



DAG KNUDSEN

WINNING BY DESIGN
NOT BY CHANCE



FACILITATOR'S GUIDE

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FACILITATOR'S GUIDE

for effective in-house training

using
Dag Knudsen's Business Development Approach:
"Winning by Design, Not by Chance"

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1. Presentation titles, disc contents and list of inserts

The presentations are based on and organized around Dag Knudsen's business development formula:

Proactive Positioning + Selective Pursuits + Persuasive Communication

leads to

“Winning by Design, Not by Chance”

Each part of the formula is explained with one or more presentations.

Proactive Positioning represents a sequence of topics addressing the structure and process of a business development program. The program is based on the philosophy that face-to-face contact with clients is a productive approach to winning business. How to develop effective sales action plans is a key focus.

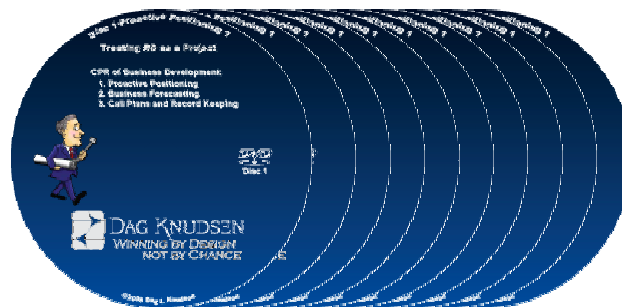
Selective Pursuits is a short video presenting a set of Go, No-Go decision criteria which my clients consider profound. This video presents solutions to the problems inherent in the commonly used Go, No-Go decision processes.

Persuasive Communications focuses on how to communicate your value to your clients. The videos first establish the communication challenges inherent in technical and client communications. Solutions are presented in the form of effective presentations and proposals. These programs are the same as Dag's two-day seminar. Case studies provide examples of application of the methods taught.

The videos are contained on ten DVDs for ease of personal and group use. The information is presented in a format that serves as a presentation model.

The CD contains Cue-Notes for each of the presentations and additional support materials.

With this package you have a complete program on effective business development for professional firms in engineering, architecture and construction. Adapt it to your particular situation and the result should be an increased success rate in the market place.



PROACTIVE POSITIONING

DVD #	Titles	Lecture time*
1	Proactive Positioning Requires Treating Business Development as a Project CPR of business Development 1. Proactive Positioning 2. Business Forecasting 3. Call Plans and Record Keeping	13 min 57 min total 25 min 16 min 16 min
2	Client Account Analysis 1. Decision Making Styles 2. The Account Analysis 3. Sales Action Plans 4. Record Keeping and Examples	1.7 hour total 35 min 40 min 16 min 12 min
3	Making Client Contacts: The Value Call Interviewing Clients.	46 min total 33 min 13 min

SELECTIVE PURSUITS

DVD #	Titles	Lecture time*
3	GO, NO-GO Criteria	11 min

* Workshop activities or discussion times are in addition to the lecture times listed.

PERSUASIVE COMMUNICATIONS

DVD #	Titles	Lecture time*
3	Communication Challenges	43 min
4	Winning Interview Presentations	5.4 hours total
	Introduction and Overview	17 min
	Ch. 1 Visual Aids	1.5 hour
	a. Effective Visual Aids	
	b. Cue-Note Type “Bullet-Charts” — a No-No	
	c. Hints For Best Results	
5	Ch. 2 Creating Favorable Audience Response	1 hour
	Ch. 3 Creating Audience Centered Presentations	51 min
6	Ch. 4 Organizing Presentations	44 min
	Ch. 5 Storyboard Techniques	22 min
	Ch. 6 Winning Proposals	33 min
	Conclusion	6 min
7	You’re Shortlisted! You’re Qualified! But Your Price is High! Now What?	48 min
8	Introduction to Case Studies	4 min
	Case Study 1:	1.25 hours total
	The Importance of Persuasion in Engineering Communication	
	1. The Challenger Space Shuttle Accident	35 min
	2. An Approach to the Effective Presentation	39 min
9	Case Study 2:	1.3 hour total
	Qualification Based Selection of Design Professionals	
	Creating the Presentation	
	The QBS Presentation:	
	1. QBS Presentation Introduction and Overview	
	2. The Negotiation Process	
	3. QBS Enhances Project Economy	
	4. QBS Supporters	
	QBS and Business Development	
10	Case Study 3:	1.2 hours total
	Voting Methods, an example of technical presentation design	
	Introduction	
	1. Improving Election Quality	
	2. Single-Member District Voting Solutions	
	3. Multi-member District Voting Solution	
	How the Technical Presentation Design Evolved	

