

Individual Assessment

This assessment is based on the responses given in the Extended DISC® Individual Assessment Questionnaire. This assessment should not be the sole criterion for making decisions about oneself. The purpose of this assessment is to provide supporting information for the respondent in self-development

Brian Taylor

Organization:

FinxS

Date:

11.21.2013



Introduction to Your Assessment

Brian, you have undoubtedly realized that your success is determined in a very large part by how well you interact with other people. Your ability to effectively relate, communicate, influence and motivate others is a crucial skill in succeeding in your profession and creating successful, long-term relationships with customers, prospects, colleagues, subordinates, managers, friends and family members.

You have probably noticed it is very easy to get along with certain people. You almost instantly and effortlessly understand the other person. The communication just flows. It is a lot more than just mutual understanding of what is being said. It is as if the person sees you and the rest of the world in very similar terms. When it happens, everything is easier. Think about the last time it happened. Wasn't it effortless and uncomplicated?

Unfortunately, with most people interactions take more effort. They do not flow as easily. You cannot quite understand where the other person is coming from, what they really want, and what their intentions are. You may also have an uncomfortable feeling the other person is experiencing the same. You know the outcomes of the interaction are not quite what you want. You are likely to feel disappointed, frustrated and even tired. It takes energy, effort and concentration. Still, the results are not what you hoped they would be.

In these situations you probably feel there is something you could do, but are not quite sure what that is. You know your end goal – your destination – but are not sure how to get there. It is like being lost without a map.

Brian, this Extended DISC® Individual Assessment will provide you with the map to more successful interactions with others. You will learn:

1. The four main human behavioral styles.
2. Who you are and how others perceive you.
3. How to read other people and better understand them.
4. How to adjust your communication style to achieve your goals.

Very Brief Background of the Extended DISC® Model

The Extended DISC® System is based on behavioral theories that have been used for over 90 years. The power of this model is that it is easy to learn, understand, and use because it identifies only four behavioral styles of individuals.

People can be divided in four main styles by identifying if they are more:

1. People- or Task-oriented.
2. Reserved or Active.

The resulting four styles are called:

D-style (Dominance)

I-style (Influence)

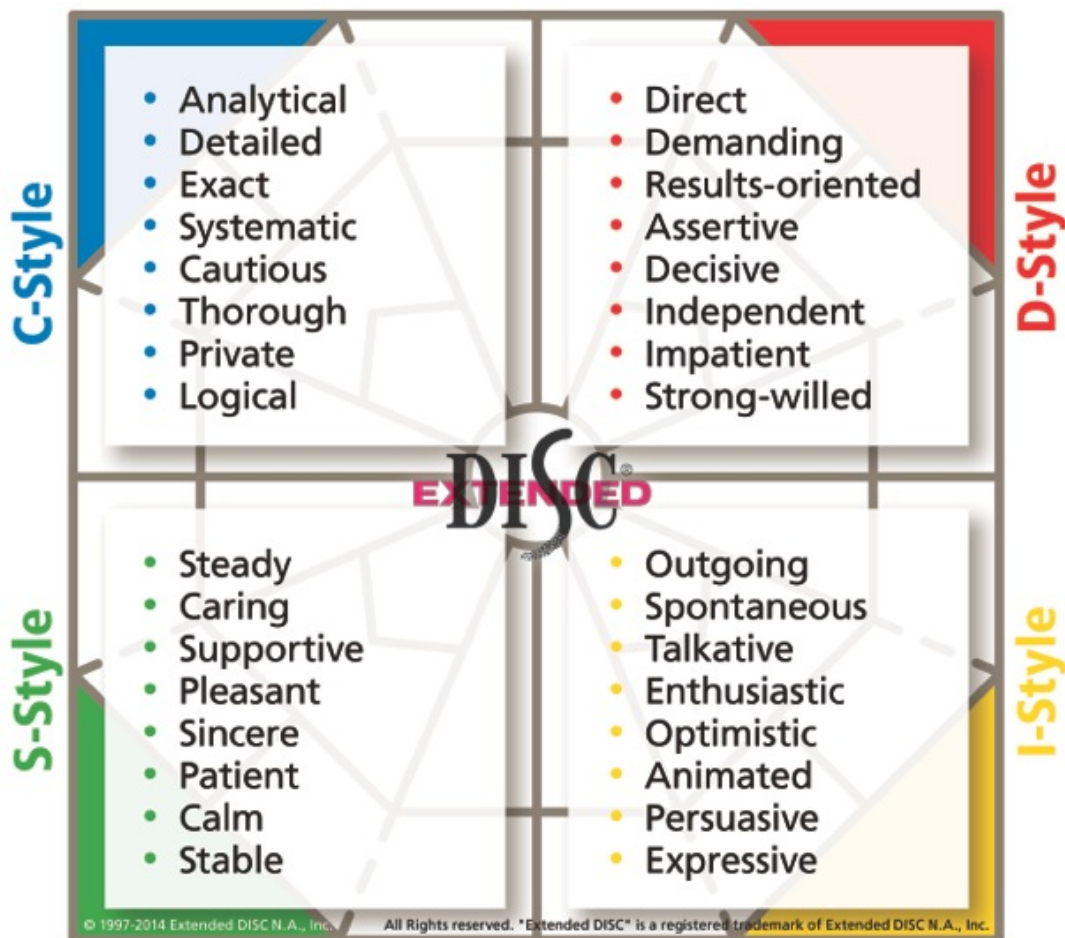
S-style (Steadiness)

C-style (Conscientiousness)

The DISC Behavioral Styles - The Key points:

In the following pages you will learn about the four DISC-styles. As you get comfortable with their own unique traits and tendencies, please keep the following important points in mind:

- None of the styles are better or worse.
- All styles have strengths and development areas. They just happen to be different.
- Your style does not limit what you can accomplish or how successful we can be. It simply predicts how you tend to do things.
- You can find all of the four styles represented by very successful people. However, the most successful people know who they are. They modify their style appropriately with different styles of people and in different situations.



Your Extended DISC® Profiles

The Profiles are a visual representation of your behavioral style. They are based on your responses to the questionnaire. There are no right or wrong answers.

Profile I: Perceived Need to Adjust - Your adjusted style reflects an adjustment that you perceive would help you be successful in your current environment.

