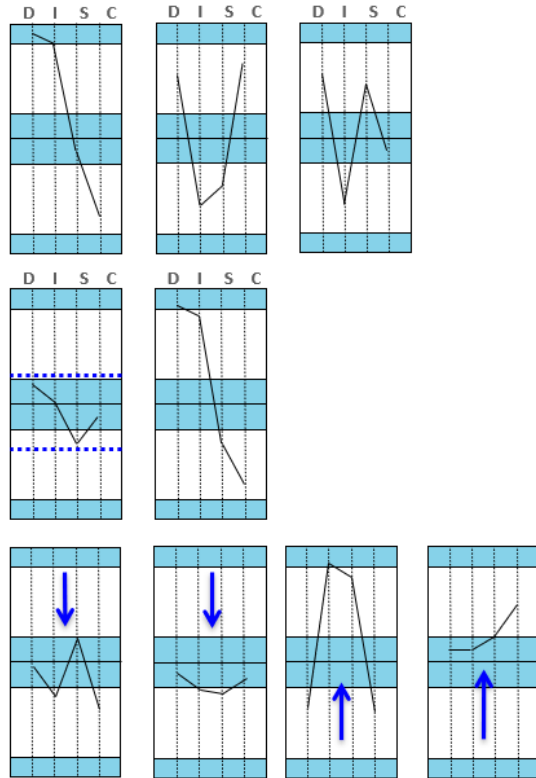
## Behavioural style

## Size

### Tightness

## Position

Ascending / Descending

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## Grow & Develop: Self-Discovery – Development Indicators

## Development Indicator Three: Strengths & Pressure Spots

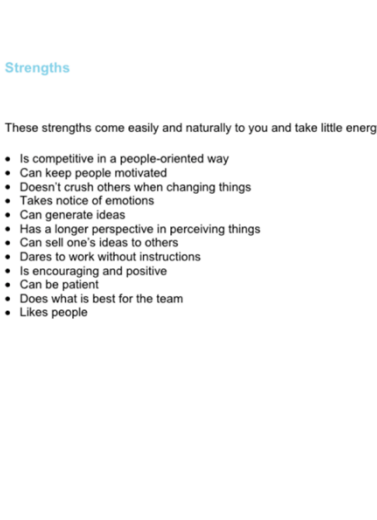
## Strengths

Your key personal strengths are those that come very easily to you. Use the Strengths page to ensure you are capitalising on your strengths as you strive to achieve your goals. Your strengths:

- Give you a better understanding of yourself
- Are traits you can leverage on
- Are part of your personal growth – knowing what you excel in, enables you to grow further.

Should I focus on my strengths or try to improve my weak spots? Your strengths are things you are already good at, and although you shouldn't take them for granted, you won't need to invest so much time and effort into improving these areas.

On the other hand, working to develop your weak spots can contribute significantly to personal growth. If there's something you're not good at but need to use, or if you react in a less than ideal way under pressure, then improving this even slightly could make a huge impact on your overall performance. Don't just try to eliminate your weak spots, instead try to work around them and develop them so they don't hold you back!

A tablet with a light blue background. At the top, there is a small black dot. Below it, the word "Strengths" is written in a blue, sans-serif font. Underneath, a paragraph states: "These strengths come easily and naturally to you and take little energy:". This is followed by a bulleted list of ten strengths. The tablet has a white home button at the bottom center.

## Strengths

These strengths come easily and naturally to you and take little energy:

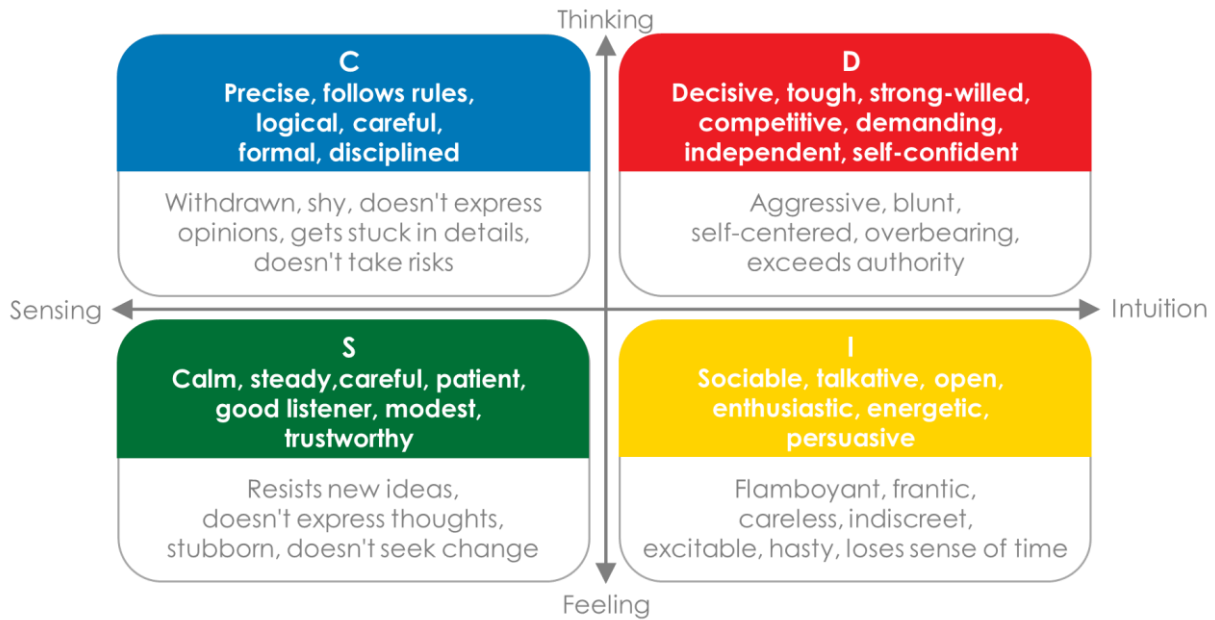
- Is competitive in a people-oriented way
- Can keep people motivated
- Doesn't crush others when changing things
- Takes notice of emotions
- Can generate ideas
- Has a longer perspective in perceiving things
- Can sell one's ideas to others
- Dares to work without instructions
- Is encouraging and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

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## Grow & Develop: Self-Discovery – Development Indicators

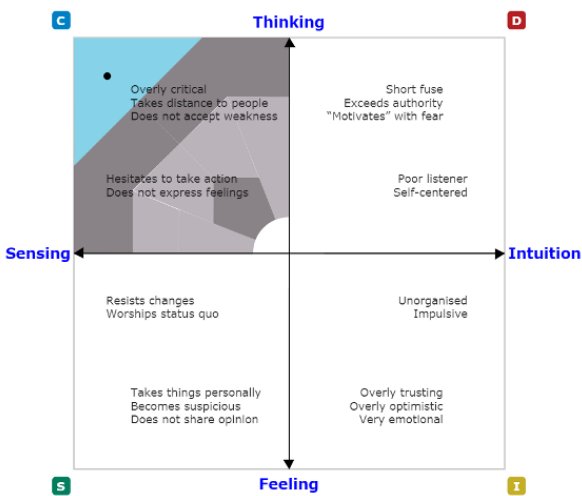
## Overuse Areas

We know each style has its strengths and development areas. However, when we rely on our strengths too much and use them too often, they can start to become a weakness. We call these Overuse Areas.



## Overuse Diamond

The Overuse Diamond includes generic text on how an individual may behave when under stress or pressure, or simply when overusing/over-emphasising their natural behavioural style(s).

[illegible]



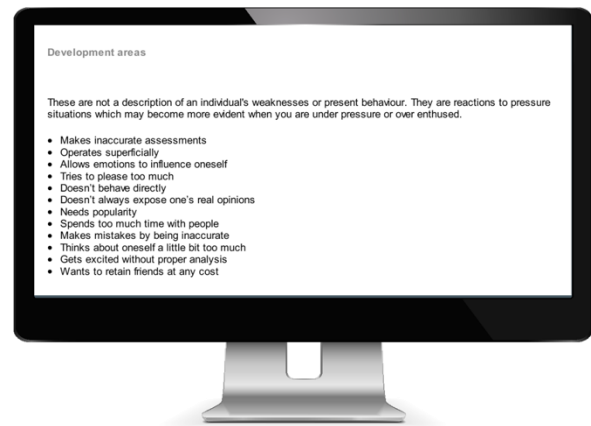
# Grow & Develop: Self-Discovery – Development Indicators

## Understanding Your Pressure Areas

It's just as important to recognise your weak spots as it is to know your strengths. Your weak spots are more likely to hold you back from success and achievements. However, you can often improve your weak spots quickly and easily. Weak spots can include anything from professional to social skills and they are more prominent when you're under pressure. The development areas in the Standard Assessment are a great place to start learning about your pressure areas.

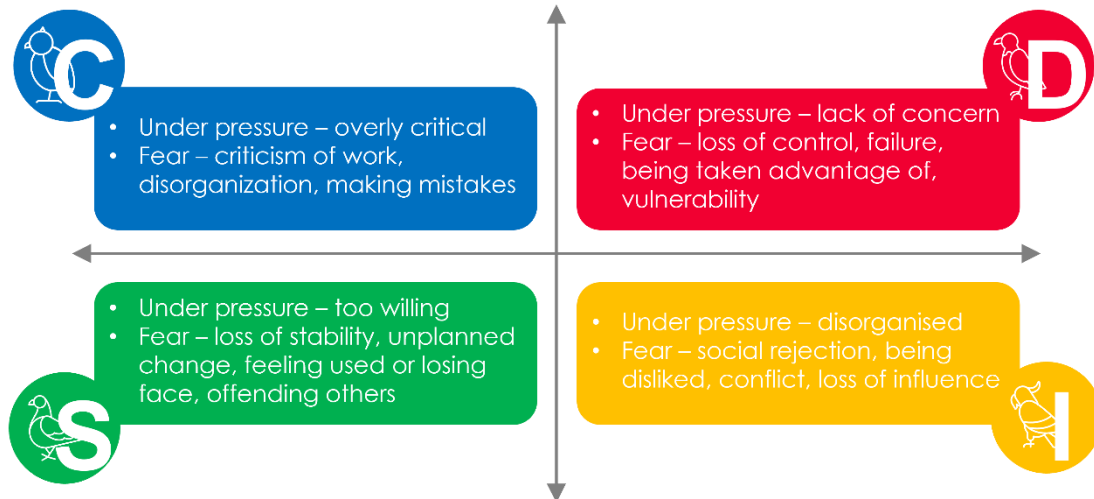
The Development Areas are a description of the potential risks and not the current style of behaviour.

The demands of work and personal life create pressure. Being aware of your typical reactions to pressure makes you better equipped to deal with a difficult situation when it arises.



## What the different DISC Styles fear

In the face of something they fear, the reactions of the different DISC styles can be quite obvious. Let's look at some typical fears style by style.



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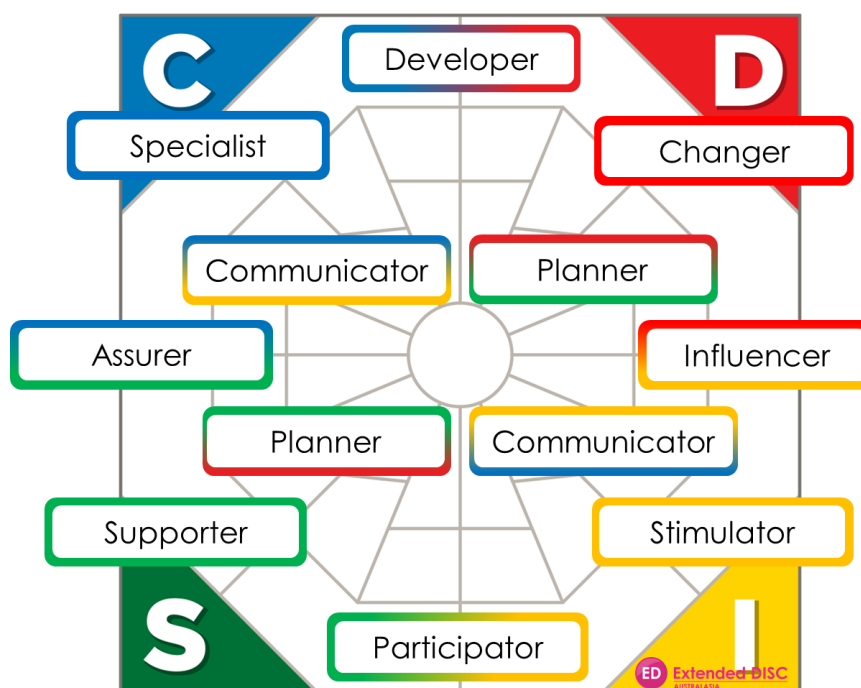
# Grow & Develop: Self-Discovery – Development Indicators

## Development Indicator Five: Working in a Team

Team skills are considered essential in most industries and job sectors. They can be described as the ability to work with others - to adapt and be effective - in a variety of business circumstances. Team activity builds character, teaches empathy, achieves goals - all integral to your personal growth.

Even if you're not a natural team player, there are times when it's crucial to learn to be!

The Team pages in your Standard Assessment help explain how you are likely to behave in a team. Understanding how you operate in a team environment is important. What role in the team do you naturally tend to take? Are you a team player? Or do you prefer to work autonomously?



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## Development Indicator Six: How Others Perceive You

The page detailing how you may come across to others is a description of how you are typically seen by others. This page helps you to develop an overall picture of yourself. The following comments don't take into account any "learned behaviour"; you may have already addressed many issues.

[illegible]

# Grow & Develop: Exercise – Motivating Suzy

## Exercise – Motivating Suzy

Suzy, a high S DISC style, is a valued member of your Sales Team. She connects with customers, once they have made an initial purchase, to provide support and upsell. You've noticed that Suzy isn't as productive as usual. She's become withdrawn and doesn't seem to be as flexible as she used to be.

You find a copy of Suzy's report and look at her motivators to understand how to help her get back on track.

Using the Motivators section from Suzy's Grow and Develop report (see below), write a few strategies you could implement to help remotivate her.

## Motivators

You are more likely to respond positively if these motivators are present or increased in your workplace:

- Security
- Continuity
- Harmonious development
- Trustworthiness
- Long-term orientation
- Honesty and sincerity
- Personal attention
- Belonging to a team
- Familiar people
- Opportunity to think and consider
- Methodical planning
- Balance

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# Grow & Develop: Stage Two – Personal Development

## Stage Two: Personal Development

### Stage Two: Personal Development

Personal development is the process of developing qualities to help you succeed, both personally and professionally. A significant part of personal and professional growth is developing a strong sense of self-awareness. The process includes identifying your unique personality and capabilities, your strengths and development areas, your aspirations and talents and your development indicators.

Reviewing your Extended DISC® Assessment and learning what your indicators are is the easy part. The real value comes from what you've learned about yourself and from reflecting on those behaviours that might need to be modified and developed.

The Extended DISC® TIP Groups Pages (Grow & Develop Assessment, pp. 21-22) provide practical ways to develop skills, competencies and behaviour to help you reach your full potential and achieve your goals.

### TIPS

Extended DISC® generates specific information for Personal Growth, known as the Tips. These Tips create an instant, practical connection between an individual's behavioural style and their everyday workplace behaviour, leading to better understanding, better sales and ultimately, better business.

### What are the Tips Pages?

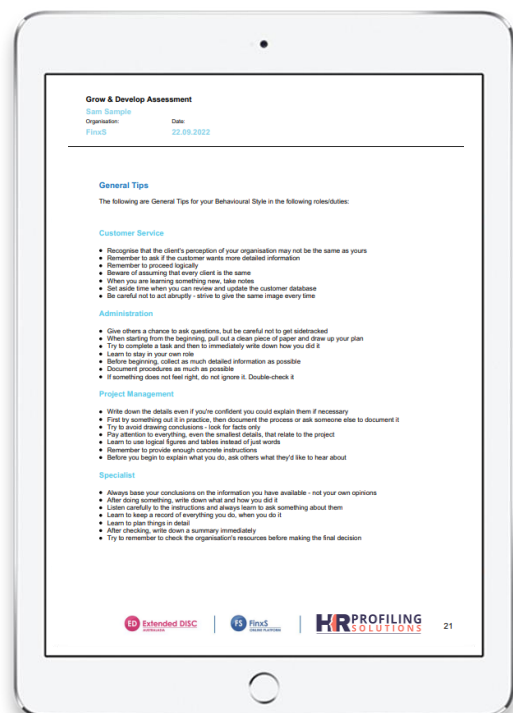
The Extended DISC® Tips Pages provide specialised and specific information for Personal Growth.

