



*DiSC[®]
Customer Service
Action Planner*



**Increasing
Effectiveness
in Customer
Service**



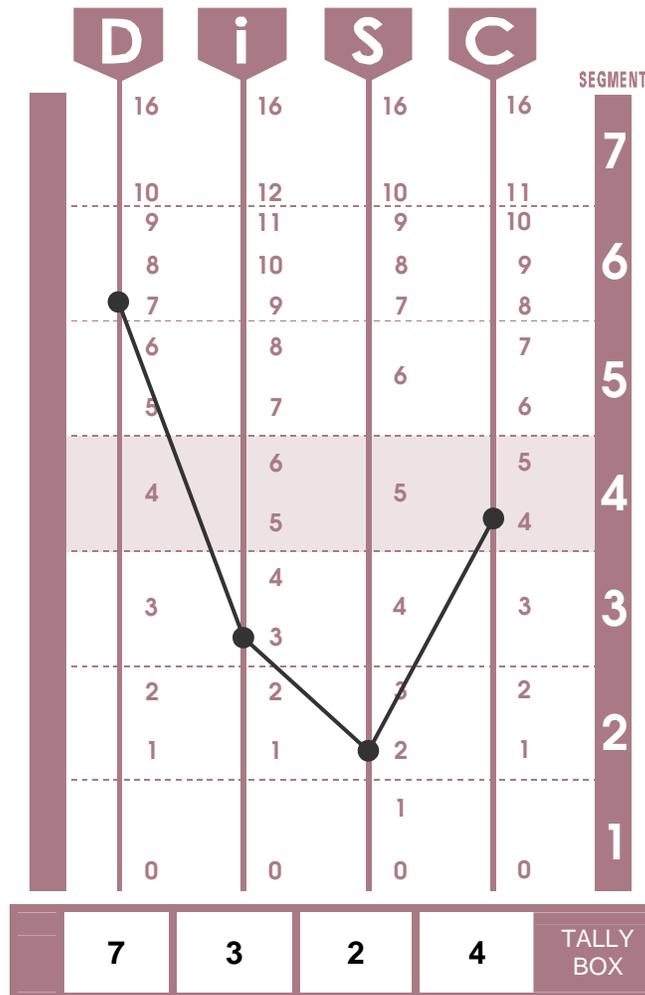
Respondent Name
Wednesday, June 08, 2005

This report is provided by:

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John's DiSC® Profile

Below is the DiSC® Graph that shows John's behavioral profile as you described him in your situation.



| PROFILE DETAILS | |
|------------------------------------|---|
| First Name: | John |
| Last Name: | Ryan |
| Gender: | Male |
| Customer Service Situation: | Exploring client needs and expectations |

DiSC® Styles of Behavior

The chart gives you insight into the goals and fears of each DiSC® style of behavior. John's highest DiSC style is shown in the shaded box so you can better understand what motivates him.

The Intensity boxes for each DiSC style match John's profile graph plotting points. To refine your understanding of John, circle the words that you feel best describe him.