* Workshop activities or discussion times are in addition to the lecture times listed.

ADDITIONAL MATERIALS INCLUDED

	Titles	
On CD	<p>Cue Notes for each of the presentations</p> <p>File with QBS presentation in pdf format for your use for presentations to staff and clients</p> <p>Instructions for the QBS presentation</p> <p>Order form for DiSC® materials, PAL-frames and videos</p> <p>Suggested Training Formats - Facilitator's Guide</p> <p>Additional instructional material: QBS background material <i>Hear!Look!Talk!</i> This article is a synthesis of the Theme-Modular presentation and proposal methods—an article by Dag Knudsen</p>	
Inserts	<p>DiSC instruments: 5 each <i>DiSC Preview</i> (C-203) 5 each <i>DiSC Sales Action Planner</i> (C-172)</p> <p>5 each PAL frames</p>	
Purchase	<p>Additional copies of this material can be purchased from Dag Knudsen, Inc. See order form on the CD or on the website (http://www.dagknudsen.com) for details.</p> <p style="margin-top: 200px;"><i>“DiSC” is a registered trademark of Inscape Publishing Inc.</i></p>	

2. Suggested training approaches

The presentations are organized around the formula: Proactive Positioning + Selective Pursuits + Persuasive Communication = Winning by Design, not by Chance.

However, introducing the material in your firm does not have to follow that sequence.

My recommendation is that you start with the Persuasive Communication programs as outlined on page 6. Once your staff has been exposed to this approach, the other materials will make a whole lot more sense because the principles taught form the foundation for my complete system of business development.

On the basis that you will hold group training sessions, this program can be carried out during a combination of brown-bag luncheon meetings, two hour sessions, and half day programs. Obviously, individuals can watch the presentations on their own time.

For brown-bag luncheons:

Play a segment or a topic that fits the time frame.

Facilitate a discussion about how the ideas can be implemented in your firm.

For two-hour sessions:

Play a segment or a topic that fits the time frame.

Use 15 to 30 minutes of the time discussing applications to your company.

For half-day sessions:

Two sets of lectures lend themselves especially well to half-day sessions:

1. The Client Account Analysis program fits this time frame well when you combine the lectures with workshop activities. Apply the principles taught to a current business pursuit by following the instructions in the handout (also reproduced on page 14 in this document). Teams of three should be able to complete the analysis and draft a sales action plan in one to 1.5 hours.
2. The Winning Presentations program can be organized into half day programs, or even longer.

Dag does not only talk *about* his method. You will observe his method in action. He uses his method of design and delivery of winning presentation in each lecture.

Next, each video is listed with longer titles and suggestions on the format to be used.

PERSUASIVE COMMUNICATION TOPICS (outline on page 6)

Communication Challenges:

Accurate Communication is Subject to Significant Barriers (43 min)

This video lends itself to a brown-bag luncheon followed by a discussion.

Ask participants to share experiences which fit into one or more of the communication challenges described.

Winning Interview Presentations and Proposals (5 hours 23 minutes total)

This is the complete seminar entitled *Design and Delivery of Winning Interview Presentations* that Dag normally conducts over a two-day period and which includes about 6.5 hours of exercises and workshop activities. You can focus on just playing the tapes or expand the content by conducting workshop activities. Topic suggestions are provided on page 13. These chapters should be presented in the order listed.

Introduction and Overview (17 min)

The introduction establishes the purpose for the program and sets the stage for what is coming.