- Tip groups are dynamic
- They're based on a person's dominant behavioural style
- They offer tips in a number of areas
- They're suitable for both immediate development *and* long-term coaching
- They target specific business roles and personal behaviours

The Tips Pages provide tips in the following areas:

- customer service
- office administration
- project management
- specialist
- teamwork
- management reminders

Note that the system offers tips in other areas as well; these are available in the Tip Group Assessment.



# Grow & Develop: Stage Three – Improve Performance

## Stage Three: Improve Performance

### Stage Three: Improve Performance

The final stage is to put what you learnt in Stages One and Two into practice. This stage should lead to behavioural changes and improved performance.

### QuickFIX 5-Point Action Plan Exercise

1. Go through your Extended DISC® TIPS Pages and put a tick beside **ten** TIPS that relate to an important aspect of your role or personal development.
2. Go through and rate the 10 TIPS you selected with an A, B or C:  
A= must have  
B= helpful to have  
C= nice to have
3. Now go through and rate those 10 TIPS according to how you perceive your ability:  
1= already competent  
2= some development needed  
3= behaviour to be developed
4. Highlight any A3s or A2s to start forming your own Behavioural Action Plan. Repeat the process with any B3s or B2s. This will give you a clearly prioritised Action Plan.
5. Most Action Plan development areas fall into one or both of the following categories:
  - Improved Time/Process Discipline = TD
  - Overcoming an interaction constraint = BDGo back and analyse your 10 development areas and mark them with TD or BD. If they are a TD then add a realistic time frame –

#### Behavioural Discipline Hints:

It takes longer to change behaviours than you think and reinforcement is essential. Go through your plan with someone else, who can support your commitment.

#### Time Discipline Hints:

- Consider whether you are an a.m. or a p.m. person.
- Start the day with something you like doing – but be disciplined with your time.
- Schedule the first small step of a big project in your diary (e.g., 'Gather data for sales meeting next week') and make a commitment to stick to it!
- Schedule the next step and try making yourself accountable to someone.

# Grow & Develop: QuickFIX 5 Point Action Plan

Development Area	A,B,C	1,2,3	A3 or A2	B3 or B2	TD or BD



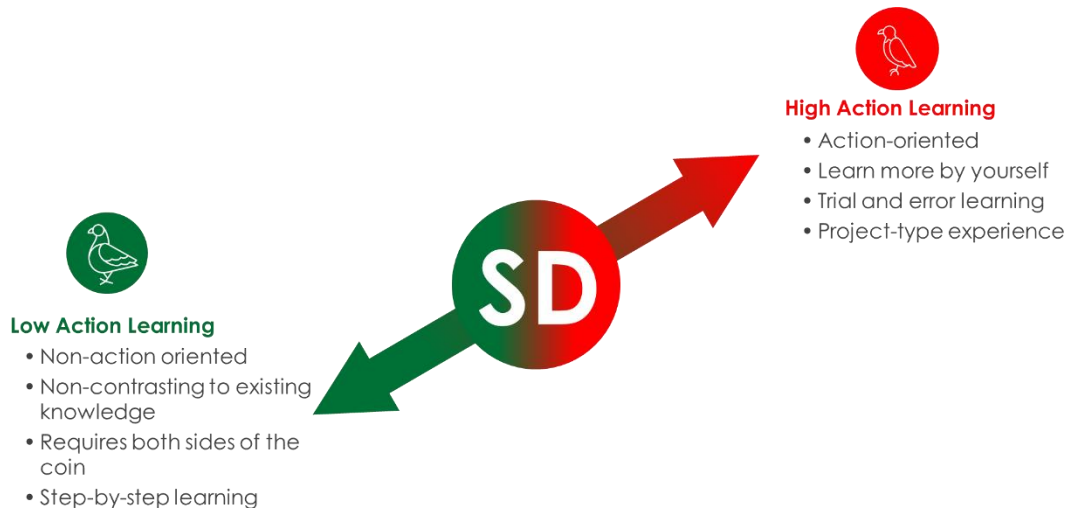
# Grow & Develop: Learning Styles

## The Learning Styles

The DISC styles have different preferences and priorities when it comes to the learning process. We can break the four styles into other combinations, much like the four-quadrant model, to learn about each DISC profile and learning style.

### Action Learning

- High-Action Learning: D styles are typically high-action learners. They learn by having a go. They are action orientated, learn independently through trial and error.
- Low-Action Learning: S styles are typically low-action learners. They learn through step-by-step processes and understanding different perspectives



### Structured Learning

- Structured Learning: C Styles are structured learners. They require time to think, a framework to assimilate information into their existing knowledge and deep learning.
- Non-Structured Learning: I styles are non-structured learners. They learn by sharing, group activities outside of class settings and superficial learning without going too deeply into meanings.



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## Grow & Develop: Further Development Indicators

## Further Development Indicators

There are many other development indicators available from Extended DISC® that you can add to your customised reports or view using Open Preview. These include:

- 10x 4Q Diamonds
- Job Templates
- Learning Style Competencies

## YOUR LEARNING STYLE

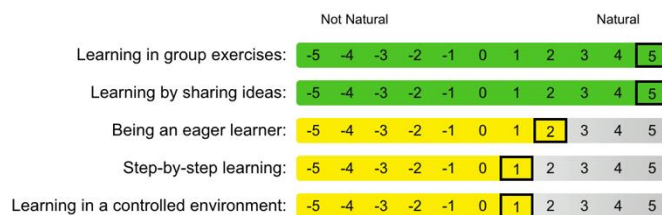
We all have a unique mix of learning styles. Some people have a dominant style of learning and rely on only 1 – 2 techniques. Others may use different techniques in different situations. There is no correct or ideal mix, nor are learning styles fixed. You can develop the ability to pick-up other learning styles, as well as further develop techniques that you already use. You may be surprised to hear that your DISC Style may also indicate the learning style that best suits you.

The DISC Styles have different preferences and priorities when going through the learning process. Each of the four styles can be broken up into different areas of learning, much like the four quadrant model. These four different areas are, low and high action learning and high and low structure learning.

**Interpreting the bar graphs is simple:**

- The **rectangles to the right side** of the graph identify your preferred learning styles.
- The **rectangles to the left side** of the graph identify ways of learning that may be more difficult and require more energy from you.

Please note: The competency group displays your top five preferred learning styles

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# Team & Build

## Module Two

# Team & Build: Introduction

## Introduction to Team and Build

Whether you're forming a new team in your organisation or looking to develop the skills of your existing teams, navigating the various behavioural styles of your workforce can be complicated at the best of times.

Extended DISC® is a powerful tool for helping you understand the design and make-up of your teams. Use DISC to understand how each individual reacts to being a team player, based on their behavioural style and their likely role in a team. Assess, using the Extended DISC® Diamond, whether you have the styles and strengths on your team to achieve your business goals.

1	Who is a Team Player and their attitudes to activities
2	Looking at how we fit into natural Team Roles
3	Understand your team through team types
4	A little trick to manually complete Team Tasking
5	What the Team Arrow maps mean
6	How the Flexibility Map can help
7	Going through the Team Analysis Report

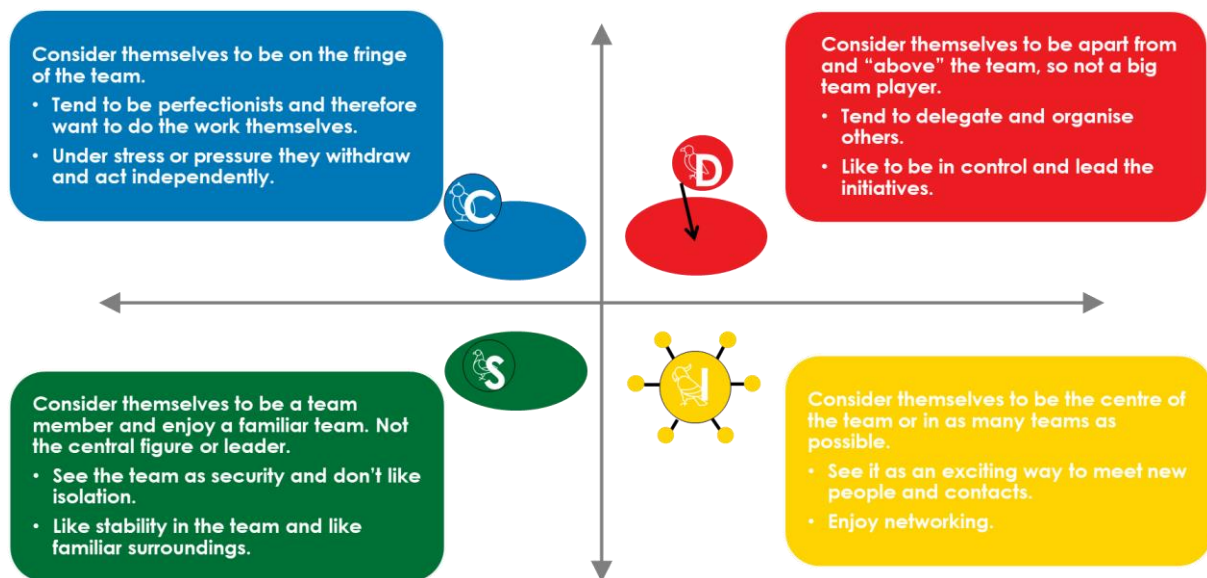
## What is a Team?

A team is a group of individuals, all working together for a common purpose. If there was no common purpose then you'd just have a group of people.

When employees are willing to work together as a team to accomplish goals, the whole company benefits as a result.

Let's take a look at the attitudes of the different DISC styles to teamwork.

## Attitudes to Being a Team Player



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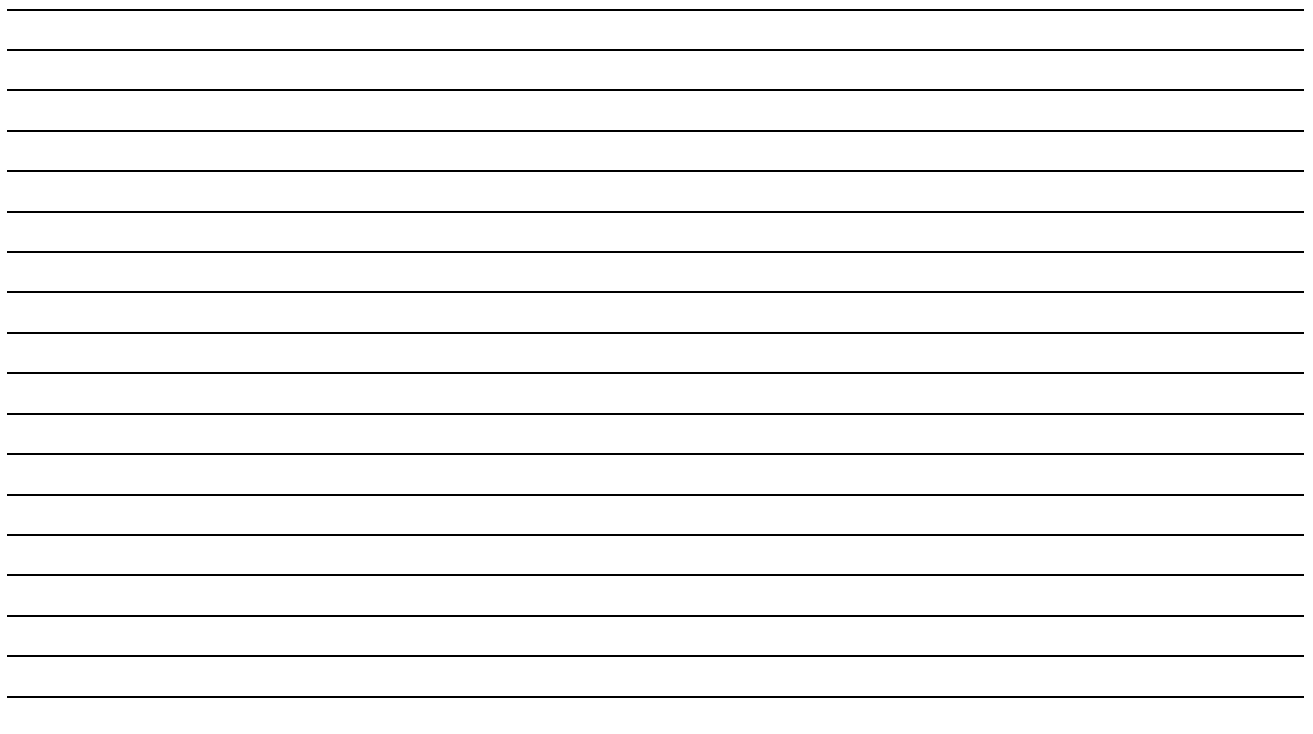
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The graphic below describes how the styles approach team activities.



# Team & Build: Team Roles

## Team Roles and Team Types

The DISC team roles are a description of how an individual is likely to perform in a team. These roles indicate how people function in a group situation.

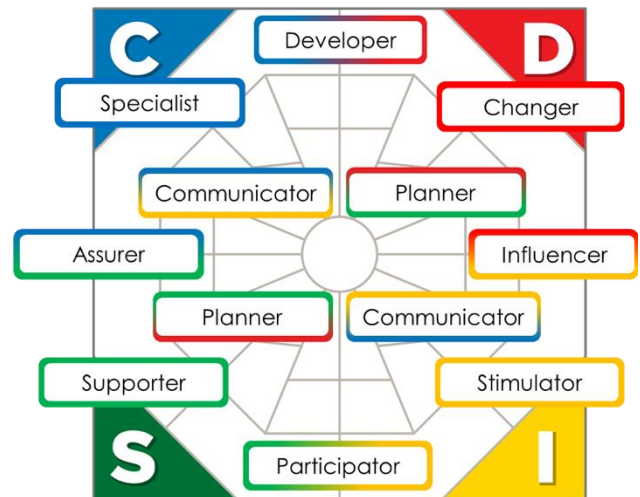
How significant would it be for your organisation, or for team productivity, if you knew more about the make-up of your team?

What if you could design a team that functioned at its maximum potential, using the natural strengths of its members?

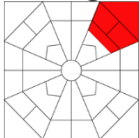
Would it help you, as a manager, to achieve your goals and targets if you had insight into the roles your team members tend to adopt?

## Team Roles

Every DISC style has strengths and stumbling blocks when it comes to working in a team. Some prefer tasks while others prefer to concentrate on balancing people's emotions. This is where Team Roles are beneficial, as they provide a framework for looking at the styles in a team environment. Extended DISC® Team Roles divide team functions into 10 roles. Each of the roles has its own strengths and weaknesses. Please note, styles that consist of opposites (i.e. IC styles) are found near the middle of the graph.

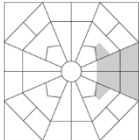


### Changer



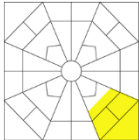
- Reformer, straight-up, decisive, impatient, tough
- Knows what they want
- Makes quick decisions

### Influencer



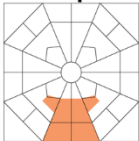
- Vivid, full of ideas, talkative, spontaneous, restless
- Talks people on to their side
- Acts on instincts

### Stimulator



- Extrovert, open, sociable, jovial
- Makes things happy
- Prepared to 'roll with it'

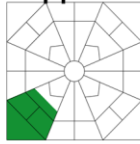
### Participator



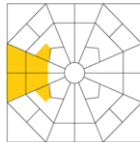
- Pleasant, friendly, calm, helpful
- Does not put themselves first
- Understands people

## Team & Build: Team Roles

## Supporter

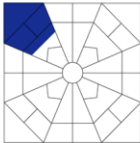


- Careful, even-tempered, trustworthy, calm
- Does not try to attain the impossible
- Wants to help others

**Assurer**

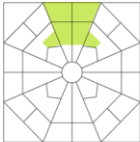
- Thorough, prudent, accurate, pensive, quiet
- Does not state their own opinion
- Does things the way they should be done

## Specialist



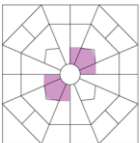
- Seeks perfection, pedantic, exacting, inquiring
- Examines why things are the way they are
- Notices details

## Developer



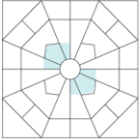
- Focused on the facts, creative, demanding
- Analytical, distant
- Produces brand new ideas
- Demands a lot from everybody

## Planner



- Holds on to their outlook
- Prudent, target-minded, demanding, systematic
- Goes where they want

## Communicator



- Friendly, accurate, justifying, modest, open
- Understands different opinions
- Explains why things are the way they are

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on the right side, suggesting it's resting on a surface.