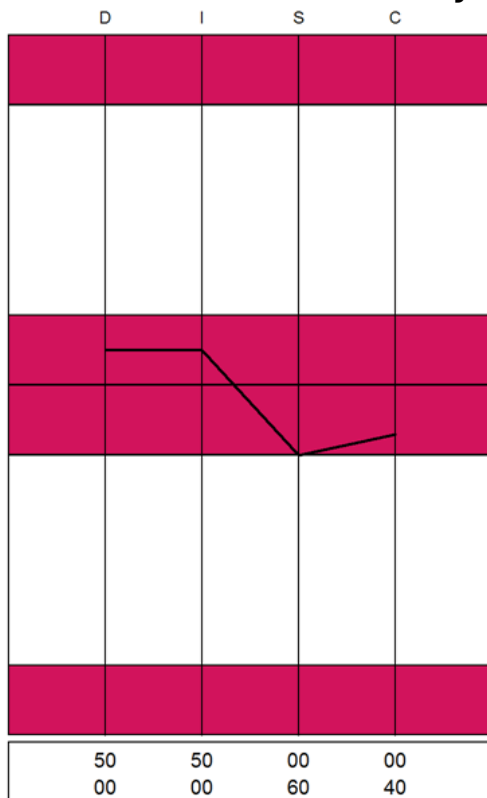
Profile II: Natural Style - Your natural style remains fairly stable, but not rigid, over your adult life. It is the style that is most comfortable to you and uses the least energy. Most individuals are a combination of styles.

The styles (D, I, S, and C) that are above the middle line (=top half of the Profile II) are your natural styles. The styles that show below the middle line means that they require more energy from you.

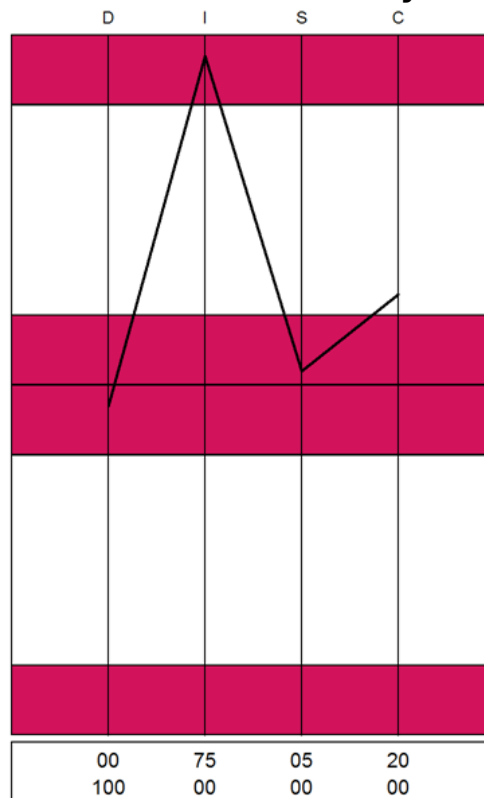
There are no good or bad behavioral styles - just different ones.

Your Profile I and II

Profile I - Perceived Need to Adjust



Profile II - Natural Style



Your DISC style is: ICS (I - 75%, C - 20%, S - 5%)

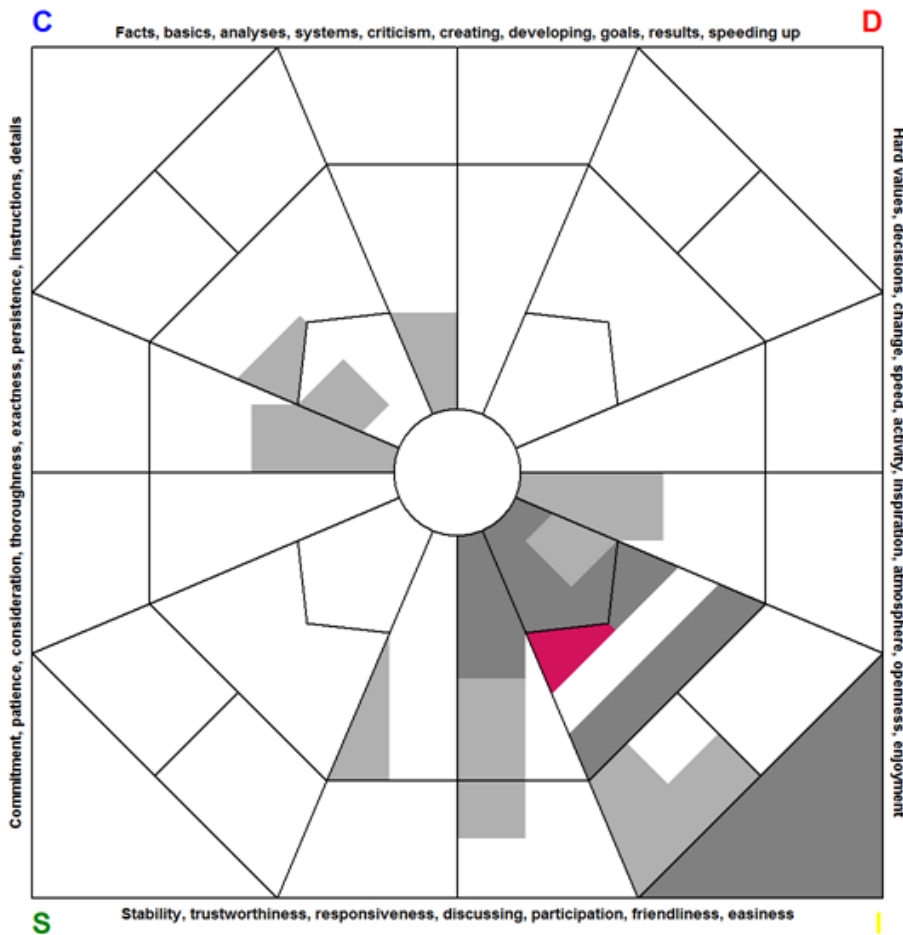
Your DISC Style

The DISC Model is divided into four quadrants: D, I, S and C.

The rectangle identified in color shows the location of your natural style. Determine in what quadrant it is placed. This is your most natural and comfortable behavioral style (D, I, S or C). The shadings demonstrate the behavioral styles that are quite comfortable for you.