Ch. 1 Effective Visual Aids (1 hr 30 min)

a. Effective Visual Aids

b. Cue-Note Type “Bullet-Charts”—a No-No

c. Hints For Best Results

This chapter includes two exercises. Total time will therefore take a little longer than the playing time. This topic lends itself to a two hour time slot by playing the introduction and Chapter 1.

Ch. 2 Creating Favorable Audience Response (60 min)

This chapter can obviously be presented in an extended brown-bag luncheon program. However, by extending it to a two-hour program you can include some workshop activities and allow participants to practice application of the audience analysis tool. Topic suggestions are on page 13. These topics can then be used in the next chapter for the workshop segment on how to design winning presentations.

Ch. 3 Creating Audience Centered Presentations (51 min)

This chapter walks the viewer through the steps of designing the presentation. Participants can view the complete tape and then do a workshop activity wherein they design a presentation in accordance with the instructions, OR they can design a presentation as each step is presented.

Ch. 4 Organizing Presentations for Various Situations (44 min)

This is a lecture that describes the modularity of the process. It lends itself well to a brown-bag session.

Ch. 5 Story Board Techniques Represent Excellent Management Tools (22 min)

The storyboard techniques are effective tools for managing both time and the message. After viewing this chapter, the participants can storyboard their own workshop presentations. They would go through the checking process and give a proto-presentation from the storyboard. This could take up to two hours total.

Ch. 6 Winning Proposals (33 min)

The proposal design process is identical to the presentation design process. This lecture, which lends itself to a brown-bag session, shows how the message design translates to proposal writing. Follow the lecture with discussion on how to implement the ideas presented—and when.

Conclusion (6 min)

This brief summary can be played together with Chapter 6.

You're Shortlisted! You're Qualified! But Your Price is High! Now What? (48 min)

This lecture lends itself to a brown-bag session. Four strategies for communicating the value of your price (fee) is presented. Afterwards, ask the participants to share experiences where one or more of the suggested approaches has been used, or can be used. This lecture can be viewed at any time.

Case Studies

Each of the three following case studies contains a presentation and an explanation of how the presentation was developed. Each Case Study lends itself to a 1-1/2 to 2-hour session on the basis that there will be a discussion of the materials. The Challenger case study can be played at any time because it will also prepare participants for the winning presentation program. The QBS example shows detailed steps in message design and contains a presentation that you can present to your clients. The CD contains the QBS presentation in PDF format. Using Adobe Acrobat software, you can also edit this presentation. Please be sure that presenters use the delivery method that I use. This assures best effectivity. The presentation on Voting Methods may seem out of place. It is included because it represents an example of how to use the presentation design method for technical presentations such as conference talks.

Introduction to Case Studies (4 min)

Case Study No. 1:

The Importance of Persuasion in Engineering Communication. Learning From the Space Shuttle Challenger Accident. (1 hr, 14 min total)

1. *Shuttle Hearings Did Show Common Communication Problems Prevailed (35 min).*
This lecture describes serious communication problems that contributed to the accident.
2. *Scientific Method Helps Create Effective Technical Presentations (39 min).*
This lecture shows how the presentation method described in the Winning Presentations sequence of lectures could have been used to potentially prevent the accident.

Case Study No. 2:

Qualification Based Selection (QBS), an example of communicating the value of a process. (1 hr, 17 min)

Creating the Presentation

This lecture describes how the presentation methods are used to develop the presentation and serves as another design example using the steps in the process.

The presentation itself:

- Qualification Based Selection Process Provides Complete Peace of Mind
- a. *Negotiation Process Makes Buyers Quite Comfortable With Price*

b. System Optimization Principles Lead to Greatly Enhanced Economy

c. Broad-Based Support of the QBS Process Eliminates Criticism

The above represent the three parts of the argument for QBS and demonstrates how the longer presentation is organized.

Proactive Application of QBS Process Leads to Excellent Positioning

This lecture describes how the QBS process can be made an integral part of the proactive business development process.

Case Study No. 3:

Voting methods: An example of how to create a technical presentation. (1 hr, 11 min.)