# Team & Build: Shotgun Map

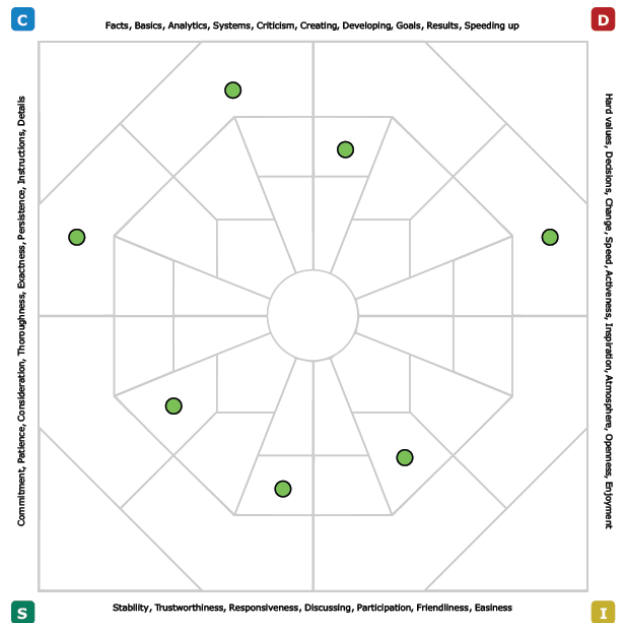
## The Shotgun Map

The Shotgun Map demonstrates where the natural behavioural styles of the team members fall on the Extended DISC® Diamond. Each team member is represented by a dot on the Shotgun Map. The positions of the dots correspond to the positions of the team members' Profile II on the Diamond.

Individuals are allocated a specific Team Role in accordance with where they sit on the Diamond. The Extended DISC® assessment will indicate the Team Role of each Team Member.

Shotgun Maps can compile large groups of people in one image. Therefore, you can use Shotgun Maps for an entire organisation, department, or team.

The Shotgun Map provides valuable information about the makeup of teams and organisations without sacrificing the confidentiality of individual results. Using the Shotgun Map we can analyse the opposite factors.



Where are our **strengths**?



Where are our **weaknesses**?



Do we have a **concentration** of any **behaviour**?



How does this **affect the team?**



What behaviours are **missing**?



How can we **substitute** them?

[illegible]



## Team & Build:

# Complementary and Convergent Styles

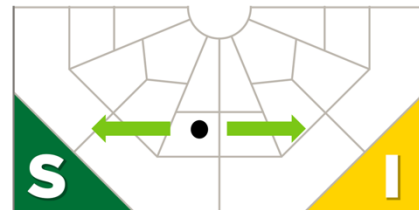
## Complementary and Convergent Styles

Some roles are easier and more comfortable to interact with, and some take more energy and effort. Remember that there are no good or bad team roles, only different ones. Team roles that are easier to interact with are likely to be similar to your own role. Whereas more challenging roles will be opposite to you. These are called convergent styles and complementary styles.

Using the Shotgun Map, we can also analyse convergent and complementary styles.

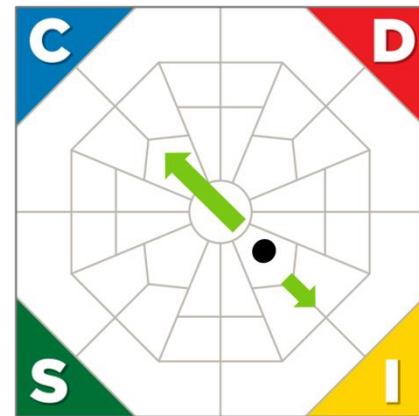
### Convergent Styles are:

- People sitting next to you on the Extended DISC® Diamond
- They have similar functions to you and tend to be easier to work with
- They communicate, filter information, and conduct activities and tasks in a similar fashion to you



### Complementary Styles are:

- People sitting opposite you on the Diamond
- Their development areas are usually your strengths
- They have opposite functions and are more challenging to work with

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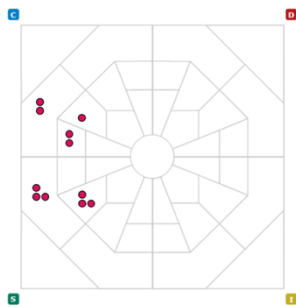
# Team & Build: Team Types

## Team Types

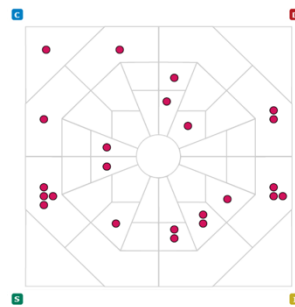
Our knowledge of team roles contributes to our understanding of team types. Being able to identify team types enables us to apply a strategy when developing teams. To pinpoint a team type, look at the clusters of little circles on the Shotgun Map. They might be clustered together tightly in one area or sprinkled all over the Extended DISC® Diamond. They could be clustered on opposite sides of the Diamond too. Possessing this information will put you in a good position when it comes to training or consulting with a particular team.

The three team types are:

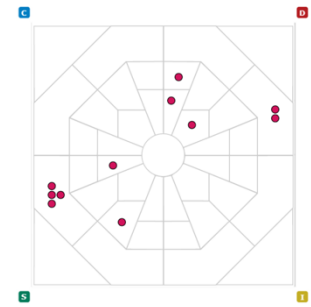
- Homogeneous
- Heterogeneous
- Diverted



**Homogeneous Team**



**Heterogeneous Team**

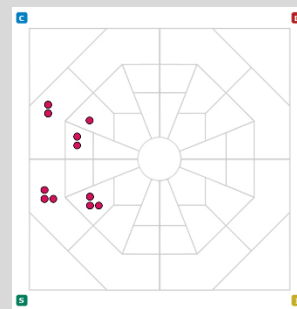


**Diverted Team**

### Homogeneous Team Types

In homogenous teams, individuals tend to share similar traits and attributes. The advantage of this type of group is that there's a lot of cohesion. Productivity and goal accomplishment is high. If you group similar people together, you may find that things really advance in a particular area.

The disadvantage is that excessive cohesion can turn into 'groupthink', which means that all members think alike. They want to stay within the same comfort or flexibility zones as one another. They might all use the same strategies. They may all be very aware of potential change but not so willing to implement it. The strength of this team is communication, and the challenge is flexibility.



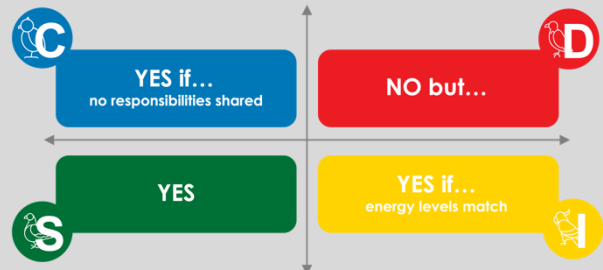
#### Homogeneous Team

Strength

Communication

Challenge

Flexibility




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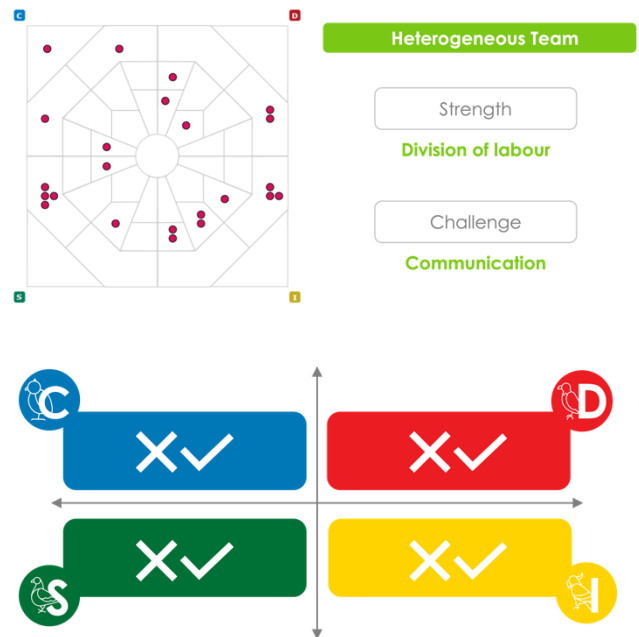
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# Team & Build: Team Types

## Heterogeneous Team Types

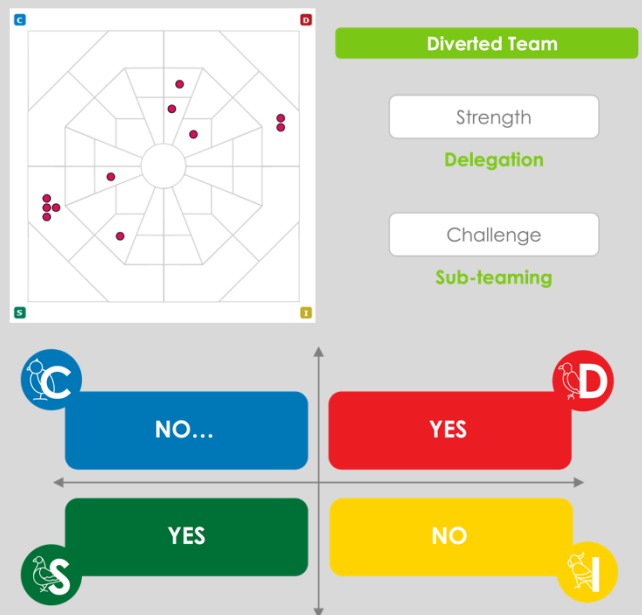
Heterogeneous teams tend to be the most common type. The team members have a diverse orientation, and the dots are plotted relatively evenly across the Shotgun Map. Agreement may not be easily reached because they think differently, need different things, and communicate using different styles. Diverse attitudes to activities may also result in disagreement. In short, achieving consensus may at times be difficult.

Though making a decision or striking a deal may take longer, a diverse range leads to far more innovative solutions. In situations, like planning or research, where creativity is essential, this type of team may have an advantage over the others. The strength of this particular team type is a division of labour. The challenge is communication.



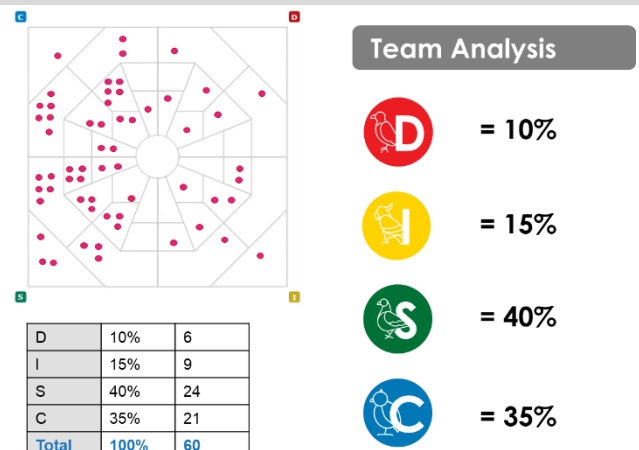
## Diverted Team Types

Diverted teams consist of opposites - opposite traits and attributes. Agreements may rest on a base-layer of conflict, when they've been pushed through by one sub-group in opposition to another. In this situation, it might be that one sub-group is stronger verbally or more extroverted and they've successfully pushed to get what they want against another group that may not be as verbal or assertive. Delegation is strong in diverted teams, allowing members' strengths to be utilised. They can use their strengths well if there's tolerance. If sub-teams form, there is a risk of losing cohesion. Delegation is the most significant strength of this team type as members have opposite strengths to each other. The greatest challenge is to avoid the formation of sub-teams.



## Percentage Table

The table below the Shotgun Map in the Team and Build Analysis shows the percentage mix of the DISC styles in a team. This particular team is 10% D style, 15% I style, 40% S style, and 35% C style. The table also tells you how many people are in each group. This information can be useful to know in larger teams.



## Team & Build: Name Map

## Name Map

The Name Map provides the same information as the Shotgun Map but uses team members' names instead of dots.

Once we've seen an overview of the team, we may wish to know who is located in which area. It can be useful to consider the overall distribution, team strengths, weaknesses and subgroups and also to discover if anyone is alone in a specific area. The Name Map may also provide an indication as to why certain people avoid certain tasks or subjects.

When analysing the Name Map, we might ponder these questions:

## Overall Distribution

- How does the team's make-up relate to their overall objectives?
- What might the communication and cooperation needs be of people who are far apart on the Map?

## Team Strengths

- What specific strengths does each team member bring to the team?
- Does any area of the map have a high concentration of individuals?
- What does it mean, especially in terms of our goals, that there are more people in this area?
- Is it possible that the team may over-emphasise the strengths of this particular behavioural style?

## Team Weaknesses

- Is there an area on the Map, where there are no (or few) individuals from the team?
- How is the team going to compensate for this, particularly in regard to its objectives?

## Sub-groups

- Do the individuals with similar styles flock together too much?
- What are the communication and cooperation needs of people who are far apart on the map?
- Is there any conflict between the different sub-groups?
- Is the team required to perform different types of activities?
- Could there possibly be a better distribution of the team's responsibilities?

## Individuals Alone in Areas

- Is the team taking advantage of their special strengths?

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# Team & Build:

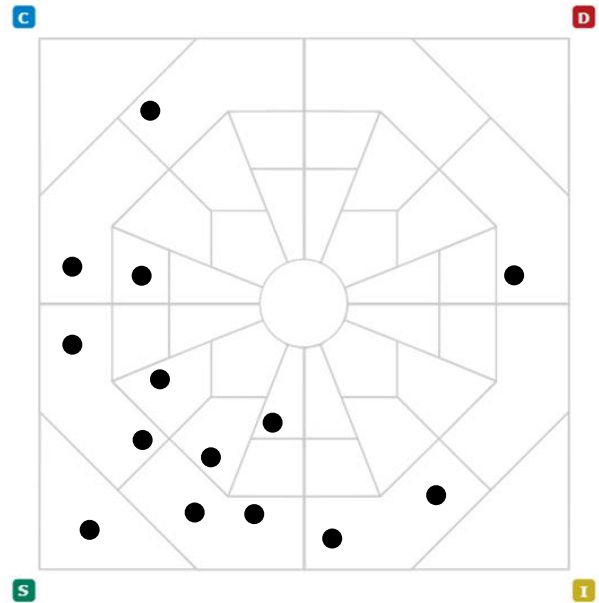
## Exercise – Analysing a Sales Team

### Group Discussion - Analysing a Sales Team

This is a customer service / sales team working in the printing equipment industry.

Discuss the Shotgun Map and draw some conclusions about the make-up of the team.

Look at their strengths as a team, their development areas, potential pitfalls and a few more areas.



**Overall Distribution:**

**Strengths:**

**Development Areas/Potential Weaknesses:**

**Potential Pitfalls:**

**Avoiding Pitfalls:**

**Sub-groups:**

**Lone Areas:**

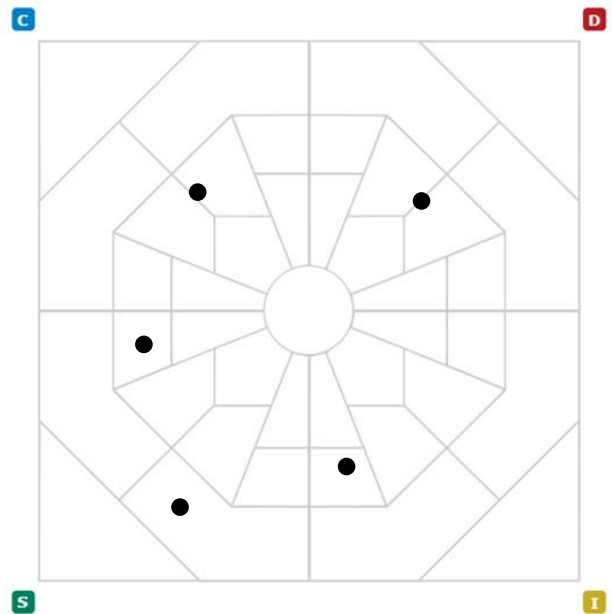
# Team & Build:

## Exercise – Software Development Team

### Software Development Team

#### FinxS® Team Analysis – Shotgun Map

On the right is a Shotgun Map of your team – it's a software development team. Keep in mind the context that your team operates in.



#### Answers

List the main strengths of your team:

List your team's main development areas and the challenges they create:

Identify the key issues that your team members should bear in mind. (Consider, for example, whether there might be a concentration of styles, a lack of styles, or too much emphasis on the strengths of a particular style or styles, i.e., where a strength may become a weakness, and so on).

Identify some of the potential pitfalls your team should be wary of.

Suggest how your team could avoid these pitfalls.

# Team & Build: Team Tasking

## Team Tasking

Team tasking involves assessing what tasks need to be done for the team to achieve their goals and then using the Extended DISC® Name Map to discover who the best fit for each task is. Team tasking can provide answers to questions like:

- Are the members of our team a good fit for the specific tasks assigned to them?
- Have we matched tasks with people in such a way that they're working within their comfort zones and, as a result, gaining the motivation they need to succeed?