The DISC quadrant(s) that have **shading** represent your DISC **comfort areas** or your natural style.

The DISC quadrant(s) that have **no shading** represent DISC styles **requiring more energy** from you.



Brian at a Glance

This page is a description of how others are likely to perceive you. In other words, while the text describes your typical behavior as seen by others, you certainly can modify your behavior to fit the needs of a particular situation and/or individual(s). Also, you may have already addressed the development areas by learning new skills.

Your DISC style is: ICS (I - 75%, C - 20%, S - 5%)

How Others May Perceive You:

Extroverted, people-oriented, open, pleasant, undemanding, helpful, kind, adjustable, exact, follows instructions, easy to approach, emotional, social.

How Others May Perceive Your Communication Style:

He can be relatively active and positive in his communication style, if he is not separated from others nor subdued. He is quite a good, non-aggressive inspirer. He is also good at listening and understanding others, turning their problems into positive possibilities.

How Others May Perceive Your Decision-making:

Emotions drive his thinking and actions. Feelings are also important and he therefore does not try to make very "sensible" decisions. Instead, he tries to please everybody.

Brian's Strengths:

- Likes to be with people
- Participates in different undertakings
- Works pleasantly and reliably
- Takes care of people-relations
- Sociable but also disciplined
- Gets people excited
- Is friendly to everybody
- Discusses positively
- Doesn't always put himself first
- Listens to people's wishes
- Can talk and listen
- Wants to obey the rules

"Knowing yourself is the beginning of all wisdom."

- Aristotle

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Your Motivators

You tend to like and feel comfortable with these items. Are you taking advantage of comfort areas?

Brian enjoys working with people. He likes to make and get compliments. In addition to stability, a secure working atmosphere and good team spirit, he values open relationships and opportunities to work in a positive role. Probably he would like contacts with his team members outside of work as well.

You are more likely to respond positively and feel energized if these factors are present in your work environment.

- Secure and well-explained work with people
- Happy people to work with
- Discussions to clarify matters
- Social acceptance the way one is
- Environment without pressure and rushing
- Using discussions to motivate for obedience of rules
- Honesty among people
- Avoiding crises
- Team goals
- Being neither above nor below others; being equal
- Participating in planning the future
- Participating in different undertakings

Identify two *Motivators* that are being fulfilled in your current position.

1 _____

2 _____

How can you increase their effect on your performance? Be specific.

Situations that Reduce Your Motivation

All of us face situations on a daily basis that we do not like much and tend to drain our energy levels. The items below are likely to decrease your motivation and require more energy from you.

- Quarrels with others
- Stepping on others' toes
- Unpleasant situations or people
- Problems among people
- Unfriendliness
- Interfering in others' matters
- Cold and commanding people
- Having to be all alone
- Insecurity about being accepted
- Having to speak directly about unpleasant subjects
- Taking risks
- People withdrawing into their "shell"

Carefully consider *Situations that Reduce Your Motivation*. Be aware of their impact on making your goals a reality. Are you prone to procrastinate with situations/tasks that correspond to items listed above?

Identify two *Situations that Reduce Your Motivation* that create the greatest challenge in your current position.

1 _____

2 _____

How can you decrease their effect on your performance? Be specific.

Your Strengths

Strengths are items that tend to be easier, more natural and require less energy from you.

- Likes to be with people
- Participates in different undertakings
- Works pleasantly and reliably
- Takes care of people-relations
- Sociable but also disciplined
- Gets people excited
- Is friendly to everybody
- Discusses positively
- Doesn't always put himself first
- Listens to people's wishes
- Can talk and listen
- Wants to obey the rules

Most of us tend to overlook our strengths, even taking them for granted. Do not let that happen to you. Instead, consider the items listed above and think how well you are taking advantage of these valuable behavioral traits. Please use caution however; remember that an overused strength very often becomes a weakness and a serious liability to our performance.

Identify two *Strengths* that you can capitalize upon in your current position.

1

2

How can you maximize the impact of your *Strengths*? Be specific.

Reactions to Pressure Situations

These are NOT descriptions of your weaknesses or present behavior. They are items that you should be cautious about since these reactions in pressure situations may become more evident. Understanding how you react to pressure situations can make it easier to deal with them.

- Tries to please everyone - comes and goes
- Bustles around without progress
- Is friendly also to those one shouldn't be
- Discusses too long, is not effective
- Delays things when trying to avoid quarrels
- Is too kind and allowing
- May disturb the quiet ones by talking too much
- Doesn't take a stand in quarrels
- Is too open with personal matters
- Gives in even when knows the facts
- Wants to be liked by everyone
- Is afraid of stating an opinion voluntarily