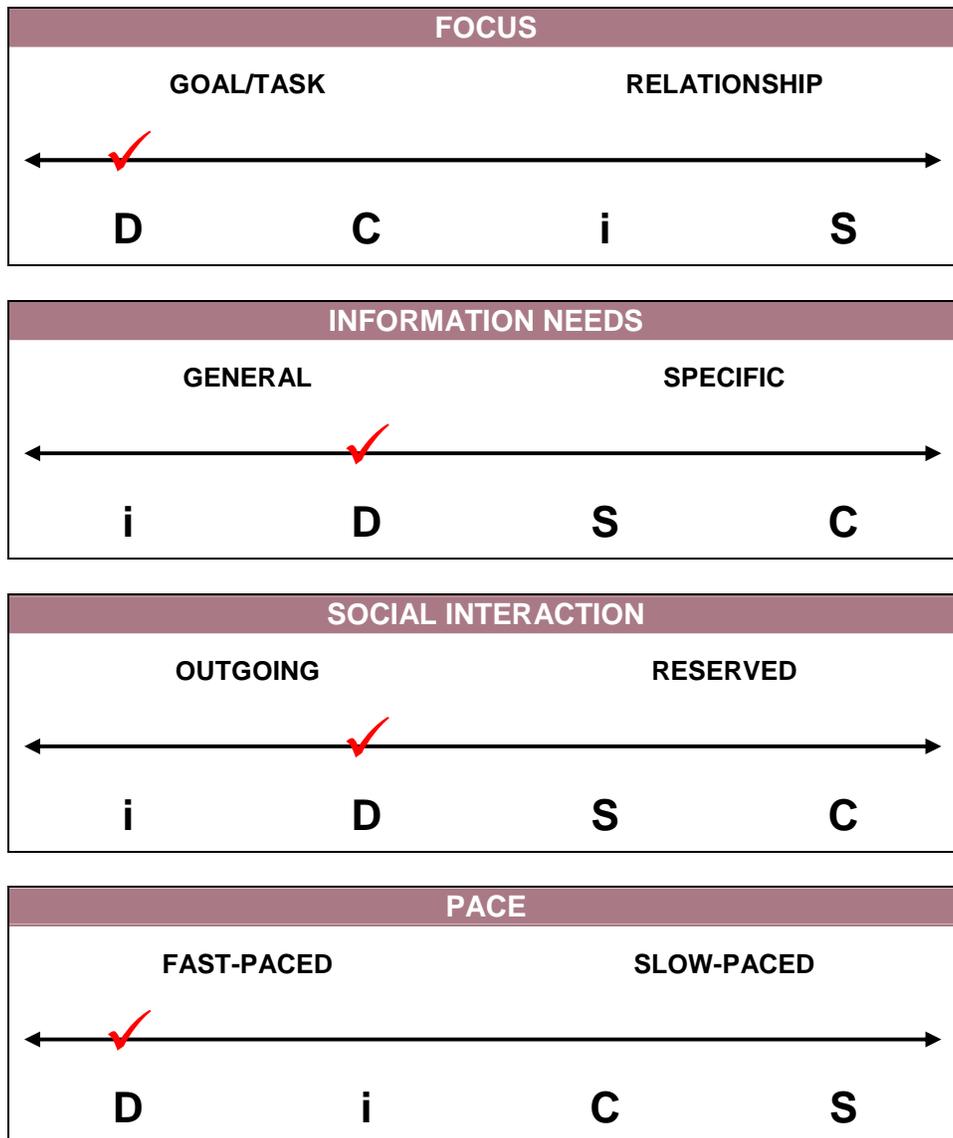
| DiSC Style | His GOAL Drive | His FEAR Drive | INTENSITY | | |
|------------|---------------------------------|---|--|---|--|
| | | | High (Segments 5, 6 and 7) | Moderate (Segment 4) | Low (Segments 1, 2 and 3) |
| D | Results; control | Losing control of environment; being taken advantage of | Direct Forceful Decisive | Competitive Self-reliant Unassuming | Cautious Mild Modest |
| i | People involvement; recognition | Rejection; loss of approval | Enthusiastic Self-promoting Sociable | Poised Confident Reflective | Controlled Pessimistic Withdrawn |
| S | Security; stability | Sudden change; losing security | Patient Predictable Cooperative | Nondemonstrative Deliberate Mobile | Critical Restless Spontaneous |
| C | Accuracy; order | Criticism of performance; lack of standards | Accurate Conscientious Restrained | Analytical Evasive Persistent | Arbitrary Defiant Tactless |

Adaptability to Different Styles

The four pure behavioral styles exist on comparative continuums with each other. The four behavioral tendencies scales illustrate the degree of adaptation that is required for effective communication as they match your response to John's behavioral style.

John's strongest behavioral style (i.e., highest plotting point) is marked with the ✓ symbol.

If you have completed your own **DiSC® Profile**, plot your highest DiSC style on each of the four scales with an "X." The degree of difference indicates how much you will need to adapt to communicate with John in his comfort zone.