## Job Role Match

- How strong is the match between individuals and the specific requirements of their job?
- How well do team members complement each other?
- How effectively do team members interact and work together?

## Task Match

- Is there a good match between individuals and the tasks they've been assigned to do?
- Should any responsibilities be reassigned?
- Should some tasks be delegated?

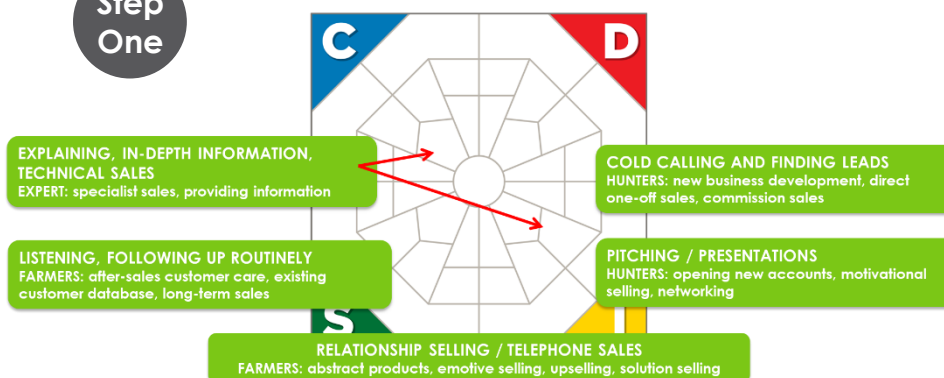
## A Team Tasking Example

Let's consider the responsibilities of a sales team, such as:

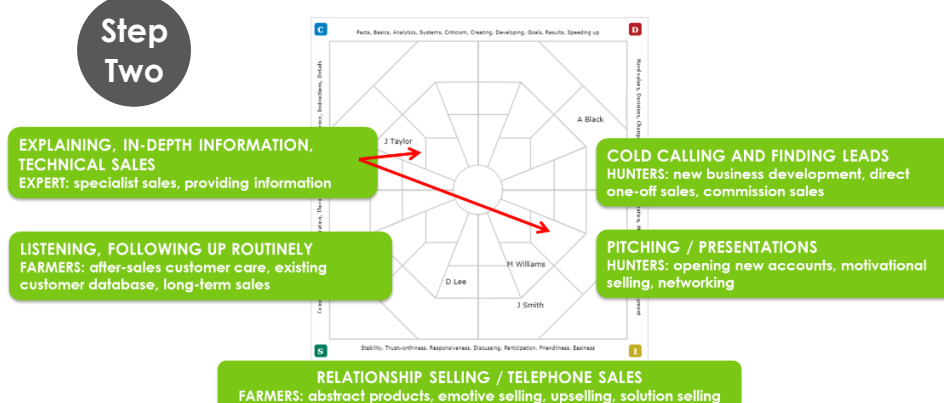
1. Cold calling/finding leads
2. Product presentations/pitches
3. Relationship selling/telephone sales
4. Listening and following up/customer service
5. Explaining in depth information/technical sales

Our first step is to plot these tasks on the Diamond and then overlay the Team Name Map so we can analyse the tasks and the job role match.

### Step One



### Step Two



## Team & Build: Arrow Maps

## What is the Arrow Map?

The Arrow Map is based on the Extended DISC® Diamond. It provides the same information as the Name Map, indicating where on the Extended DISC® Diamond the natural behavioural styles of the individual team members fall (the starting point of the arrow = Profile II) and also where their adjusted styles fall (the tip of the arrow = Profile I).

The Arrow Map can help us understand the following:

- How the entire team is adjusting in the current environment.
- How individual members are adjusting.
- What degree of adjustment is indicated by the length of the arrows - usually the longer the arrow, the greater the adjustment.
- What the impact of the current situation is. The team might be working on a short project, necessitating the use of different behaviours to achieve the desired results – thereby producing a long arrow. Note that the leadership, feelings of unity, pressure and alignment of tasks can also influence the arrows.

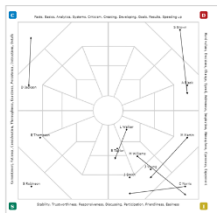
Some questions we might consider when analysing the Arrow Map:

- Does the team need to modify their behaviour to meet their responsibilities?
- Do most arrows point in the same direction?
- Why does the team feel it needs to adjust?
- Is the team feeling pressured from different directions?

## Team Arrow Dynamics

## 1. No Arrow

- No pressure from the environment to adjust
- This doesn't necessarily mean everything is OK



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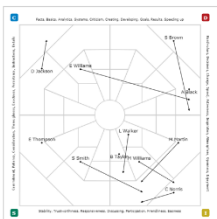
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## 2. Part Arrow

- No pressure to adjust in a certain or specific way
- Some feeling the need to adjust, others not



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### 3. Full Arrow

- Pressure to adjust towards a target
- Members feels pressured to adjust in a certain direction



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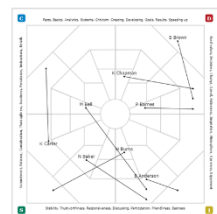
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#### 4. Mixed Arrow

- Members may be being treated more as individuals than a team
- Working as a team may be presenting some challenges



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# Team & Build: Team and Build Analysis

## What is the Team & Build Analysis?

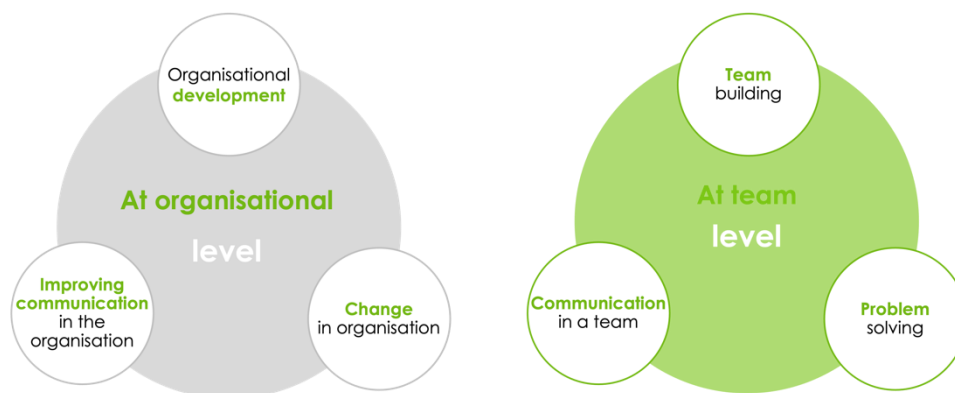
The Team & Build Analysis is a tool that combines all the individual assessment results into one report. It demonstrates:

- team dynamics
- strengths
- development areas
- adjustments being made by team members

The Team and Build analysis provides a clear, easy-to-use framework for understanding some complex issues. The report can help solve potential problems and improve the performance of individuals and the team. It also presents a safe environment to discuss challenging topics productively. The team analysis provides the big picture that enables decisions to be made with confidence. The Team and Build Analysis has many applications at both the organisational level and the team level.



## Where Can it be Used?



## Team Issues

The Team and Build analysis can also be used in the following situations:

### Recruitment

Ever wonder how a new person will fit into an existing team? Make sure you hire the right person!

### Optimising your team

Are your people in the right positions for their natural preferences?

### Implementing change

Need to know who requires extra help adjusting to change?

### Identifying behaviours

Want to find out what the most effective behaviours for a position are?

### Communication problems

Are any management or process issues affecting communication?

### Performance issues

What is your team structure? Are there any gaps or overlapping behavioural styles?

# Team & Build: Team and Build Analysis

## What is in the Team and Build Analysis?



- 1 Cover Page
- 2 Shotgun and Name Map
- 3 Flexibility and Arrow Map
- 4 Team Profiles
- 5 Team Roles
- 6 Behavioural Competencies

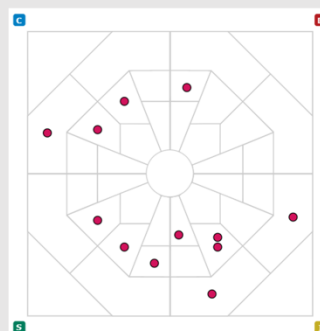
### Shotgun Map Questions

Shows where and how the team members (Profile 2) are placed around the Diamond. No names are used.

#### Questions:

- Is there a concentration of people in one quadrant? Clusters?
- Is it necessary to have people in each quadrant?
- What are the pros and cons of having a certain style or team type?

### Shotgun map



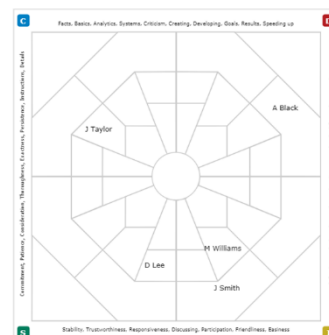
### Name Map Questions

Shows where and how each named team member is placed around the Diamond.

#### Questions:

- Are team members sitting in the positions you thought they'd be in?
- Do you observe behavioural and/or job role connections between team members?

### Name Map



# Team & Build:

## Team and Build Analysis

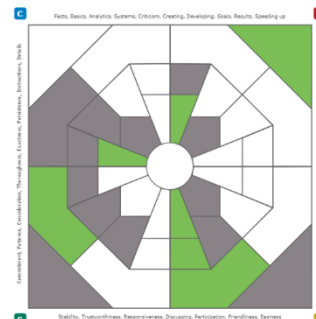
### Flexibility Zone Questions

Shows the Team's Comfort Zone and energy expenditure.

#### Questions:

- How do the comfort areas of the team relate to the team objectives?
- Are there responsibilities that fall within the white areas?
- Does the team need to modify its behaviour to meet those responsibilities?

### Flexibility Diamond



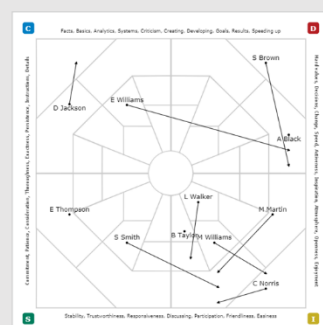
### Arrow Map Questions

Shows where and how the team is adjusting in the current environment.

#### Questions:

- Does the team need to modify its behaviour to meet the responsibilities?
- Do most arrows point in the same direction?
- Why does the team feel it needs to adjust?
- Is the team feeling pressured in different directions?

### Arrow Map

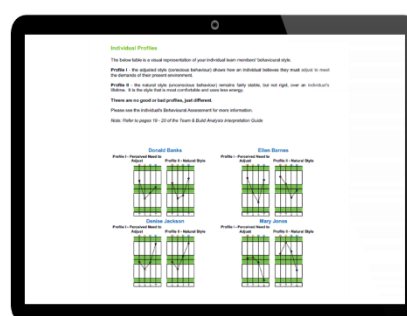


### Team DISC Profiles

Shows the team members' Profiles or condenses them into a table, so you can see at a glance what combination style members are. Profile graphs can help identify expressed emotions through Special Cases.

#### QUESTION:

- Does an analysis of the Special Cases in the team show a trend? i.e.: frustration, uncertainty of role etc.




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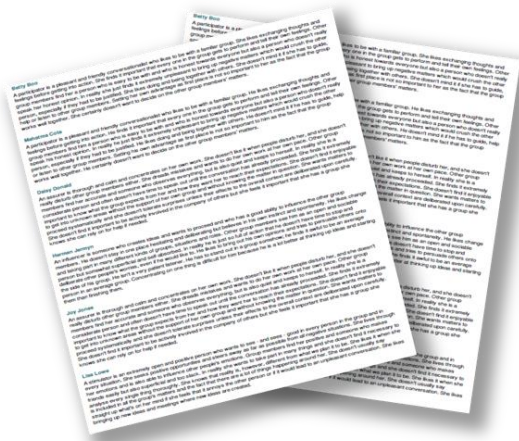
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# Team & Build:

## Team and Build Analysis

### Team Roles Pages

Gives an overview of each of the team members' team roles - discussing their likes and dislikes within a team environment and how others in the team might see them.

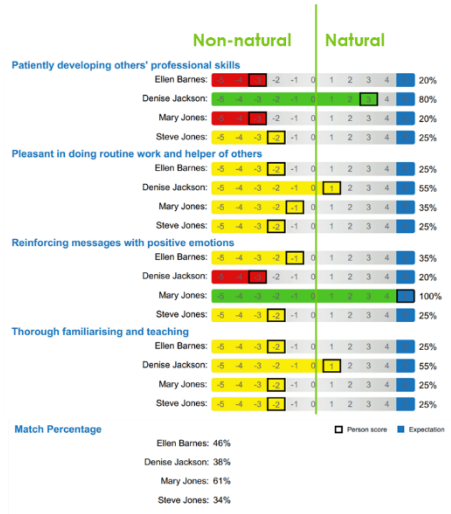


### Behavioural Competencies

This is an example of how behavioural competencies can be read against a Diamond (on a scale of -5 to +5).

- Competencies rated 0 to 5 are more natural traits and consume less energy.
- Competencies rated 0 to -5 are less natural traits and consume more energy.

Custom-build a Team Report and select the competencies YOUR business focuses on.





# Lead & Manage

## Module Three

# Lead & Manage: Introduction

## Introduction to Lead & Manage

In this module, we learn how the different styles lead, and introduce some of the other FinxS® tools for enhancing the understanding of Leadership and Management styles. These include the Extended DISC® Work Pair Analysis, which highlights information that can be useful for recruitment, succession, and conflict resolution.

The leadership vs management debate

What makes a leader unique

Leadership Cultures

How the DISC styles like to be lead

Leadership Tools – Leadership and Work Pair Assessments,  
360 Feedback Reports

Flexibility Map – the comfort zones of your team

The standard Team Analysis Report content

## The Difference Between Leadership and Management

Leadership and management overlap. However, they are not considered to be the same thing. A **leader**, also known as an enhancer, influences, inspires, and motivates people toward achieving organisational success. In comparison, a **manager**, also known as a driver, controls work, plans, organises, and coordinates people toward achieving organisational goals.

We know that leadership and management are different, but there are crossovers. There are many definitions of what a manager and a leader are. Some would describe both as leaders, but one has a driving or task focus, while the other enhances and has a people focus. But what is agreed, is that *both* management and leadership styles are needed to be an effective leader; one complements the other. Both are essential, but often one comes more naturally than the other. Leaders encounter many different people and situations; they need to learn to be flexible and be able to adapt to both environment and people. Extended DISC® recognises the differences between management and leadership styles and attests to the importance of knowing which type you have a natural tendency for.

### Leadership

"Great leaders don't blame the tools they are given. They work hard to sharpen them."

- Simon Sinek

### Management

"Management is about arranging and telling. Leadership is about nurturing and enhancing."

- Tom Peters



# Lead & Manage: Situational Leadership

## Situational Leadership

So, is there an ideal style for a leader? No, any style can be a leader. Each individual leader is unique with their own strengths and development areas. Each person they are leading has their own behavioural style and expectations too! Therefore, different situations require different interactions and behaviours – hence the name ‘situational management’.

Situational Leadership Theory is a model created by Paul Hersey and Ken Blanchard in the late 60s. It encourages leaders to be adaptive to their surroundings. In situational leadership, it's for the leader to change their style, not for their team to have to adapt to them! A leader's style may change continually to meet the needs of others in the organisation, based on the situation.

- Different situations and tasks require different interactions and behaviours – this is more natural for some styles than others
- ‘Best fit’ leaders are those whose style matches the role requirements and who can modify their leadership and management styles to suit the situation at hand.



## Extended DISC® Leadership Cultures

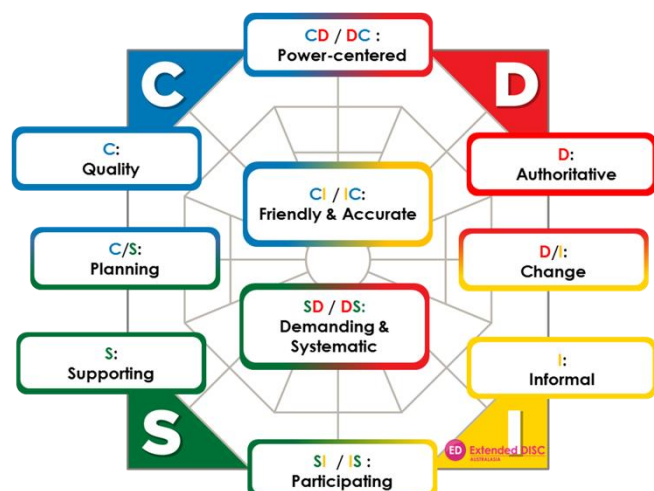
Leadership styles contribute to team and organisational culture. Understanding how your natural leadership style informs the culture can provide powerful insights into how others perceive you as a leader.