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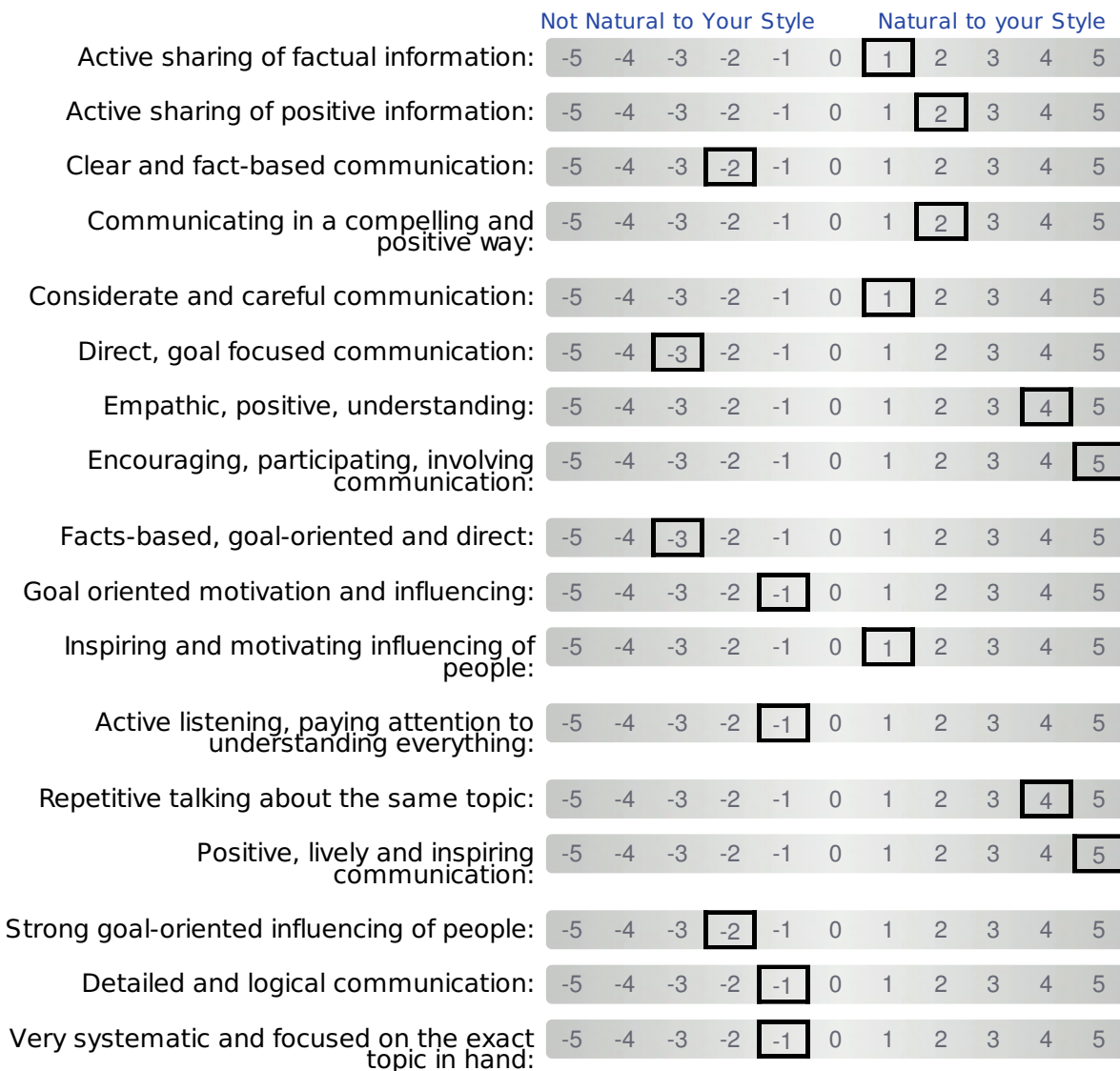
Your Communication Style

We all have our own unique communication style. When we become aware of how we tend to communicate with others, it becomes easier to make conscious modifications to our style. These modifications improve our effectiveness with others.

Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify your preferred communication styles. Be conscious not to overuse them.

The **rectangles to the left side** of the graph identify communication styles requiring more energy from you. You **CAN** communicate this way, but it may require more energy and concentration.



How Others View Your Communicaton Style

Your message and your communication style comes across differently to different people. While you cannot control others, you can be more aware of your natural communication style and how it is perceived by others. Then you can make the necessary adjustments in your interactions with others.

This is how others may perceive your communication style.

He can be relatively active and positive in his communication style, if he is not separated from others nor subdued. He is quite a good, non-aggressive inspirer. He is also good at listening and understanding others, turning their problems into positive possibilities.

Identify an aspect of your communication style that is the most comfortable for you. What impact does it have in your current position? How can you capitalize on it more effectively?

Identify an aspect of your communication style that is the least comfortable for you. What impact does it have in your current position? What can you do to improve?

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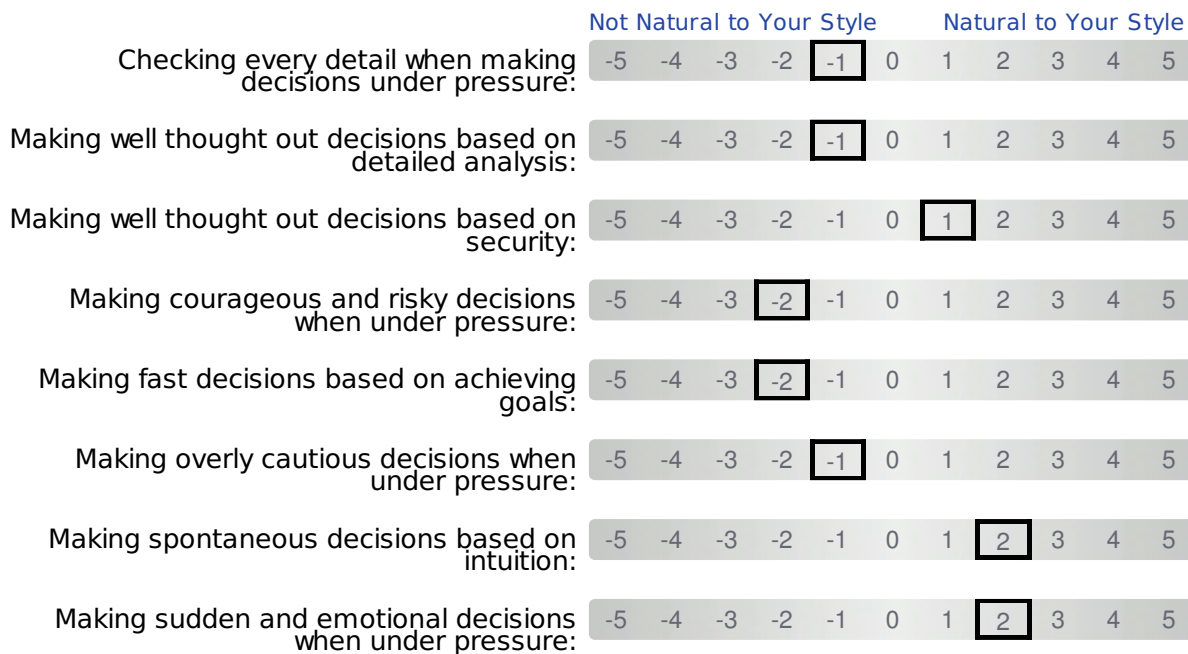
Your Decision-Making Style

There is no best style for making decisions. However, we all have our own most comfortable way of decision-making. Successful people are aware of their preferred style and make conscious adjustments based on the requirements of each unique situation. Listed in the bar graphs below are a few of the most commonly requested decision-making traits.

Interpreting the bar graphs is simple:

The **rectangles to the right side** of the graph identify your preferred decision-making styles. Be conscious not to overuse them.