The Presentation is given first in order to provide the needed background to understand how it was created:

Enhanced Voting Methods Improve Election Quality

1. US' Winner-Take-All Plurality Election Method

Pales in Comparison to Proportional Representation Systems

2. Instant Runoff Voting (IRV)

Improves Election Quality for Single Member Districts

3. Preference Voting and Multi-Member Districts

Improves Election Quality—Even More

The above demonstrates how a longer presentation can be organized. This example also serves as an example for technical presentations as opposed to business development presentations. The goal here is to educate the audience on a “technical topic.”

Applying the 5W Format Filter To Determine Presentation Content

This lecture describes how this presentation was designed—how it evolved for a specific audience—again using the principles in the Winning Presentations lectures.

PROACTIVE POSITIONING TOPICS (outline on page 5)

Proactive Positioning In the Client's Mind Requires Treating Business Development as a Project (13 min)

Consider presenting this and the next video in one session.

CPR of business Development (57 minutes total)

1. Proactive Positioning Represents the CPR of Business Development (25 min)

2. Simple Tracking System Provides Basis for Business Forecasting (16 min)

3. Call Plans and Record Keeping Keeps you on Track for High Wins (16 min)

After viewing the Proactive Positioning and CPR of Business Development programs, a discussion session is beneficial to ascertain what you are doing now, what you may want to change, and any research you may want to conduct. The first research project may consist of looking at the last 5 years of business development activities and tabulate wins and losses on the basis of where in the process you started the business development efforts. You might find this quite revealing. This program lends itself to a two-hour time-slot.

Client Account Analysis (CAA) (1 hr, 40 min total):

- 1. Behavior Types and Typing Behavior, An Aid to Understanding How People Make Decisions (35 min)***
- 2. Client Account Analysis: Situational Mapping of Target Accounts Leads to Focused Sales Action Plans (35 min)***
- 3. One Page Sales Action Plan Provides Focused Effort in Positioning (8 min)***
- 4. Record Keeping Completes the Process (7 min)***

The Client Account Analysis can be conducted as one or two programs:

1. As one program, you would show the videos and then apply the principles to an actual current pursuit. This lends itself to a four to six hour program. I tend to create groups of three people. Each group analyzes one client. Place charts on the wall as identified in the video and issue a six-pack of color markers to each team. The steps in the Client Account Analysis can be found in the Cue-Notes located on the CD and are repeated on page 14 of this guide.
2. As two programs, you would show topic number 1—Behavior Types— at the first meeting and have participants go through the DiSC instruments. This might take up to 1-1/2 hour. This approach requires that participants have their own copy of the DiSC profile and the DiSC Sales Action Planner. Additional copies are available for purchase from Dag Knudsen, Inc. See order form on the CD or on the web-site. Workshop materials are included in this guide on pages 16, 17, and 18. The second meeting can then consist of topics numbers 2, 3 and 4. Practice makes perfect and this program offers an excellent opportunity to apply the principles to current active pursuits. You could therefore apply the principles to actual business pursuits by extending the schedule to three or four hours.

Making Client Contacts:

- 1. The Value Call Leads to Being Invited Back (33 min)***
- 2. The Funnel Approach: A Practical Approach To Interviewing Clients (13 min)***

These two videos provide guidance in how to approach your clients. In order to practice the techniques, I have included a basic format for a marketing research project where your staff goes out and interviews your clients (current, past and future). Look for the model that you can implement. This model serves as excellent on-the-job training and demonstration. It is found in the Cue-Notes which are provided on the CD.

SELECTIVE PURSUITS

Strong GO, NO-GO Criteria Enables Productive Pursuits (11 min)

This short video presents a solution to the problems inherent in the commonly used go, no-go decision processes. In the common process you identify a set of criteria against which you evaluate each business opportunity. Your decision is GO if your score exceeds, for example, 60%. The problem is that you can justify any pursuit with this approach, often resulting in low win-rates.

Suggestion: Show the video and then hold discussions about how to implement my method of business development decision-making in your organization.

Viewing and discussing this video will make most sense after you have viewed the Proactive Positioning videos.

3. Suggested topics for the presentation design workshop

Here are some simple workshop exercises that can be used to practice the 5WFormatFilter and form the basis for the presentation design workshop. You can then create your own examples for additional exercises and/or apply the principles to actual pursuits.