There is no best fit for an “Ideal Leader;” they come from all over the quadrant. Using the Extended DISC® Diamond, we can map where each culture fits and how behavioural style impacts and influences team culture.

### The Leadership Cultures

Let's explore the eight Extended DISC® leadership cultures, remembering that there is no ‘ideal leader’. Leaders come from all over the Diamond.

- Different leadership approaches may be required for different situations and for the types of people that are being managed.
- Self-awareness is vital for a leader – a blend of ‘driver’ and ‘enhancer’ is key.
- Awareness of the Leadership cultures helps with recruitment and the development of individuals and teams.





# Lead & Manage: Leadership Cultures

<b>Authoritative</b> D - Leader in charge	<ul style="list-style-type: none"> <li>• Often based on fear, power and distance</li> <li>• Highly directed – leader tells the followers</li> <li>• Exerts pressure and sets demanding goals</li> <li>• Emphasis on speed and achievement</li> </ul>
<b>Change</b> D/I -Leader as Pioneer	<ul style="list-style-type: none"> <li>• Persuasive, charismatic and friendly</li> <li>• Future orientated – envisioning</li> <li>• Active and energetic - leading by example</li> <li>• Positive and optimistic, creating a positive atmosphere</li> </ul>
<b>Informal</b> I Leader as Friend	<ul style="list-style-type: none"> <li>• Relaxed atmosphere</li> <li>• Creativity, positive energy valued more than accuracy or rules</li> <li>• Personal relationships emphasised</li> <li>• Competitiveness encouraged through inspiration, not pressure</li> </ul>
<b>Participating</b> S/I Leader as Facilitator	<ul style="list-style-type: none"> <li>• Team ethos</li> <li>• Open, friendly &amp; accepting environment</li> <li>• Leader works with their team – no hierarchy</li> <li>• Shared goals &amp; responsibilities</li> </ul>
<b>Planning</b> S/C Leader as Planner	<ul style="list-style-type: none"> <li>• Thoughtful, cautious, structured</li> <li>• Generally operates in known areas</li> <li>• Calm but determined to do things right</li> <li>• Clear communication of expectations and objectives</li> </ul>
<b>Supporting</b> S Leader as Helper	<ul style="list-style-type: none"> <li>• Guides, teaches and develops followers</li> <li>• Emphasis on trust, loyalty and sincerity</li> <li>• Help is mutual – given and expected</li> <li>• No strong goal focus – gradual evolution</li> </ul>
<b>Quality</b> C System as Leader	<ul style="list-style-type: none"> <li>• Emphasis on rules &amp; compliance – not inspiration</li> <li>• Leader is remote – no emotional connection</li> <li>• Systematic approach</li> <li>• Ensures everyone knows what is expected</li> </ul>
<b>Power-centred</b> C/D Position has Authority	<ul style="list-style-type: none"> <li>• High individualism, leader is remote</li> <li>• Formal, hierarchical environment</li> <li>• High standards, conformity is expected- zero tolerance</li> <li>• Rigid structures, inflexible and slow to react</li> </ul>
<b>Demanding - Systematic</b> D/S Leader with Experience	<ul style="list-style-type: none"> <li>• Prefers to base their authority on their experience</li> <li>• Solves issues by adopting a convincing approach</li> <li>• Convinces others that their experience makes them right</li> <li>• Prefers a participative approach but can become demanding</li> </ul>
<b>Friendly - Accurate</b> I/C Leader as Explainer	<ul style="list-style-type: none"> <li>• Helpful</li> <li>• Focuses on explaining the importance of rules and standards</li> <li>• Focuses on people and training as a way of leading</li> <li>• Enjoys role when team member seeks advice as they can provide an explanation to help</li> </ul>

[illegible]

# Lead & Manage: Leadership and the DISC Styles

## Leading the Extended DISC® Styles

The DISC styles require different levels of support and interaction with their managers. Let's explore what the different DISC styles are irritated by, their relationship to their supervisor and how they can be effective as leaders.

### D STYLES



#### Irritated by

- Inefficiency
- Indecisiveness



#### Relationship to Supervisor

- Respects (when no overlapping responsibilities)
- No respect at all (competitive situation)



#### Effective as a Leader if they

- Would ask their direct reports for the topics to be discussed.
- Would let their direct reports develop solutions.
- Would avoid being superior.
- Would avoid talking about negative issues.

### I STYLES



#### Irritated by

- Boredom
- Routines



#### Relationship to Supervisor

- Doesn't oppose
- Protests by neglecting responsibilities (late, errors etc.)
- Likes a good connection



#### Effective as a Leader if they

- Would make their own goals clear.
- Would follow up.
- Would have the patience to listen to their direct reports.
- Would also discuss negative issues.

### S STYLES



#### Irritated By

- Dishonesty
- Impatience



#### Relationship to Supervisor

- Trusts (trusts them on matters of reliability and communication)
- Needs clear instructions



#### Effective as a Leader if they

- Would express their own opinions more clearly.
- Would hold on to their own opinions.
- Would refrain from getting involved in chatter and avoiding the issues.

# Lead & Manage: Leading the DISC Styles

# C STYLES



## Irritated by

- Surprises
- Unpredictable situations



### Relationship to Supervisor

- Same as to other employees (doesn't need a connection with them)
- Seeks safety from conflicts and new situations



## Effective as a Leader if they

- Would emphasise positive issues.
- Would talk about their own feelings and thoughts.
- Would not appeal to the rules of the discussion and to other people.

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# Lead & Manage:

## Exercise – A Poor Team Atmosphere

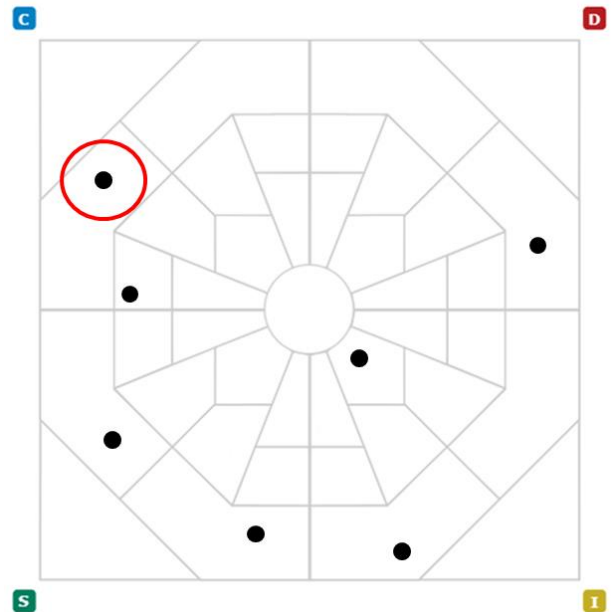
### A Poor Team Atmosphere

Circled in red is the manager of a dental practice.

She manages a practice of six staff – four dental specialists and two administrators. Their styles can be seen on the Shotgun Map. The manager is liked and respected; she works hard and strives to make decisions that will maintain business growth and keep people happy, when possible.

However, for some reason the atmosphere is poor in this practice and a couple of staff members have even threatened to leave.

1. What kinds of issues could be causing this? (Think of her style of management / her DISC style)
2. How could she improve the team atmosphere?



**What kinds of issues could be causing this? (Think of her management / DISC style)**

**How could she improve the team atmosphere?**

**How could she motivate the various team members?**

**Any other observations that might help?**

# Lead & Manage: Leadership Tools

## Leadership Tools

There are many tools available via the FinxS® platform to help you improve your leadership performance. These include the following:

### The Lead & Manage Report

The Extended DISC® Lead & Manage report is based on the model of situational leadership. It draws on the distinction between a Manager and a Leader. The report includes:

- Leadership & Management Cultures
- Flexibility and 4Q Diamonds
- Leadership and Managerial Styles
- Leadership and Management behavioural competencies
- Tips

### 4Q Leadership Diamond

The Leadership Diamond includes text relating to the various leadership behaviours of the different styles.

#### Questions we can ask when analysing the Diamond:

- What is your natural leadership style?
- Are there areas that you need to make a conscious effort to remember?

### 4Q Management Diamond

The Management Diamond includes text relating to the various management behaviours of the different styles.

#### Questions we can ask when analysing the Diamond:

- What is your natural management style?
- Are there areas that you need to make a conscious effort to remember?

### Leadership Tips

Using your FinxS® account, you can add further information to reports including tips for leading an individual in various situations -

#### Tips Include:

- Leading an individual when the team is forming
- Leading an individual when the team is stable
- Leading an individual when the team is in crisis

### Team and Build Analysis

The Team and Build analysis is also applicable to leadership development. We can use the report to analyse the following:

- What kind of Leadership Culture does the leader have compared to the team?
- Is it the right kind of Leadership approach for the team type?
- How does it benefit / challenge the individual team members?
- What kind of team type do you have? (Is it right for the situation?)
- Are there gaps in the Team Roles that need to be filled? (Consult the Shotgun Map)
- Do all the team members understand the team goals? (Consult the Arrow Map)
- Compare the Competencies to discover the team members' natural strengths.

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# Lead & Manage: Leadership Tools

## Team Roles

Understanding the different roles of your team is important for understanding the leadership styles you may need to adopt.

## Team Profile Trends

Are there any Special Cases in your team members' Profiles?

## The Work Pair Analysis

The Work Pair Analysis is a tool that combines the results of two or more individuals into one report. The Work Pair Analysis:

- Maps their natural and adjusted styles on one Axis and one Diamond
- Pinpoints potential challenges and conflicts
- Allows for easy comparison of communication styles
- Makes similarities and differences clear

### Common uses of the Work Pair Analysis:

- Conflict management
- Succession planning
- Performance management
- Training needs' identification
- Leadership and management development

## Leadership Behavioural Competencies

We can analyse leaders at a deeper level by looking at their behavioural competencies. These tell us how a leader naturally communicates, delegates, makes decisions and much more.

Analysing these competencies reveals where a leader may need further training and support.

## Open 360 Assessments

Open 360 is a tool that provides feedback on an individual's performance.

- It is used to measure the skills, competencies and behaviours of that individual.
- It combines an individual's self-assessment with feedback from managers, peers and direct reports anonymously into one report.
- It can be used to map specific paths in an individual's performance and development.

### Common uses of 360 Assessments include:

- Performance appraisals
- Performance management
- Team evaluations
- Training needs' identification
- Leadership development
- Skills development

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# Lead & Manage:

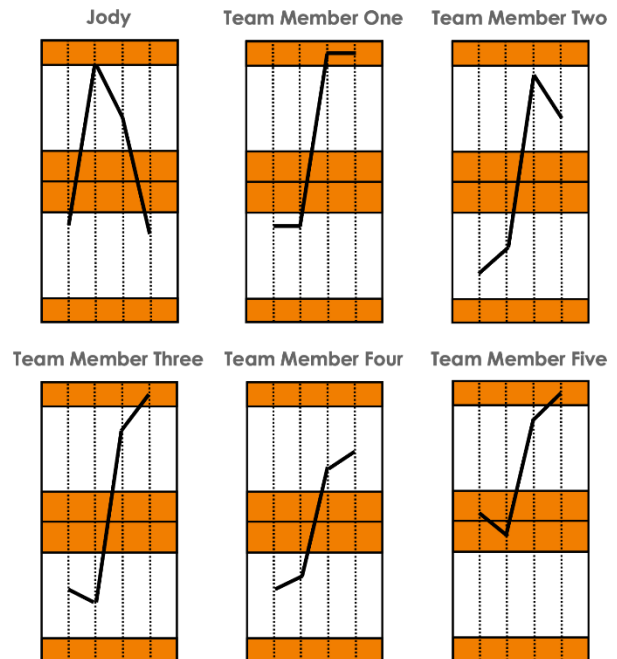
## Exercise – Leader of an Accounting Team

### Leader of an Accounting Team

Jody is head of an accounting department. She likes to be with people and thinks positively about her organisation. All her team are SC or CS styles.

**Answer these questions in the space below:**

- What is Jody's natural management style?
- What might her team members like and not like about her style?
- How could she improve her management style for this particular team?



Describe Jody's natural management style and how this might look in practice.

Explain what her team might like and not like about her style.

Suggest how she could improve her management style for this particular team.

# Lead & Manage:

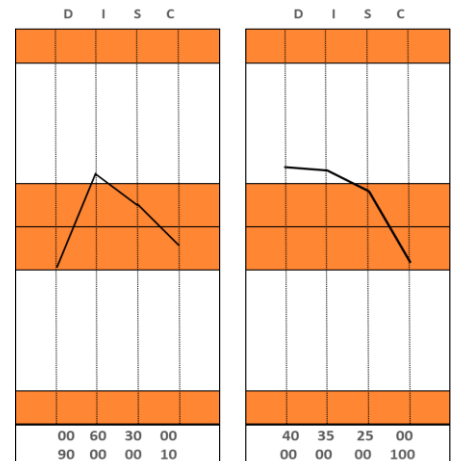
## Exercise – Motivating Special Cases

### Motivating Special Cases

Analyse both pairs of Profiles and outline in the spaces below how you as a manager could motivate and help these individuals to become more effective.

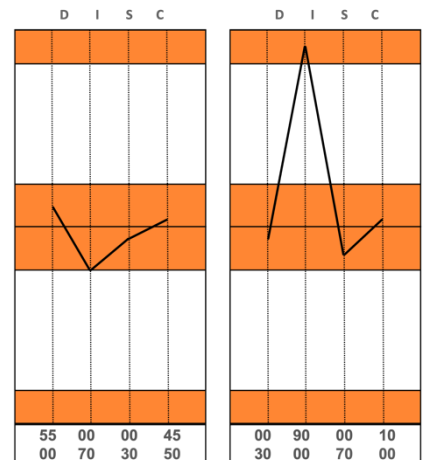
#### Frustration

Question: How would you help this person to become more effective?



#### Uncertainty of Role

Question: What would you do to motivate this person?







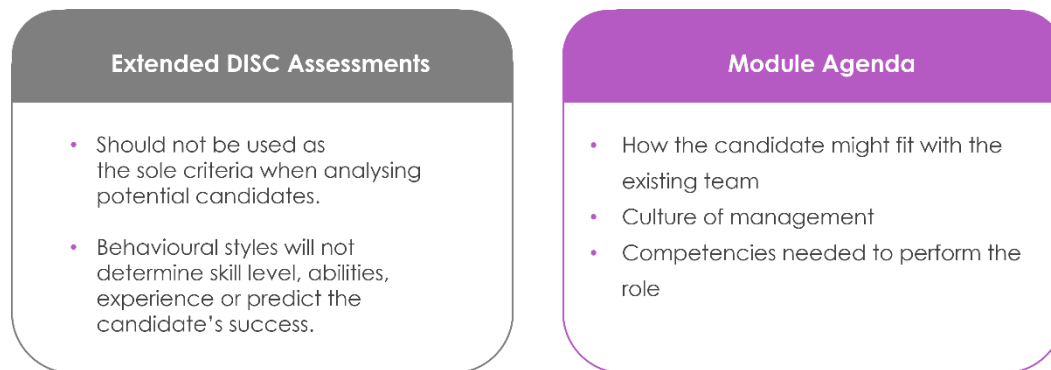
# Recruit & Select

## Module Four

# Recruit & Select: Introduction

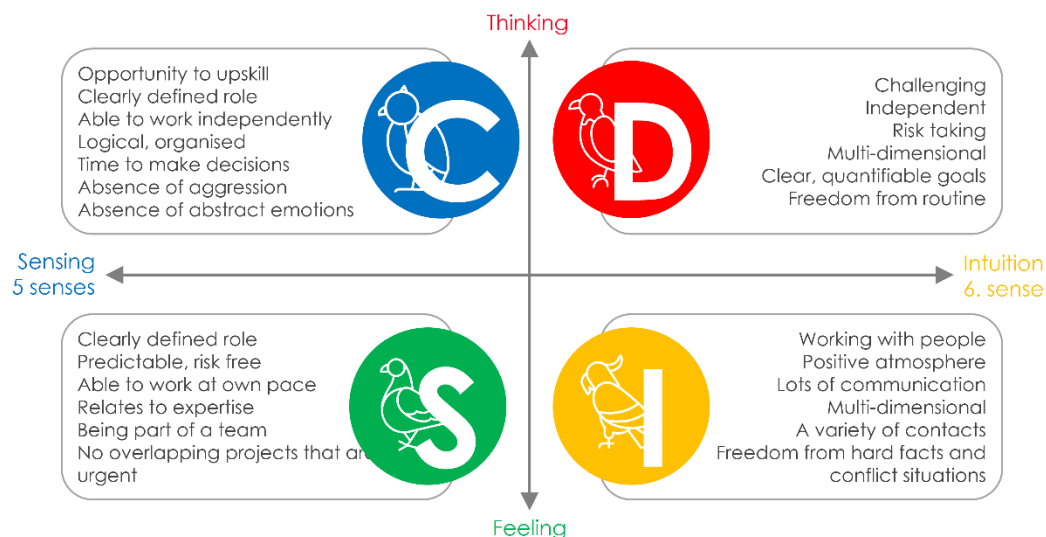
## Introduction to the Recruit & Select Module

There are several recruitment assessment tools an HR or recruitment manager can use during the recruitment and onboarding process to identify and develop top talent, including a DISC assessment. Extended DISC® Recruit & Select Assessments allow you to analyse behavioural fit against key role requirements. The reports provide a clear understanding of an individual's natural behavioural style and the types of tasks and activities they feel comfortable undertaking. These factors are hugely valuable when evaluating a candidate's fit for a role. They allow you to identify, in advance, how the candidate will fit in with the team, where their strengths are, what may cause them stress, and where they may need additional support.