The **rectangles to the left side** of the graph identify decision-making styles requiring more energy from you. You **CAN** make decisions this way as long as you concentrate more.



***"It is understanding that gives us the ability to have peace. When we understand the other fellow's viewpoint, and he understands ours, then we can sit down and work out our differences."
- Harry S. Truman***

How Others View your Decision-Making Style

No matter what you do, others will have their own perceptions of your behavior.

This is how your decision-making style may come across to others.

Emotions drive his thinking and actions. Feelings are also important and he therefore does not try to make very "sensible" decisions. Instead, he tries to please everybody.

- Cautiously and willingly gives responsibility to others
- Emphasizes the meaning of information
- They want to hear everybody's opinion first

Identify an aspect of your decision-making style that is most comfortable for you. What impact does it have in your current position?

Identify an aspect of your decision-making style that is least comfortable for you. What impact does it have in your current position? What can you do to improve?



Your Role in a Team Environment

Frequently, we have to work with others to achieve common goals. Teamwork can be enjoyable, yet challenging. By becoming more aware of how we tend to behave in team settings - and how others perceive us - will improve our performance.

Your attitude to teamwork:

- A pleasant way to meet people
- A place to ask for and get information
- A means to ensure a good atmosphere remains

Your role within the team:

- The one who corrects errors positively
- Presents a familiar matter in a new way
- Is a team player

How you motivate the team:

- Manages to see things in a positive way
- Guides people and at the same time praises positively
- Brings new ideas

How you perform in the team:

- Wants to avoid errors
- May stay to discuss and think
- Gets bored if the job gets too routine

How you benefit the team:

- Positive energy for pertinent people
- The one who levels down disagreements
- Information for everybody about issues

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How Your Team Members Perceive Your Style

All of us contribute different talents to the overall team performance. Listed below are how others in the team are likely to perceive you.

	Not Likely to Observe					Likely to Observe					
Taking care of the team atmosphere (as a team member):	-5	-4	-3	-2	-1	0	1	2	3	4	5
Moving teammates toward the goal:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Lively team member who involves others:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Making the team work together toward the goal:	-5	-4	-3	-2	-1	0	1	2	3	4	5
People-focused and conscientious doer:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Introducer of a new perspective:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Participative and talkative doer:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Positive change agent, able to eliminate boredom:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Positive guide and advisor:	-5	-4	-3	-2	-1	0	1	2	3	4	5
Determined speeding up of others:	-5	-4	-3	-2	-1	0	1	2	3	4	5

How could you increase your performance in team settings to be even more effective? Be specific.

Becoming a Better Team Member

Brian, below are a few suggestions on how to improve your success in working within a team.

- Create a way to assess each person's contribution
- Think of a reason for each member to be part of the team
- Do not ever stop considering why you do the things you do
- Review things in the order that they actually should happen
- If you are responsible for something, make the decisions - do not let others decide for you
- Learn to bring up difficult things
- Tell others in advance what the goals are

Choose one of the above suggestions that is the most relevant in your present role. How should you modify your behavior to make you even more successful?



How to Identify Others' Styles

Now that you have identified your own style, the next step is to identify the styles of others so that you may then make the most effective adjustments to yours. This is a skill that takes practice, but is easy to learn.

As you become more familiar with the DISC-styles, you will find some people are easy to identify. You will quickly think to yourself: "She is a D-style" or "He is an S-style." These individuals are predominantly one style and can be identified easily.

The rest of the people you encounter will take a little more effort. However, it is a simple, three-step process of identifying your prospect's style:

- Step 1. Observe**
- Step 2. Assess**
- Step 3. Recognize**

Step 1: Observe

When you meet someone, pay attention to traits such as:

- what the person talks about
- how they say it – type of words (e.g. "I" vs. "We"), type of questions (e.g. "what?", "why?")
- body language
- tonality

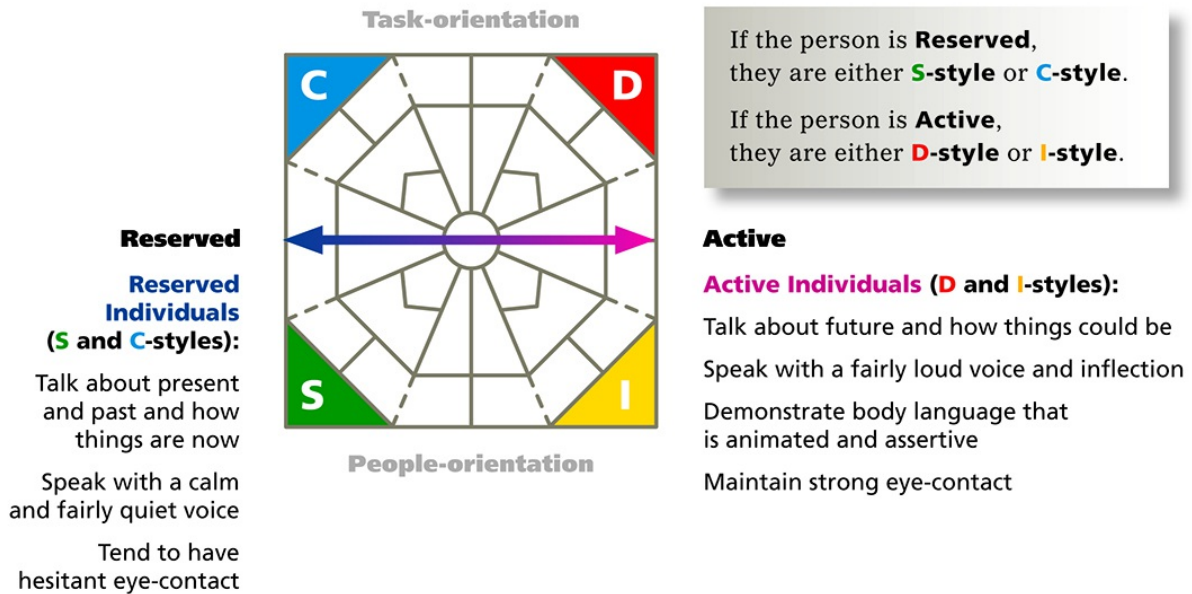
You will discover that observing behaviors will become second nature. Soon you will observe behaviors without thinking.