Suggestions for Interaction

John's strongest behavioral style (i.e., highest plotting point) is shown in the shaded column. When developing your **Action Plan** (page 6) for him, review the suggestions provided below for each approach in the customer service process.

| | D STRONGEST | i | S | C |
|--|---|---|--|---|
| ▼ Process | Dominance | Influence | Steadiness | Conscientiousness |
| PLANNING Develop an overall plan focusing on his behavioral style as it relates to your service. | Develop a strategy concentrating on his fear of being taken advantage of and his goal of personal control. | Develop a people-oriented approach. Emphasize how your product or service increases his influence and approval from others. | Research how your service will provide him support. Emphasize how this will simplify and stabilize his existing relationships and practices. | Be prepared to address your product or service performance record. Assure accuracy and appeal to his quality concerns. |
| INITIATING Use the amount and type of interaction needed to put him at ease. | Limit socializing. Get to the point. Respond to his task-related need. | Be casual and friendly. Relate to his feelings and aspirations. | Be informal and low pressure, but methodical, in your interaction. | Get down to business swiftly but tactfully. Respect his privacy. Let him be the expert. |
| INTERACTING Clarify how you can help satisfy his expectations. | Be businesslike. Ask “what” questions that focus on his concern for results. | Be enthusiastic. Ask “who” questions that reveal his motivations. | Be sincere. Ask “how” questions that show concern for both tasks and relationships. | Be businesslike. Ask questions that let him express knowledge, strategies, and apprehensions. Respond to “why” questions. |
| RESPONDING TO CONCERNS Address his concerns based on style needs. | Accept his bluntness. Show your desire to help him achieve added results. | Respond with empathy to his feelings or doubts. Use feeling statements and give testimonials of others' success. | Accept and share his feelings. Offer ongoing support. Probe for real concerns, if necessary. | Seek and respond to his most pressing questions. Reinforce concern for logic by providing reassuring evidence. |
| GAINING SHARED COMMITMENT Keeping style in mind, influence the customer relationship to gain appropriate commitment. | Highlight his key options. Acknowledge the decision is his to make. | Use an upbeat approach that inspires him to action. Ask for the action that lets you meet his business needs. | Detail how he can practice action. Sincerely support his decisions. Seek a firm commitment without pushing. | Offer options and clarify his priorities in making a product or service decision. Support his demand for logical actions. |
| SERVICE FOLLOW-THROUGH Strengthen your win-win relationship by satisfying his expectations and concerns. | He tends to expect efficiency and agreed-upon delivery. Provide reminders of your proven track record. Strengthen your position by achieving desired results. | He may expect your follow-up to spare him personal effort or complications. Meet his need to “look good.” Be responsive, informal, and open in your dealings. | He tends to expect personal attention, availability, and assistance. Provide repeat, predictable follow-up to assure the stability he desires. | He may expect specific assurances for reliability and quality standards. Summarize your business relationship verbally and in writing, and review periodically. |

Management Action Plan

PLANNING: Given John's DiSC® style of behavior, what are some things you must make sure you do and avoid doing?

INITIATING: How much and what kind of interaction is most appropriate for John?

INTERACTING: What questions will you ask to confirm his personal and organizational issues?

RESPONDING TO CONCERNS: What are some likely concerns (i.e., objections, fears) he may have, and how can you reduce them?

GAINING SHARED COMMITMENT: What ongoing approach is likely to be most effective for gaining John's commitment?

SERVICE FOLLOW-THROUGH: What follow-through expectations is John likely to have, and how can you effectively respond?

What did you learn from your meeting? How can you improve your next contact with John?

PLANNING: Was John's DiSC[®] style of behavior the same as it was the first time you filled out the Customer Profile? If not, what have you now concluded is his actual style of behavior?

INITIATING: How was the comfort level between you? What could you change next time that could increase this comfort level for each of you?

INTERACTING: What customer needs were discovered? What questions might you ask during your next meeting?

RESPONDING TO CONCERNS: What were John's main concerns? What responses could you make next time that might satisfy these concerns?

GAINING SHARED COMMITMENT: Did you gain the type of shared commitment you sought with him? If yes, what were the results? What strategy will you use to help further build his commitment next time?

SERVICE FOLLOW-THROUGH: How does John need to be serviced in your follow-up business actions? What achieved, productive, business results can you build on to expand your business with him?