## The DISC Styles' Preferred Work Environments

Your DISC style can help in the identification of your preferred work environment. Using the Extended DISC® assessment, you can evaluate whether a fast-paced career or a slower pace of work may better suit your DISC style. The results also provide insight into other behavioural factors, such as your motivators, preferred work environment, and ideal manager. Let's explore the preferred work environment of the different DISC styles.



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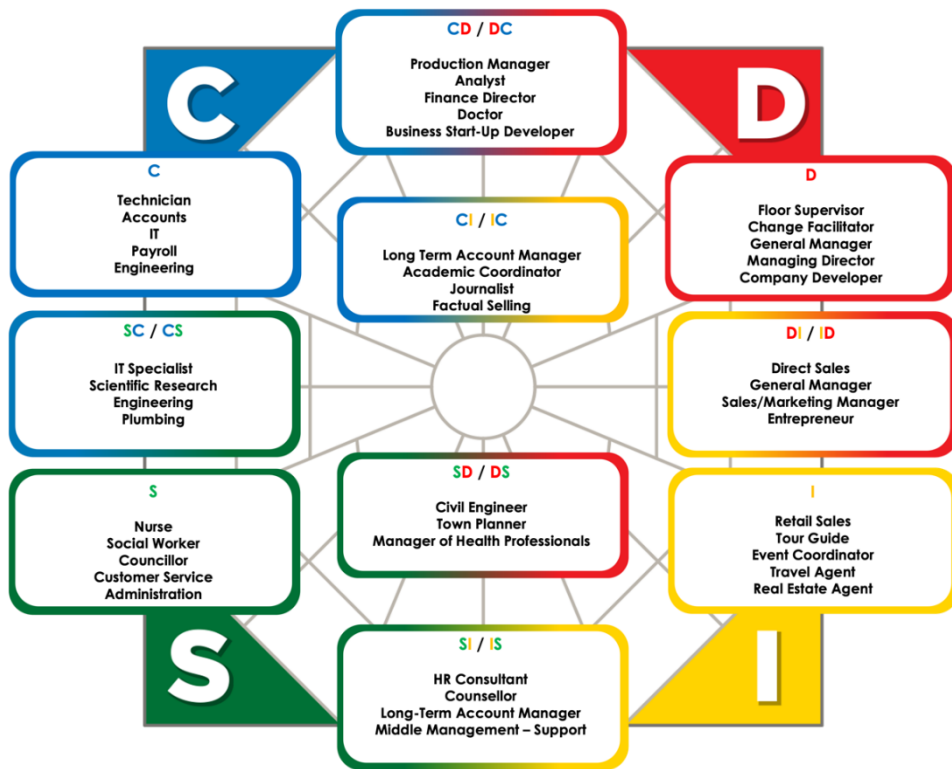
# Recruit & Select: DISC Careers

## The Extended DISC® Styles and Popular Career Choices

Aligning your natural behavioural strengths with career requirements can help you select a career that suits you. You are more likely then to enjoy your chosen career and excel in that area quickly and easily. Understanding your DISC style can be of great benefit when seeking a job that accommodates your preferences and tendencies.

It's important to note that your DISC type does not limit your career opportunities in any way. Any DISC style can do anything. DISC assessments simply help you understand what behaviours will take energy and which come naturally to you.

Below you can see some careers and industries that align with the behavioural strengths of the different DISC styles.

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# Recruit & Select: The Six Basic Shapes

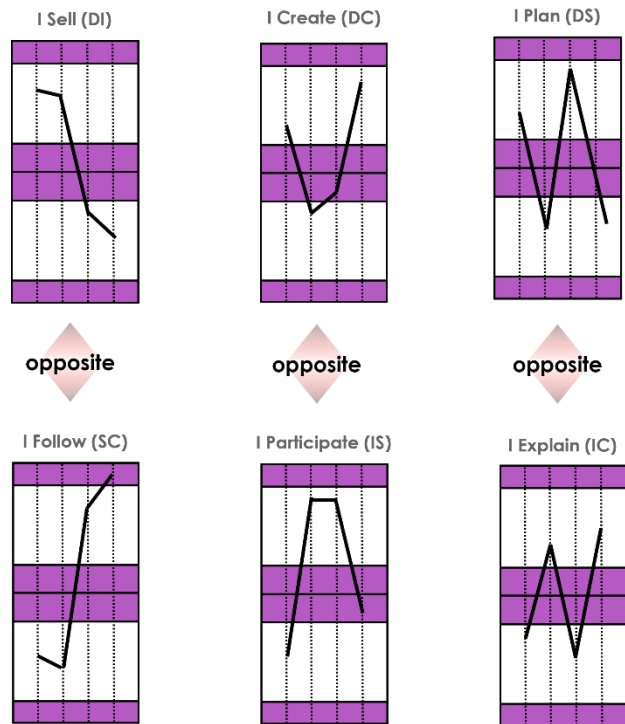
## The Extended DISC® Six Basic Shapes

Let's look at the shape of Profile II. The shapes of profiles can create recognisable patterns, show behavioural attributes and indicate job 'fit'.

There are a number of Profile II shapes that can help us identify a candidate's behavioural style and their innate makeup at a glance.

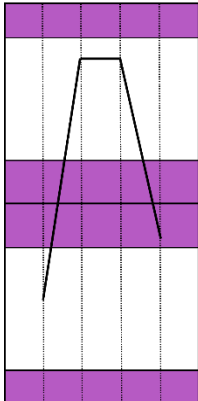
### The Six Basic Shapes are:

- I Sell = DI profile
- I Follow = SC profile
- I Participate = IS profile
- I Create = DC profile
- I Plan = DS profile
- I Explain = IC profile

This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

# Recruit & Select: The Six Basic Shapes

## I Participate (IS)



### 1. Strengths

Good people relations  
Helpful towards teammates  
Positive discussions  
Open and friendly atmosphere  
Good at encouraging  
Looks for ways to improve job satisfaction  
Thinks about others  
Doesn't need to control

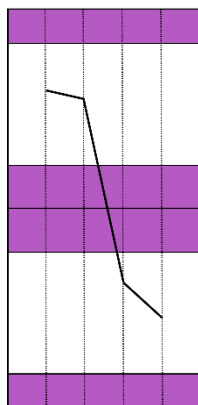
### 2. Ideal job

Counsellor  
Public Relations  
HR Consultant  
Telephone sales  
Middle Management or support coordinator  
Sales: Long term account management  
Chiropractors  
Hospitality

### 3. How to motivate

Work environment with no quarrels  
Open atmosphere  
Working together  
Appreciation & being valued as a person  
Considerate and planned progress  
Working for the common good

## I Sell (DI)



### 1. Strengths

Can excite others  
Can set goals  
Generates new ideas  
Drives change  
Is competitive  
Acts independently  
Big picture focused  
Communicative

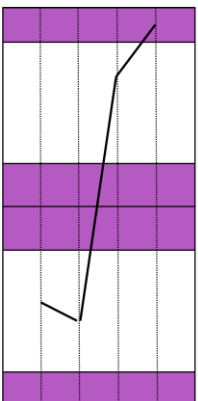
### 2. Ideal job

Direct Sales (The Hunter)  
General Manager (Sales)  
Sales and Marketing Manager  
Education: Campus Manager or  
Head of School  
Artist  
Leading own company

### 3. How to motivate

Set big goals targets  
Give them an opportunity to  
meet new people  
Provide them with feedback  
Independent tasks  
Freedom to make their own  
decisions

## I Follow (SC)



### 1. Strengths

Is focused  
Is a team player  
Stays focused for a long period  
of time  
Is reliable  
Is steady  
Follows instructions

### 2. Ideal job

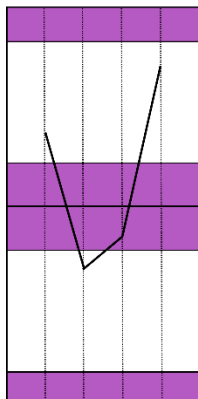
Technical roles  
I.T. networking, support or software  
Design  
Scientific research  
Engineering  
Plumbing  
Accounting

### 3. How to motivate

Stable environment  
Opportunity to upskill  
Knowing what is expected of  
them  
Clear instructions  
Time to complete tasks  
No interruptions or surprises

# Recruit & Select: The Six Basic Shapes

## I Create (CD)



### 1. Strengths

Goal orientated  
Can create systems and processes  
Can manage complicated matters  
Works independently  
Ensures tasks are performed correctly

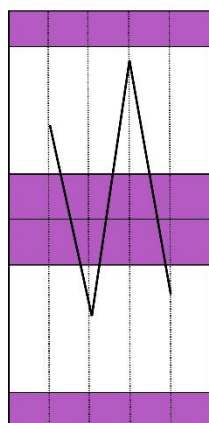
### 3. How to motivate

Give them a chance to create and develop  
The opportunity to upskill  
Independent decision making  
A variety of tasks  
Freedom to be in control

### 2. Ideal job

Project or Production Manager  
Quality Manager  
Analyst  
Finance Director  
Large-firm Company Secretary  
Doctor  
Chef  
Often involved in company creation

## I Plan (DS)



### 1. Strengths

Develops systematically  
Logical and precise  
Knows when to think, knows when to act  
Is outspoken  
Is resilient

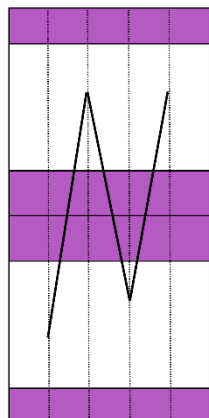
### 3. How to motivate

Measurable goals  
Independent work  
Control of one's own tasks  
Opportunity to plan and develop  
Secure and logical sequences

### 2. Ideal job

Civil engineer  
Government/Bureaucratic institutions  
Managing teams of counsellors/health professionals i.e., District Health Boards

## I Explain (IC)



### 1. Strengths

Can explain complicated matters  
Can excite others  
Respects rules and regulations  
Looks for new ways to do things  
Can adjust to new situations  
Is enthusiastic

### 3. How to motivate

Positive work environment  
Varying people contacts  
Being able to exchange ideas  
Dynamic work environment  
Being able to help and guide others

### 2. Ideal job

Long-term Client Account Manager  
Academic Coordinator  
Positions that involve factual communication  
Area Surveyor for supply company  
Factual 'selling' where products need explanation

# Recruit & Select Exercise

## Recruitment of a General Manager

### Recruitment of a General Manager

An, **I Sell** (DI) style is the new manager of a retail store and has a vision of how the business should be run and how people should behave. All his employees are **I Participate** (IS).

Think of what the **I Sell** style's employees might like and dislike about his management style.

**Like:**

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**Dislike:**

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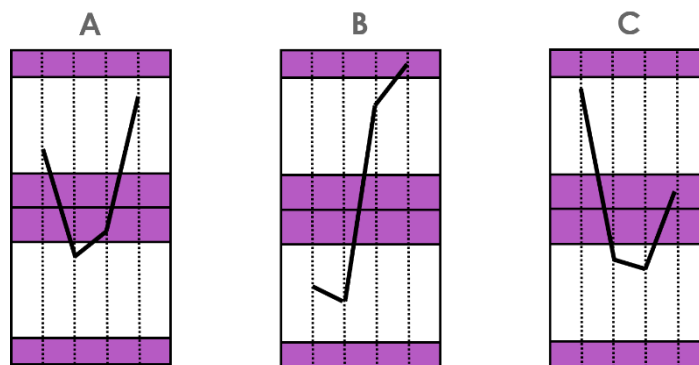
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# Recruit & Select Exercise

## Vacant Role

### Job Description for a vacant role

A sales position has become available in your company. You have not yet advertised the position, but three of your existing employees have already approached you and expressed their interest in the job. They are all good performers, and you would like to keep them in their current positions. How would you communicate to them that you believe they wouldn't feel comfortable with the job requirements of the sales position? How will you ensure they remain motivated to stay in their current positions?



	How to communicate to the person that they may not feel comfortable in the sales position	How to ensure each employee will stay motivated in their current position
Profile A		
Profile B		
Profile C		

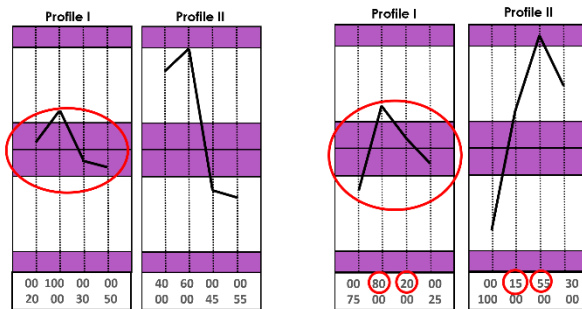


# Recruit & Select: Debriefing Tips

## Debriefing Tips When Recruiting

There are specific areas of the Report we tend not to emphasise for various reasons. These include Profile I and the Arrow Map.

Generally in recruitment, we don't need to put as much emphasis on Profile I



Self Promotion – **I Style emphasised**



Hasn't yet identified with or adjusted to the job role



Reaction to change – **S Style de-emphasised**



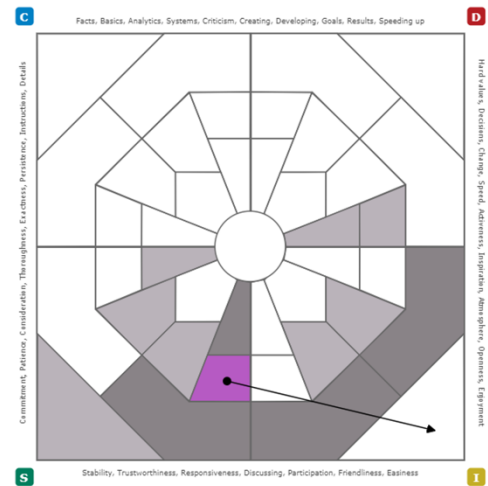
Profile I can be influenced by their current/previous role (**Special Cases**)



Uncertainty about new role – **Tight Profile I**

Generally in recruitment, we don't need to put as much emphasis on the Arrow Diamond

The adjustment on the Arrow Diamond might be stretched (often toward the I but not always) as the candidate is promoting themselves for the job and often operating outside of their comfort zone.



# Recruit & Select: Using the Shotgun Map

## Using the Shotgun Map for Recruitment

The Shotgun Map is one of the most informative tools you can use when it comes to recruitment. Here's why:

Shows where **the candidate might fit** in relation to the existing team = communication, conflict, action, strengths...

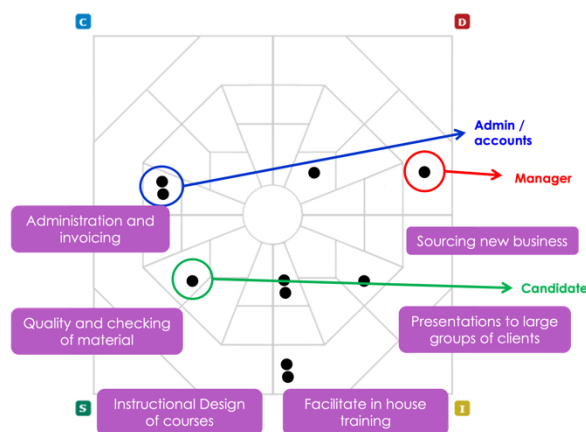
When designing or **restructuring a team**, it will help to show **people placement** gaps and overlaps

Can highlight the **TEAM ROLE** they might naturally take

Shows what **challenges** the candidate (**and leader**) might face if hired.

Highlights **training needs**

Sample Company: Training Team



### Potential Questions:

#### Behavioural Style and Key tasks

1. What key tasks are expected of the candidate?
2. What are their natural strengths/development areas?
3. Could there be training gaps / needs?
4. What motivates and demotivates the candidate?