Step 2: Assess

Based on your observations, determine if the individual is more:

- Active
- Reserved



If the individual is Active, he/she is either D-style or I-style.

- Talk about future and how things could be
- Speak with a fairly loud voice and inflection
- Demonstrate body language that is animated and assertive
- Maintain strong eye-contact

If the individual is Reserved, he/she is either S-style or C-style.

- Talk about present and past and how things are now
- Speak with a calm and fairly quiet voice
- Demonstrate body language that is limited
- Tend to have hesitant eye-contact

Next, determine if the individual is more:

- Task-oriented
- People-oriented

**Next, determine if the person is more:
Task-oriented or People-oriented**

Reserved People-oriented Individuals (S and I-styles):
Talk and ask about people
Focus more on people than tasks
Show emotion fairly easily

Task-oriented Individuals (C and D-styles):
Talk and ask about things
Focus more on tasks than people
Do not show a lot of emotion

Active

If the person is **Task-oriented**, they are either **D-style** or **C-style**.
If the person is **People-oriented**, they are either **I-style** or **S-style**.

If the individual is Task-oriented, he/she is either D-style or C-style.

- Talks and asks about things
- Focuses more on tasks than people
- Does not show a lot of emotion

If the individual is People-oriented, he/she is either I-style or S-style.

- Talks and asks about people
- Focuses more on people than tasks
- Shows emotion fairly easily

Step 3: Recognize

Now you have the information needed to identify the person's style by combining the Active-Reserved and Task-People Orientation.

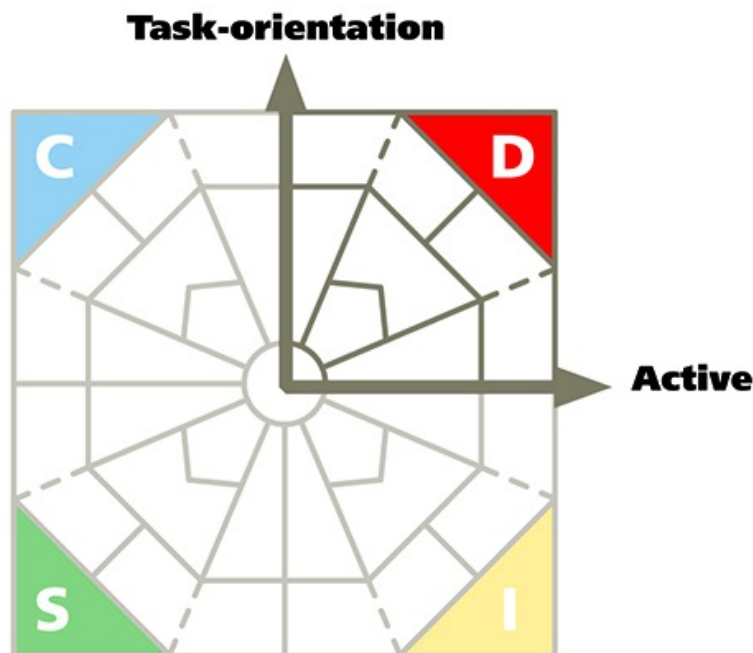
D-style = Active and Task-oriented

This is how to recognize D-styles.

Talks about: Goals, oneself, hard values (\$, revenue, profits) results, change.

How to identify D-styles:

- Is decisive
- Is assertive
- Very impatient
- May interrupt you
- Is direct, says what thinks
- "What's the bottom line?"
- Focuses on the big picture
- States own opinions as facts
- "How does this benefit ME?"
- Often appears to be in a hurry
- Makes decisions quickly, almost hastily
- May talk to many people at the same time
- May have difficulty understanding others' viewpoints/feelings



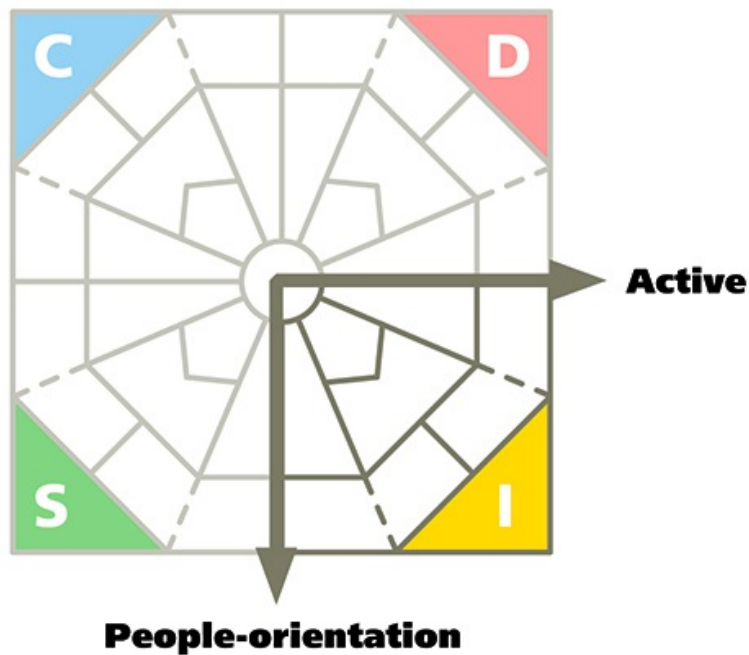
I-style = Active and People-oriented

This is how to recognize I-styles.