WHAT	WHO		WRESPONSE
	Speaks	Listens	
1. Pyramid design	Designer	King & Council	Select
2. Bureau of Standards	Archimedes	King & Council	Establish
3. Downtown Garbage Incinerator	Consultant	Public Hearing	Approve
4. Automatic Bike Transmission	SRI PM	Prez. of Schwinn	Fund
5. Steam Boat	Fulton	Investors	Finance
6. Refrigerators	Marketing Mgr.	Elders	Mandate

Let participants in each group of three select a topic for their group and develop a thesis by applying the audience analysis tool (the 5WFormatFilter). Then develop a presentation following the process outlined in chapter 3 of the Winning Presentations video.

Each example in the above list represents a different presentation situation. The purpose is for the participants to place themselves in the shoes of the particular audience and develop an appropriate persuasive message for that audience. Likewise, effective interview presentations are developed from the perspective of the particular audience you are addressing.

4. The Steps in the Client Account Analysis Process

The whole process should take 45 minutes or less unless the project is huge and complex. The terminology will make sense once you have watched the video. Participants will apply the process by following the steps listed below.



A. Start with the organization chart

The facilitator documents what the person who knows the client explains about the people, the programs, the relationships, etc. Cover the entire organization. Identify other consultants, vendors, related organizations and organizations of people who left the client in recent past. "Grow" the chart as information surfaces.

1. Identify decision makers/buying roles:
 - Political Top Decision Makers
 - Project Top Decision Maker
 - Gate Keeper(s)
 - highlight members of the selection committee.
 - Project peer(s) and project users (those who will live with the outcome).
 - Blockers and helpers (Inside coach, Outside coach, Scouts, Ball Carrier(s) etc.)
2. Identify the decision style for each person you know by using the DiSC identifiers.
3. Rate each decision maker on a force field diagram: Rate their attitude towards your organization with an arrow pointing to the right and their attitude towards the competition with an arrow pointing towards the left.
4. Place check marks (✓✓✓) in each block to reflect the number of face-to-face contacts you have had. Color code as needed to show multiple people in contact with client.
5. Place a RED FLAG wherever you have a question, an un-known situation, and all problems that may hinder your win.
6. Develop action plans: Translate the red flags into objectives to be achieved. Select those objectives that represent high priority. Prepare an interim action plan for each priority objective: What to be accomplished, by whom, when. The last action established must be your next meeting to review achievements and go through a new account analysis.

B. Fill out a dossier on each person (ref. Cue Notes).

- Title, behavior style, buying role, rating (± 3), blocker or helper and type of decision maker.
- BIAS which is a function of education, past experience and position.
- PERCEPTIONS of the project, your firm, competition (justify your ± 3 rating).
- AGENDA which is a function of behavior, covert motivation (personal needs) and institutional needs
- Also identify their futures (their plans), hurts (what are problems affecting their performance)—ASK WHY: This tells you what it takes to win and helps pinpoint their concerns and priorities.
- Identify critical technical issues.
- Identify critical service issues.

5. Instructions for the best use of the QBS presentation

You are encouraged to use the QBS presentation (included on the CD) within your company to educate your own staff as well as your clients.

You can use the pdf file as any other presentation software:

1. Open the file in Acrobat or Acrobat Reader.
2. Click 'Control I' for PCs, or 'Command I' for Macintosh. This will open the file in full screen view. Now you can advance each slide, project it with a digital projector, use it over the internet or whatever media you care to use.

You can also print the pdf based QBS slides for flip chart presentations using your large format printer. I use charts that are 20" high by 30" wide.

To regain control of your desktop, just redo the keystrokes listed above.

3. For the delivery, mimic my presentation style as observed in the videos:
 - a. Read the heading first and put some feeling into it.
 - b. Then explain all graphic elements and read every call-out on the visual.
 - c. Then face the audience and discuss and build on what you just covered. Make the story applicable to local conditions by adding your own experience stories.

That is all there is to it.