#### Management

1. How would they like to be managed?
2. What relationship do they need with their manager?
3. What type of management culture would the manager tend to naturally adopt?
4. What environment does the candidate prefer?
5. What challenges might there be for the manager?

#### Team design

1. What Team Type do you currently have?
2. What about if you hire them?
3. What Team Role might they adopt?
4. Is this a good fit for others in the team?
5. Are they a 'lone wolf'?

# Recruit & Select: Using the Recruit & Select Report

## What the Recruit & Select Report Tells Us About a Candidate:

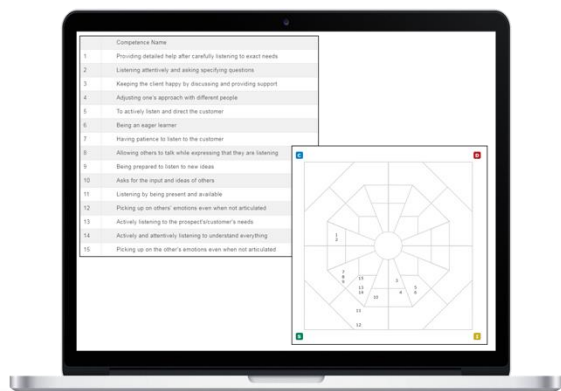
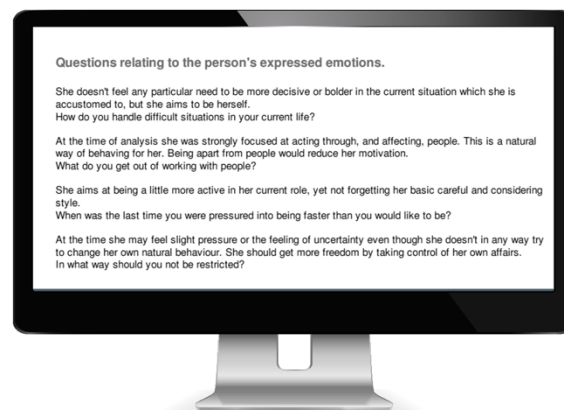
- Their preferred work environment i.e.: challenging, variety etc.,
- How they will most likely communicate and interact and situations that motivate and demotivate them
- Expressed emotions (Special Cases)
- Behavioural Questions relating to their Expressed Emotions
- Strengths and development areas
- How their natural behavioural style relates to the new role
- The way they like to be managed
- Decision making, causes of stress and more

## What the Recruit & Select Report Doesn't Tell Us About a Candidate:

- Their intelligence or IQ
- Their specific skills or experience
- Their attitude
- Their company knowledge
- Any upskilled self-development areas

## Using the Questions Relating to Expressed Emotions

The Suggested Interview Questions found on the final page of the Recruit & Select Report relate to the candidate's role and take the form of a statement with a relating question. These are useful questions to use in a recruitment interview if you want some guidance based on the DISC styles. The questions are based on the candidate's profile II and can be used to uncover further information about them in the interview and how they handle certain situations.



## Using the Job Templates (pp. 12-17)

Job Templates are a great recruitment tool as they allow you to match a candidate's style to the requirements of the role.

Not all of the competencies in the Recruit & Select Report will apply to the role you are trying to fill. Therefore you can:

- Highlight the competencies that do relate and see how the candidate has scored.
- Create a job template specific to the role. This enables you to select your own competencies. There are over 1500 competencies available in the FinxS® Platform.

# Recruit & Select: Reasoning Analysis

## Cognitive Ability Test

A cognitive reasoning assessment measures a person's working speed and accuracy in terms of thinking and reasoning. Candidates with high cognitive ability can generally perform work tasks more accurately and efficiently, make effective decisions, use their reasoning skills to solve problems and respond intelligently to new or complex issues. A cognitive ability test allows you to:

- Get the big picture of the reasoning capabilities of key staff
- Predict Job Performance
- Do initial candidate screening for positions of influence, management, and development
- Analyse individual results against a Global or Australasian Benchmark (or create your own Company Benchmark)

*N.B. We recommend you choose only 2-3 of the most relevant tests.*

There are nine reasoning tests available. These are:

- Abstract logical – this measures an individual's ability to understand different concepts and identify their interrelationships.
- Logical processing – this analyses an individual's ability to understand cause-effect relationships.
- Spatial reasoning – this measures the individual's ability to comprehend visual entities and their components.
- Social reasoning – this measures the individual's general sensitiveness in observing social phenomena.
- Numerical reasoning – this measures an individual's ability to spot relationships and patterns in numerical information.
- Verbal reasoning – this measures a person's ability to understand written information, conceptualise it and find causal relationships.
- Mathematical logical reasoning – this evaluates a person's ability to interpret and criticise statistical information.
- Word association – this measures an individual's ability to rely on written information to understand relationships between different concepts.
- Visual memory – this is the ability to remember and process relevant visual information.

### Report Construction

1 Theoretical introduction

2 Overall Scores

3 In-depth Interpretation of Scores

4 Benchmark Comparison

The content presented is a speed vs accuracy analysis of the answers to the questions contained in each of the nine reasoning tests. **The results of the Reasoning Analysis should not be the only criterion used when making personal decisions.**

They should be treated as a **complementary source of information** useful for improving an individual's personal and professional effectiveness.

# Recruit & Select:

## Exercise - Shotgun Map for Recruitment

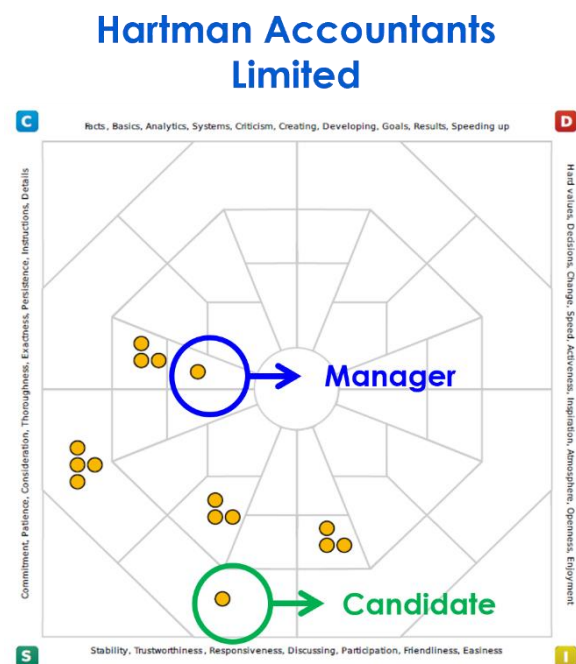
### Using the Shotgun Map for Recruitment

You are a consultant and you've just been to a meeting with Hartman Accountants Ltd.

They've told you about their need for a New Business Development executive to join their team. They feel that the company has become stilted and even been a bit reluctant to move into the modern world of accounting. They think a fresh, more direct approach to new clients, and sales in general, is just what they need. They want someone with vision, ideas and big-picture thinking as well as somebody who's comfortable making quick and tough decisions. They also feel it's important that this person fits in with the existing staff; they know that there could be some downtime when team members will need to connect with this new person.

There are already two other New Business Development executives in the existing team, and they do get new clients on board but not as often as initially expected. They tend to be a little reluctant at times to network or close the deal, so growth of the company has slowed.

The Manager (blue circle) is worried about recruiting an outside person as he doesn't like conflict and unrest in the workplace, therefore would much rather recruit one of their existing staff internally. All the same, he has gone ahead and interviewed several outside people, and has identified a particular candidate that he got on reasonably well with (the green circle) and is reasonably happy to take further steps with. However, his preference is still to recruit internally.



As the consultant, you've been asked about the suitability of this candidate and also to identify any internal recruits for the New Business Development role.

Knowing the manager is a C-style and will need facts and evidence to back up what you say, you went ahead and asked all the staff members to complete an Extended DISC® Behavioural Analysis Team Report. The results are shown above.

How are you going to approach this and what are you going to recommend?

### Analyse this case and devise some answers around these areas:

1. The candidate's behavioural style
2. The candidate's team role
3. The manager's leadership culture
4. Challenges and strengths for both candidate and manager
5. Tasks and expectations of the role vs the candidate
6. Type of Team
7. Why these issues might be happening in the company
8. Why the manager felt comfortable with this candidate

# Recruit & Select:

## Exercise - Shotgun Map for Recruitment

**Analysis / recommendations**

# Recruit & Select: The On-Boarding Report

## The On-Boarding Report - Content

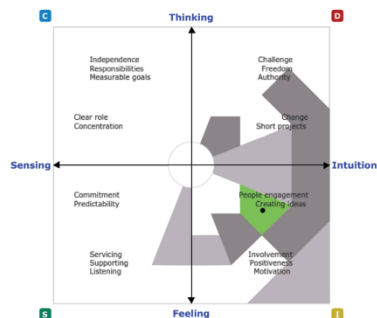
Extended DISC® assessments allow you to understand how to best support your new employees to help them feel valued in a new workplace. Using the insights, you can ensure your new employees are engaged, motivated and productive from the very beginning of their employment with your organisation. You can identify a candidate's pressure triggers to help reduce workplace stress and recognise learning and development needs to optimise workplace performance.

Extended DISC® Assessments provide you with the behavioural style of the employee. You will have information on their behavioural strengths, how they communicate and make decisions, what motivates and demotivates them, etc. You can use this information to help communicate effectively and create clear performance expectations.

Be patient with your employees. On average, it takes about 8 months for an employee to reach their full potential. Consider what happens when you fail to retain employees. Those 8 months push out to 10 months +, because it takes time to recruit and rehire.

### Report Content

- Ideal Manager / Leader
- Learning Styles
- Preferred Job Content
- Stress Competencies



# Recruit & Select:

## Exercise – On-Boarding a C Style

### On-Boarding a 'C Style'

You have recently hired a new team member and have identified them as a High C DISC Style. You have put their results against an Extended DISC® On-Boarding Report to facilitate your induction process.

Some important considerations you need to look at are:

- Your new team member's ideal working environment
- Management Considerations
- Recognising their stress indicators

Make some notes about these factors below and how you will build them into your on-boarding process to help you communicate effectively and to create clear performance expectations.

<b>Ideal Working Environment</b>
<b>Management Considerations</b>
<b>Stress Indicators</b>





# **Sales & Service**

## Module Five

# Sales & Service: Introduction

## Introduction to the Sales & Service Module

The Sales and Service module looks at the Extended DISC® Sales and Service assessment. In this module we look at the different behavioural styles and what sort of selling, or even customer service, each is most suited to. We also look at how salespeople can identify the behavioural style of their customer or prospect and tweak their sales pitch to enhance the sales process and motivate a buying decision.

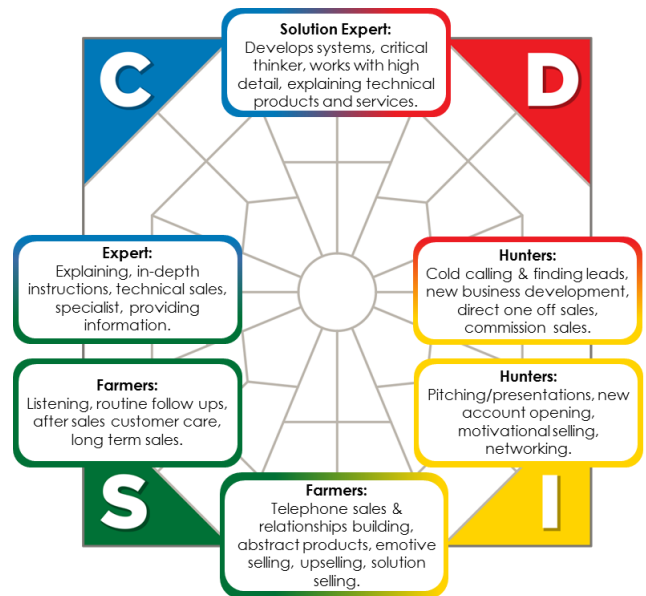
## What is Sales?

The selling process involves creating a relationship, identifying needs, providing solutions and above all else closing the sale. The best salespeople mix emotions with facts in the right proportion and that's where Extended DISC® can really help.

## The Extended DISC® Sales Types

Remember there is no right or wrong DISC profile for selling! Some people just tend to suit different 'types of sales' more naturally. The Extended DISC® Sales Types are:

- **Hunters** – cold calling, new business and results driven
- **Farmers** – relationship selling and emotive selling
- **Customer service** – problem solving and upselling
- **Technical sales** – explanations, instructions, and detail
- **Solution Experts** – developing systems, high detail products and services, and strategic sales

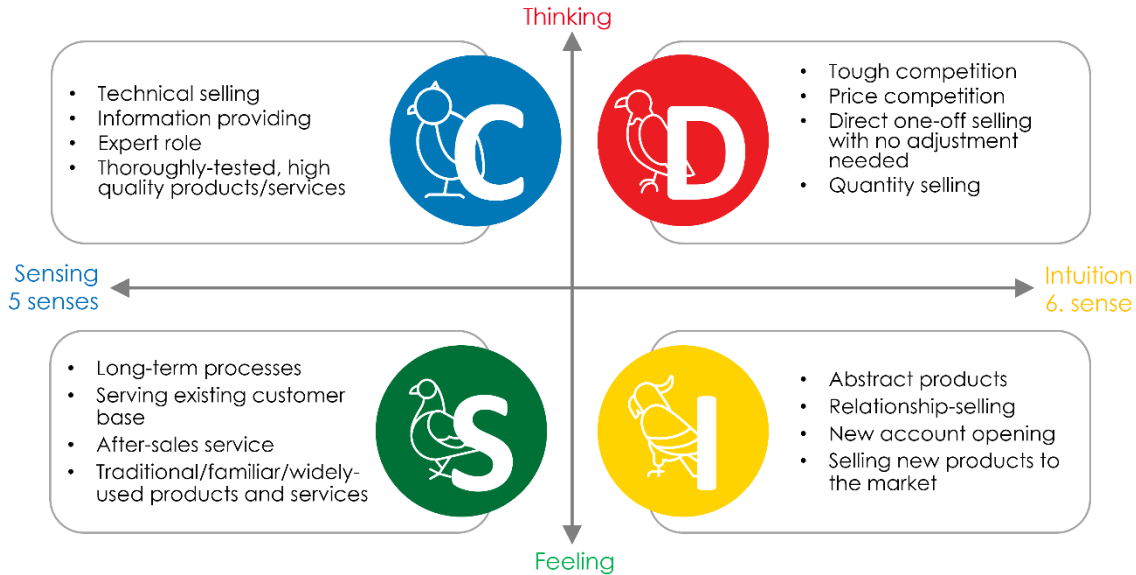
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# Sales & Service: Sales Fit

## Matching Styles with the Ideal Sales Fit

We can match the Styles to sales roles to leverage their natural behavioural strengths. However, when matching salespeople to the ideal role, we also need to consider the needs of the customer, the length of the relationship and the complexity of the sales cycle.

Achieving the perfect sales fit will depend on the product or service as well as the type of role. Some Styles are better with latent rather than expressed need, long rather than short-term relationships; others are a natural in a fast or complex sales cycle.

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on the right side, suggesting it's resting on a surface. There is no handwriting or other markings on the paper.

# Sales & Service: Selling to the Styles

## Identifying and Selling

Being able to identify the four primary DISC Styles is an important part of selling to them. Once we can identify the Styles, we can learn how to adjust our communication to build rapport and sell to the needs of our customers.

### How to Sell to a D Style

- Match their style and tone - be direct, ask them specific questions.
- Don't waffle, get to the point - too much talk will irritate them.
- Provide alternatives – limit it to two if possible.
- Work with their motivators - remember image/status is important, let them feel like a pioneer, early adopter or leader if they buy.
- What's in it for them!!
- Don't be emotional with them.
- Don't dominate the conversation as they need to talk and control.
- Act quickly - they decide fast so ASK for the sale!
- Take away complexities and make it easy – do the paperwork for them.



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### How to Sell to an I Style

- Don't race straight into selling – take time to chat socially, speak about people and feelings.
- They enjoy sharing stories - reciprocate by telling a few stories back.
- Focus on the BIG picture – not too many details.
- Let them talk – they need to contribute to the interaction.
- Help them achieve popularity or recognition – compliment when needed.
- Ask for the sale – "Would you like me to organise this for you?"
- Be expressive and enthusiastic.



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# Sales & Service: Selling to the Styles

## How to Sell to an S Style

- Focus on people and use real people examples.
- Slow down your presentation – don't go at a hectic pace.
- Build trust by showing you are listening – ask questions and keep quiet.
- Be sincere - don't forget promises and don't be unreliable.
- Provide the information they need – have facts and proof ready.
  - Offer guarantees, instructions, extra services.
- Secure commitment piece by piece – get them nodding.
- Remember motivators like fairness and family issues.
- Don't force them to make quick decisions.