Talks about: People, team-spirit, good things, future, oneself

How to identify I-styles:

- Talks a lot
- Is animated
- Is open and friendly
- Appears unorganized
- Does not listen for long
- Stays away from hard facts
- Does not pay close attention
- Jumps from subject to subject
- Does not focus much on details



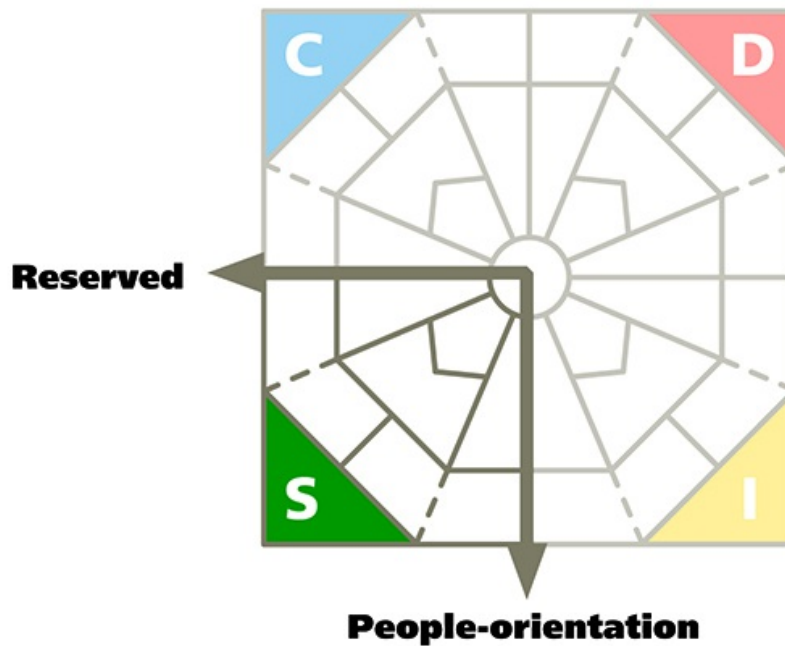
S-style = Reserved and People-oriented

This is how to recognize S-styles.

Talks about: Agreements, principles, past, proofs, one's team

How to identify S-styles:

- Is easy-going
- Appears calm
- Listens carefully
- Appears thoughtful
- Nods and goes along
- "Let me think about it."
- Likes own physical space
- Does not get easily excited
- Ponders alternatives, slow in making decisions
- Asks questions and inquires about the specifics
- Seems have strong opinions but does not express them vocally
- Completely new ideas/things seem to make him/her uncomfortable



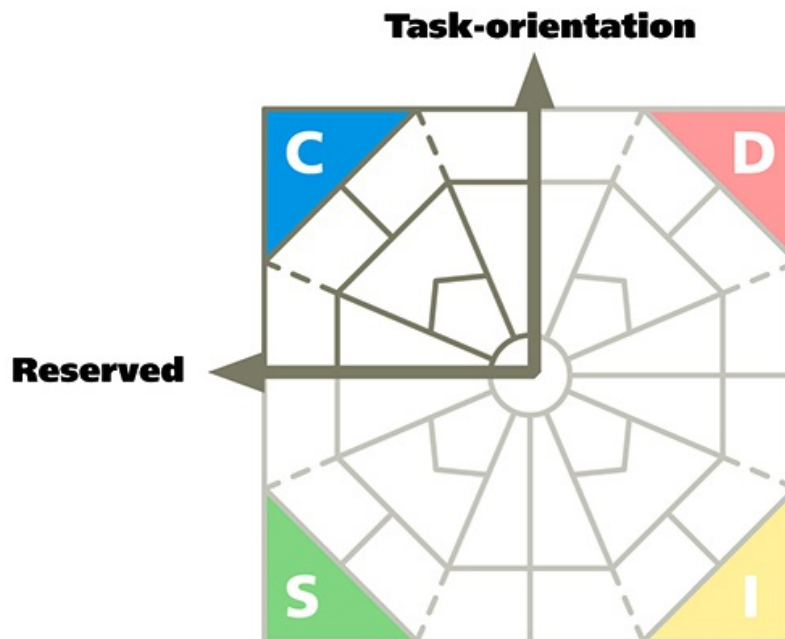
C-style = Reserved and Task-oriented

This is how to recognize C-styles.

Talks about: Facts, analyses, details, rules, instructions

How to identify C-styles:

- Is quiet
- Focuses on details
- Proceeds cautiously
- Asks many questions
- Appears reserved and somewhat timid
- Doesn't easily express disagreeing views
- May have done homework on your products/services
- Studies specifications and other information carefully
- Makes decision only after studying pertinent facts/issues
- May be very critical; criticism based on facts, not opinions



D-styles

"I never worry about action, but only inaction."

- *Winston Churchill*

The D-style is the most aggressive and assertive of the four styles. D-styles tend to be quite competitive and results-oriented. As a result, you may identify D-styles as being quite aggressive, blunt and even rude. Under pressure they can appear to have a lack of concern for others. They do not want to lose control. D-styles want to be in charge and have the power.

D-styles prefer to move fast, take risks and get things done now. They like change and challenges. D-styles may also often want to create change.

D-styles can also be impatient and overbearing. They are often not very good listeners and are prone to make snap decisions.

Motto: I did it my way.

Focus: Actively controls tasks and things.

Under pressure - Lack of concern. This refers to D-styles' tendency to overlook how their actions and behaviors affect others.

Fear - Loss of control. This refers to D-styles' desire to be in charge. They do not want to give up control.

Favorite question: What? (What is the bottom line? What is in it for me?)

Communication Style:

- Often to only one direction - he/she talks and expects others to listen
- Expresses own opinions as facts that need no further discussion
- May be blunt and challenges others
- Interrupts others often

Brian, when communicating with a D-style, remember to:

- Do not let the discussion leave them wanting more than you are able to provide
- Be concise
- Stick to the point - do not get side-tracked
- Be very systematic and concise in what you say
- Justify your opinions to them
- Make firm and clear statements
- Be direct in your statements

Brian, what not to do with D-style:

- Let them play with ideas but do not allow them to get side-tracked
- Be careful not to talk about something they are not interested in
- Try to avoid the relationship becoming anything but business-based
- Do not talk for long without checking if they want more information
- Be careful that the conversation does not get side-tracked
- Do not hesitate in whatever you say or do
- Do not be too modest

Notes:

I-Styles

"Why fit in when you were born to stand out?"

- Dr. Seuss

I-styles are outgoing, social, and talkative, and like to be the center of attention. They like to interact with others and meet new people. They do not like to focus on details, or spend a lot of time by themselves. Others tend to perceive I-styles as very friendly, enthusiastic and animated.

I-styles are the influencing and interactive individuals who shake up their environment by bringing others into alliance with one another. They know what they want, align everyone together to get it done, and want everyone to like them as they move forward. Social acceptance is very important for I-styles – they like to be liked.

I-styles are talkative, sociable, optimistic and lively. They are people-oriented, spontaneous, energetic and enthusiastic. I-styles tend to be positive and good at influencing others.