If you wish to modify the presentation, I suggest you create your own visuals. Use whatever software with which you are comfortable. Convert the visuals to pdf and merge them into this presentation. You can also delete or reorganize the visuals as long as you have the Adobe Acrobat software.

My visuals are in the horizontal 2 x 3 format so I suggest you lay yours out the same way.

6. Behavior styles in decision making: Workshop Exercises

1. Included in the package are five short versions of the DiSC instruments. These, or the more extensive ones, are available for purchase from Dag Knudsen, Inc. The more extensive version is also available as a web-based instrument. Tell participants that the DiSC is not a test. It cannot be failed. It can be faked. So don't answer on the basis of what you think is appropriate for the setting. Answer on the basis of how you behave or feel.

The DiSC is based on original work done by Dr. Marston in the 1920s. Dr. Geier, a former professor at the University of Minnesota, have since updated the finding and refined the instrument. The DiSC and Myers Briggs are different instruments. The DiSC deals with observable behaviors. That is why many of the exercises deal with observations. The scientific background is solid.

2. In order to help participants relate to the DiSC typing, I use a few exercises. They are included on this and the next two pages. Below is a simple starter. Ask participants to "type" (identify) the DiSC behaviors. Page 17 can be copied and given to participants. Instruct the learners to first identify the Low and High tendencies and then the Medium Low and Medium High tendencies. Let dyads discuss and provide the answers. Page 18 can then be handed out later to let the participants score their own answers. A discussion can follow.
3. Additional and more comprehensive DiSC instruments, paper-based and on-line versions, are available for purchase. Contact:

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Contents from the exercises on this and the next page are derived from talks by the founder and originator of the DiSC Personal Profile instruments, Dr. John G. Geier, and others.

Here is a simple exercise to introduce participants to behavior typing. Identify the DiSC styles for the members in each group. Suggested answers are listed below.

Lion	_____
Porpoise	_____
Koala	_____
Fox	_____
Directs too much	_____
Talks too much	_____
Agrees too much	_____
Questions too much	_____
Rides the bottom line	_____
Sells the bottom line	_____
Works for the bottom line	_____
Thinks about the bottom line	_____
Margaret Thatcher	_____
Ronald Reagan	_____
Gerald Ford	_____
Jimmy Carter	_____
Vince Lombardi	_____
Bill Cosby	_____
Edith Bunker	_____
Mr. Spock (Star Trek)	_____

Suggested answers:

Lion	D
Porpoise	i
Koala	S
Fox	C
Directs too much	D
Talks too much	i
Agrees too much	S
Questions too much	C
Rides the bottom line	D
Sells the bottom line	i
Works for the bottom line	S
Thinks about the bottom line	C
Margaret Thatcher	D
Ronald Reagan	i
Gerald Ford	S
Jimmy Carter	C
Vince Lombardi	D
Bill Cosby	i
Edith Bunker	S
Mr. Spock (Star Trek)	C

Two approaches that can be used to identify a client's style.

**1. Observe your clients in their environment.
Look for these common clues and their level of use:**

	Low	Medium low	Medium high	High	
• Desk Organization	i	D	S	C	Example
• Openness of Office	—	—	—	—	
• Willingness to Socialize	—	—	—	—	
• Interest in Results	—	—	—	—	
• Use of Logic	—	—	—	—	
• Disciplined use of Time	—	—	—	—	
• Ability to Listen	—	—	—	—	
• Decision-Making Speed	—	—	—	—	
• Willingness to take Risks	—	—	—	—	
• Interest in Data	—	—	—	—	

2. Checkmark descriptive words and total for each column.

For this exercise, look at each row, compare the words and find the errors.
There are eight wrong descriptors in this table. Find them.