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## How to Sell to a C Style

- Listen carefully – try not to interrupt.
- Provide facts and evidence – be thorough.
- Give plenty of detailed information – especially written material.
- Find out the key issue and focus on that.
- Don't crowd their physical space – avoid touching them.
- Be patient - allow them time to think.
- Stay still and avoid excessive gesturing.
- Don't talk about personal issues.
- Don't pressure them.



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# Sales & Service Exercise

## Motivating the Styles

### Factors that Motivate the Styles' Buying Decisions

In the blank spaces below, jot down some factors you believe would motivate the buying decisions of the four different DISC Styles.


# Sales & Service: Case Study

## Sales Approach – Case Study

A couple walks in and starts to look around. The man starts carefully reading all the leaflets and materials, slowly going from one spa to another. He doesn't look up to engage your eye contact. He starts to press buttons and move the jets around to see how they work. Then you see him reading about the guarantee that's on a ticket by the spa and also about payment options.

His wife, on the other hand, is chatting away and enthusiastically hopping in and out of spas to sit. She's smiling and talking to him about how the kids would love the radio in it, and that she likes the colour and style of several of the spas. She meets your eye and says 'Hello' to you with an animated wave. She hasn't read over the materials at all, though she has looked at the prices and is persuading her partner that a spa is what they need for the family even though it costs more than they thought. 'Think of the wonderful family time we'll have!!', you hear her say. You hear him mention to her calmly that he doesn't know what other costs may be involved with the running of a spa, what maintenance might be needed or what chemicals, so it may not be that easy and then he goes silent. They both then look at you.

**1. What do you think the styles of each of them might be?**

**2. What are their concerns?**

**3. What kind of FABs might you bring into the sales process?**

**4. What is your approach going to be with this couple?**

# Sales & Service: Case Study

## Sales Approach – Case Study

A customer walks in, who has been in once already a few weeks ago, and he is looking at several of the top spa pools. You have identified him to be an S-style and you would like to close the sale today. For some reason, he seems to be procrastinating in choosing which spa he wants.

You're fairly certain that you provided him with enough information verbally the first time, by going over the details of at least 10 spas and talking briefly about the gadgets each one had. In fact, afterwards, you told him that all the spa brochures were over by the counter for him to go and look at, as you had another customer to serve. But for some reason, he seems to be stalling still. You think he's had a spa previously but can't remember the story. You know he wants one or he wouldn't have come back. Why is he not committing? What could help him?

**1. What are the key words for this customer's behavioural style?**

**2. How would he NOT like to be approached or sold to?**

**3. What could his motivation factors be for buying a spa?**

**4. How will you need to adjust your approach or sales pitch to his S-style?**

**5. What might you mention or do to close the sale?**



# Sales & Service Case Study

## Ski School – Repeat Business

### Increasing Repeat Business at a Ski School – Case Study

#### Challenge

John was employed to work with over 100 ski instructors at a large ski resort. He was brought in as the resort had identified that most first-time ski students did not sign up for any additional lessons. The goal was to generate more class registrations and revenue.

The ski instructors comprised a vast range of ski enthusiasts, from 18-year-olds to retired professionals. They were all fantastic skiers, but not all were skilled communicators. John knew he would have to involve everyone to resolve the issue. He wanted to increase the self-awareness of each individual of their own behavioural tendencies. For example, I-Style behavioural ski instructors often spent a lot of time chatting and they tended to run late! – Although these instructors didn't see it as significant, it did not set a good tone for the start of the next lesson and sometimes made it impossible to capture new business.

John helped the ski instructors to understand that they bonded easily with those of a similar behavioural style but were not as comfortable and successful with differing behavioural styles. Students had expressed some dissatisfaction with the classes and felt that they did not connect with their instructor. To make matters worse, the instructor, sensing tension, often gravitated toward the students they preferred. The end result being that the ski instructors came away feeling exhausted and the students feeling dissatisfied and unhappy.

#### Outcome

John developed simple but brilliant guidelines – the ski instructors had to work on building a rapport with all students. The instructors learned a few effective ways to identify the different DISC behavioural styles. Most importantly, they were taught how to modify their communication styles to better connect with their students. Initially, it took some effort, but soon it became a lot easier and almost second nature.

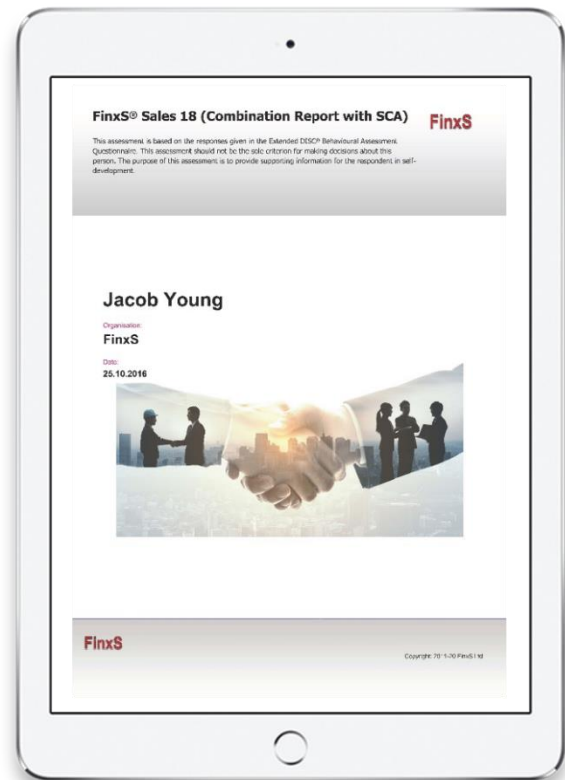
John then focused on training the class reservation instructors. They learned to ask specific questions and actively listen for cues to identify the customers' DISC style. They then placed the student with an instructor of a similar DISC style. This made the instructors' work a little easier. Results – the revenue from ski lessons increased by 23% in year one, 26% in year two, and 28% in year 3.

# Sales & Service: FinxS® Sales 18

## What is the FinxS® Sales 18

The FinxS® Sales 18 Report is based on the DISC model and theory and uses the same 24 questions as other DISC assessments. You can reorder this assessment against any existing DISC results in your FinxS® account. The FinxS® Sales 18 Report delivers information about the person's hardwired and natural comfort levels against 18 important sales competencies. The information in the report helps to define a clear development plan for the coach, manager or the salesperson to identify and implement.

- It can be combined with the Sales Competence Assessment or used alone.
- It identifies natural, hard-wired DISC behavioural tendencies in 18 sales competencies.
- It identifies an individual's unique sales strengths and development areas.
- It analyses whether or not a sales professional is using their full potential or performing better than predicted.



## What are the 18 Competencies?

There are 18 sales competencies that are critical to sales success, and each is clearly defined in the report and further deconstructed into the behavioural competencies that feed into the sales competencies.

A salesperson does not need to focus on all 18 competencies as they are not equally important to everyone, or to every sales role at the same time.

### FinxS Sales 18 – Sales Competencies

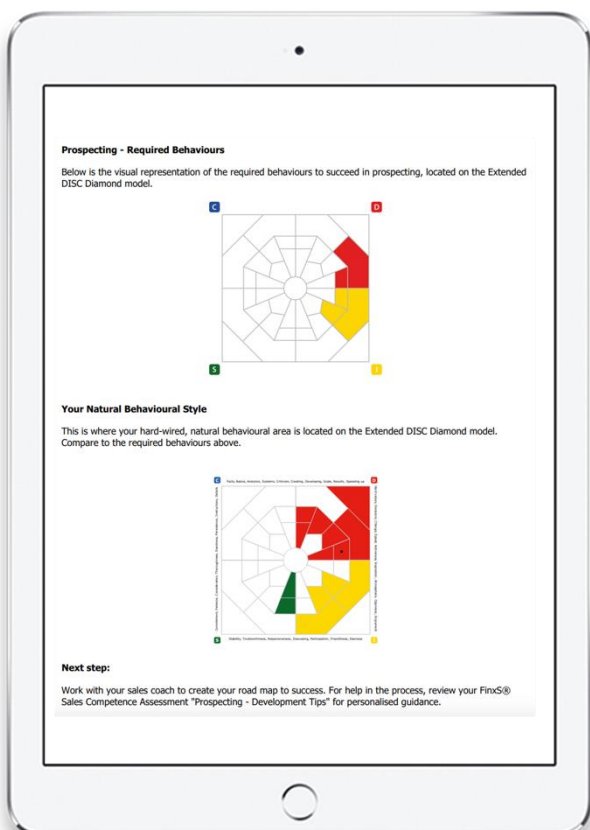
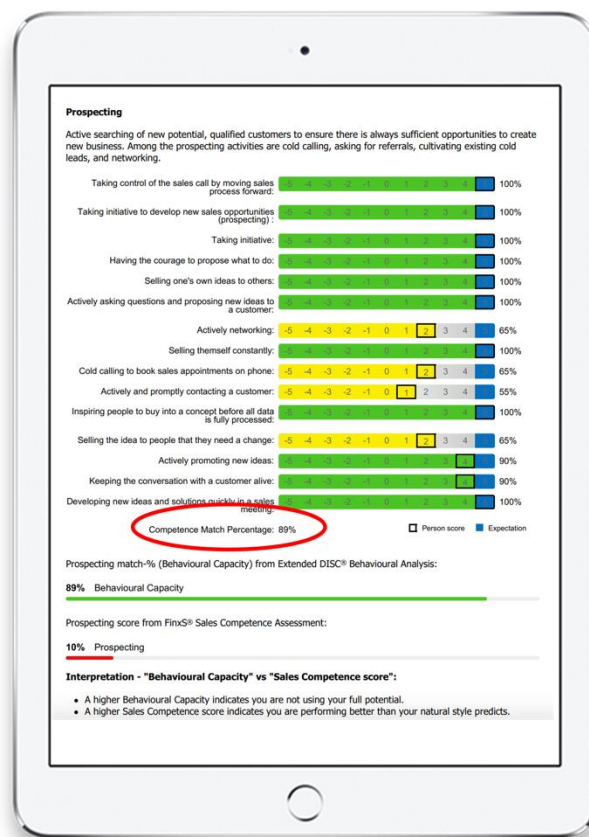
- |                                  |                                |
|----------------------------------|--------------------------------|
| 1. Prospecting                   | 10. Active listening           |
| 2. Qualifying                    | 11. Critical thinking          |
| 3. Building rapport              | 12. Initiative                 |
| 4. Process orientation           | 13. Presenting                 |
| 5. Goal orientation              | 14. Time management            |
| 6. Need for approval             | 15. Dealing with failure       |
| 7. Controlling the sales process | 16. Determined competitiveness |
| 8. Handling objections           | 17. Money concept              |
| 9. Questioning effectiveness     | 18. Emotional distance         |

# Sales & Service: FinxS® Sales 18 Report Format

## Behavioural Competencies

There is one page for each of the 18 sales competencies. Each sales competence is further broken down into behavioural dimensions. Each behavioural dimension shows an expectation score of "5" (highlighted in blue). However, no one will ever score "5" on every competence. Rather, the expectation scores are the ideal or target scores that are compared against the person's natural behavioural style (the boxes with black borders). This sample salesperson has an 89% match percentage for prospecting, which means they identify prospecting as being naturally comfortable. They should use it as it is a strength, but they should also be careful not to overuse it, given they are so comfortable with it.

A sales competence strength is defined as having a match percentage score higher than 66%. Low percentage match scores, below 33%, mean the sales competence will require energy and adjustment from the salesperson.



## Flexibility Zones

There are a further 18 pages – one for each sales competence that identify the behaviours needed to succeed in that competence and which compare them to your natural behavioural style.

The top Diamond provides a visual representation of where the required behaviours to succeed in the competence are located on the Extended DISC® Diamond.

The bottom Diamond shows where your hard-wired, natural behavioural area is located on the Extended DISC® diamond.

You can then compare your natural flexibility to the required behaviours.

[illegible]

# Sales & Service: FinxS® Sales Team 18 Report Format

## FinxS® Sales Team 18 Reports

Sales Team 18 Reports are also available. We can view the information in several ways:

1. As a match percentage only
2. As a team details table
3. As a comparison between the Flexibility Zones and Name Map

### Competence Match Score Report

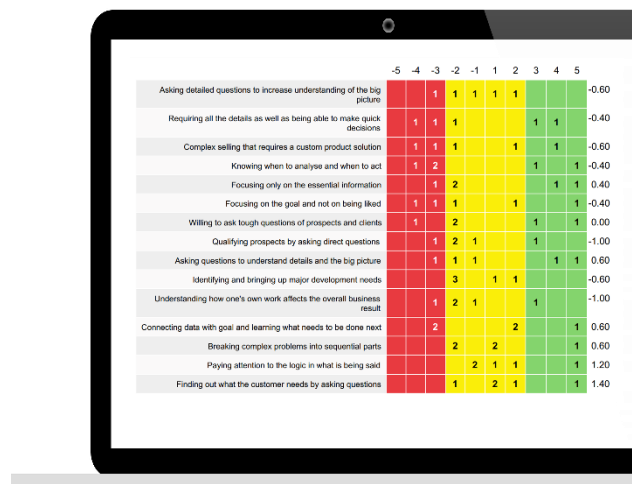
The match percentage bars summarise the sales competence scores of each of the team members.



### Competence Match Table Report

The table indicates the number of team members with different match scores for the behavioural competencies.

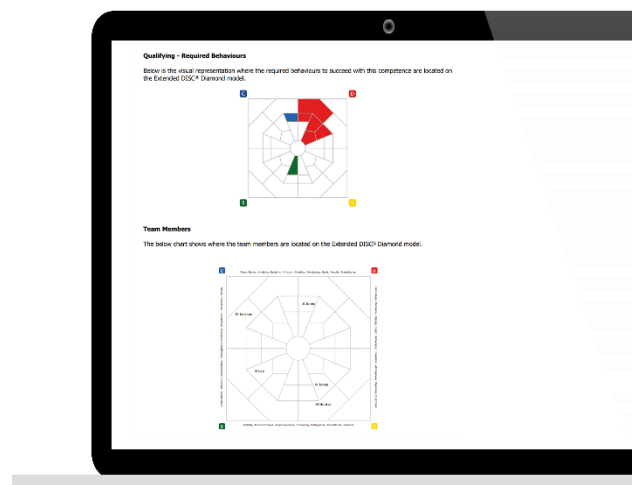
This report also provides a description of what a team with a high average match score looks like and what a team with a low average match score looks like.



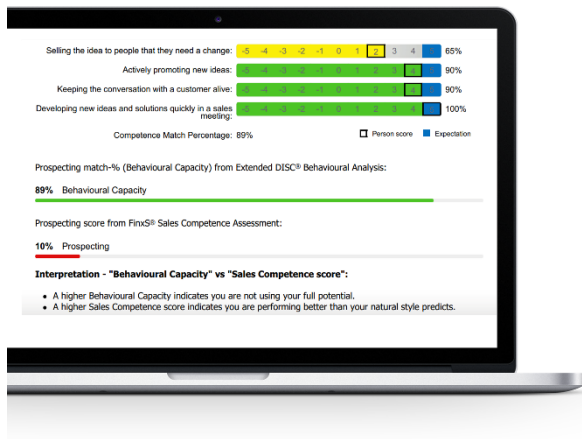
### Name Map Report

The Sales Team 18 Name Map Report provides a visual representation of where the required behaviours to succeed in each competence are located on the Extended DISC® Diamond model.

The Name Map provides a comparison of where team members are located on the Diamond.



# Sales & Service: Sales Competence Tool



## Sales Competence and Sales 18 Combination

This report includes clear instructions for analysing the results.

One glance at the coloured bars will tell you if the salesperson is not using their full potential or, conversely, if they're performing better than predicted.

These areas become opportunities for coaching and training. For example, this person has a high natural behavioural capacity for prospecting but has scored low in the sales competence assessment. This indicates that the person may not be using their full potential, either because they do not need that competence in their role or because they require further training and support.

## Sales Competence Tool

The Sales Competence Assessment measures the skills and competencies of salespeople in 18 areas, critical to their job performance. The test also reports on their mindset toward sales and their tendency to make excuses on the job.

Sales Competence Reports highlight areas in which an individual may need development. The practical coaching tips and development plans provided in the assessment help to jump-start sales development and progress.

- NOT DISC Based – Entirely different tool
- Consists of 99 forced questions
- 20 - 30 minutes to complete
- Measures the attitude of the respondent towards key behaviours in the sales process
- Measures perception of their current sales competencies
- 18 critical sales competencies
- Mindsets
- Excuse Index
- Sales Cycle
- Match Percentage to 8 different Job Roles





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