I-styles can also be inattentive to details, overly talkative and emotional. They may over-promise because they are so optimistic and eager to be popular. Others may perceive I-styles as somewhat careless, impulsive and lacking follow-up.

Motto: "I am a nice person. Everyone should like me."

Focus: Actively involved with people and emotions.

Under pressure - Disorganized. I-styles have a tendency to focus so much on people that they may overlook details and tasks.

Fear - Social rejection. I-styles have a strong desire to be liked by others.

Favorite question: Who? (Who is going to be at the meeting? Who else is using this?)

Communication Style:

- Selling and inspiring
- Talks a lot, but not about details
- Avoids unpleasant subjects
- Good at providing positive, constructive feedback
- Not always direct

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Brian, when communicating with an I-style, remember to:

- Do not forget your final goal with the client
- Make intermediate summaries and lead the communication
- Set an agenda
- Commit the prospect to decisions you make together
- Get to the point but do not talk for long
- Talk briefly and clearly, offering them more opportunities to talk
- Be concise and emphasize the benefits you offer

Brian, what not to do with an I-style:

- Do not let them drift to another topic
- Do not believe everything they say - they are good at influencing other people
- Do not forget that having fun does not always equal to getting their business
- Be careful not to talk too much nor focus too much on details
- Do not let them to move away from the topic that you want to talk about
- Do not talk when they would like to talk
- Do not assume a passive role

Notes:

S-Styles

“Nothing in this world can take the place of persistence. Talent will not; nothing is more common than unsuccessful people with talent. Genius will not; unrewarded genius is almost a proverb.”

- Calvin Coolidge

S-styles are steady, calm and laid back. While they do like interaction with other people, they are more reserved and less animated than I-styles. S-styles prefer things to remain the same because changes and surprises threaten their sense of security. Family and friends tend to be very important to S-styles. They often defend their own group or team almost emotionally; fairness and justice are very important to S-styles.

S-styles are reliable and stable with an emphasis on cooperating with whoever is in charge to carry out the tasks. They say: “Tell me what, when and how you want it done and I’ll be glad to do it.” If you do not give me enough details, I won’t get started because you might blame me if it gets done wrong.”

Since S-styles prefer stability and security, they tend to resist change and need support with it. They want to know how the change will affect their lives. S-styles are also prone to be hesitant in their actions and decision-making. This is primarily caused by their desire to consider others and for everyone to get along.

Motto: If it’s not broken, let’s not fix it.

Focus: Involved with familiar people.

Under pressure - Too willing. S-styles’ have a tendency to be accommodating and polite. Often they say “yes” too easily.

Fear - Loss of stability. S-styles have a desire to have a stable and secure environment. Change can be challenging for S-styles.

Favorite Question: How? (How are we going to do this? How does this impact us?)

Communication Style:

- Often only to one direction, he/she listens
- Answers when asked
- Talks calmly
- Creates trust
- Talks about topics he/she masters
- Better in one-to-one situations
- Good instructor

Brian, when communicating with an S-style, remember to:

- Create a clear beginning and end to every topic
- Establish and agree on a goal for the meeting
- Ask definitive questions that allow you to move forward
- Agree with them when it is time to take the next step
- Cover all issues step-by-step
- Always agree on the next two or three steps before moving forward
- Provide them with all of the facts they need

Brian, what not to do with an S-style:

- Do not leave any open ends
- Do not assume they will take independent action after you are gone
- Do not hesitate to state your opinion
- Avoid being too detailed (keeping in mind you cannot hide anything from them)
- Do not wait until they make a decision
- Do not allow them to make a decision before you know it is the one you want
- Do not feel that you have to hide something or cannot tell everything

Notes:

C-Styles

"I have no special talent. I am only passionately curious."

- **Albert Einstein**

C-styles are the most analytical of the four behavioral styles. C-styles can be very detail-oriented, focusing on facts, information and proofs. They are comfortable working alone and are the most reserved of the four styles. C-styles are logical and methodical in their approach.

C-styles are cautious and compliant to their own high standards. Their emphasis is to work with the existing circumstances to ensure the quality of the product or service. C-styles make sure that everything works the way it should.

C-styles are sometimes too critical of others. They expect everyone to follow their standards. Their attention to detail and correctness can be perceived as nit-picky by others. C-styles' desire to do things correctly can also slow down their decision-making. They can over-analyze issues and need a lot of information.

Motto: "If we do not have time to do it right, do we have time to do it over again?" As a result, C-styles are good in ensuring quality control.

Focus: Analyzes tasks and things.

Under pressure - Overly critical. C-styles have a tendency to be so focused on the details that they often find mistakes and errors. The other styles may find C-styles too critical.

Fear - Criticism of work. C-styles want to be correct and to produce high-quality work. They do not want to make mistakes.

Favorite question: Why? (Why does it work this way? Why should we do it?)

Communication Style:

- Better in written communication
- Doesn't express disagreeing views
- Includes a lot of facts and details
- May miss the big picture
- Doesn't talk about opinions or abstract matters
- Extremely diplomatic

Brian Taylor

Organization: **FinxS** Date: **11.21.2013**

Brian, when communicating with a C-style, remember to:

- Do not get too personal - concentrate on the actual topics
- Remember to summarize after each topic
- Ensure that the discussion leads to something
- Talk more about the product/service than about them
- When you go into details, remember to be logical and cover one issue at a time
- Always remain a step ahead and ready for what they are going to ask for next
- Focus on the business as much as possible

Brian, what not to do with a C-style:

- Do not include too many aspects in one discussion or decision you expect them to make
- Do not allow them to form an opinion - try to keep everything based on facts only
- Avoid falling into long discussions with them
- Do not forget to provide them with means to calculate what the additional value your product offers them
- Do not allow them to get side-tracked - keep things as clear as possible
- Do not bore them by explaining them what they consider basic knowledge
- Do not be too friendly before they allow you to be

Notes:

Personal Action Plan: Your Next Steps

Experience has shown that by creating a concise, simple and specific action plan is the best way to improve performance. To do so, create your "Top 3" lists to help you become more successful.

My Top 3 Start and Stop List:

Based on what you have learned, discovered and realized through this report, list three important items you will **START** doing:

1 _____

2 _____

3 _____

Based on what you have learned, discovered and realized through this report, list three important items you will **STOP** doing:

1 _____

2 _____

3 _____