Type “D” Dominant Director	Type “i” Influencer Expressive	Type “S” Steadiness Helper/Amiable	Type “C” Conscientiousness Analytical
<input type="checkbox"/> Directing	<input type="checkbox"/> Influencing	<input type="checkbox"/> Cautious	<input type="checkbox"/> Steady
<input type="checkbox"/> Self Certain	<input type="checkbox"/> Optimistic	<input type="checkbox"/> Deliberate	<input type="checkbox"/> Restrained
<input type="checkbox"/> Adventurous	<input type="checkbox"/> Enthusiastic	<input type="checkbox"/> Predictable	<input type="checkbox"/> Logical
<input type="checkbox"/> Decisive	<input type="checkbox"/> Open	<input type="checkbox"/> Patient	<input type="checkbox"/> Analytical
<input type="checkbox"/> Daring	<input type="checkbox"/> Stabilizing	<input type="checkbox"/> Impulsive	<input type="checkbox"/> Precise
<input type="checkbox"/> Protective	<input type="checkbox"/> Emotional	<input type="checkbox"/> Restless	<input type="checkbox"/> Doubting
<input type="checkbox"/> Competitive	<input type="checkbox"/> Persuading	<input type="checkbox"/> Accommodating	<input type="checkbox"/> Reserved
<input type="checkbox"/> Assertive	<input type="checkbox"/> Talkative	<input type="checkbox"/> Modest	<input type="checkbox"/> Tactful
<input type="checkbox"/> Easy going	<input type="checkbox"/> Charming	<input type="checkbox"/> Experimenting	<input type="checkbox"/> Consistent
<input type="checkbox"/> Forceful	<input type="checkbox"/> Sensitive	<input type="checkbox"/> Sincere	<input type="checkbox"/> Perfectionist
<input type="checkbox"/> Direct	<input type="checkbox"/> Outgoing	<input type="checkbox"/> Emphatic	<input type="checkbox"/> Reflective

Identify a prospect or client style through observation.

Common clues and their level of use:

	Low	Medium low	Medium high	High
• Desk Organization	i	D	S	C
• Openness of Office	C	D	S	i
• Willingness to Socialize	C	D	S	i
• Interest in Results	i	C	S	D
• Use of Logic	i	D	S	C
• Disciplined use of Time	i	S	D	C
• Ability to Listen	D	i	C	S
• Decision -Making Speed	C	S	i	D
• Willingness to take Risks	S	C	i	D
• Interest in Data	i	D	C	S

Checkmark descriptive adjectives and total for each column. This is another way to ascertain a client’s behavior/decision profile. (This is the correct list).

Type “D” Dominant Director	Type “I” Influencer Expressive	Type “S” Steadiness Helper/Amiable	Type “C” Conscientiousness Analytical
___ Directing	___ Influencing	___ Steady	___ Cautious
___ Self Certain	___ Optimistic	___ Deliberate	___ Restrained
___ Adventurous	___ Enthusiastic	___ Predictable	___ Logical
___ Decisive	___ Open	___ Patient	___ Analytical
___ Daring	___ Impulsive	___ Stabilizing	___ Precise
___ Restless	___ Emotional	___ Protective	___ Doubting
___ Competitive	___ Persuading	___ Accommodating	___ Reserved
___ Assertive	___ Talkative	___ Modest	___ Tactful
___ Experimenting	___ Charming	___ Easy going	___ Consistent
___ Forceful	___ Sensitive	___ Sincere	___ Perfectionist
___ Direct	___ Outgoing	___ Emphatic	___ Reflective

7. Order form for additional support materials

Ideally, each person in your organization involved with business development should have their own Behavior Profile instruments and PAL frames. Being familiar with behavior styles will make it easier to analyze each client situation. The PAL frames are indispensable tools of the presentation design method. Contact us for current pricing.

_____ *DiSC® Preview* (C-203)

_____ *DiSC Classic Personal Profile System 2800* (paper version) (C-888)
This instrument represents a more extensive introduction to behavior and decision styles than the *DiSC Preview* version. *DiSC Classic* provides more explanations and suggestions. An on-line web-based version is also available.

_____ sets of 10 each *DiSC Sales Action Planner* (C-172)

_____ *DiSC Classic Facilitators Kit* (B-888) for those who want to have detailed background material to teach the concepts to their staff.

(Five copies each of the *DiSC Preview* and the *DiSC Sales Action Planner* are included with the package of videos.)

_____ PAL frames (5 PAL frames are included in the package of videos)

_____ sets of the videos on DVD

This material is available from:

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