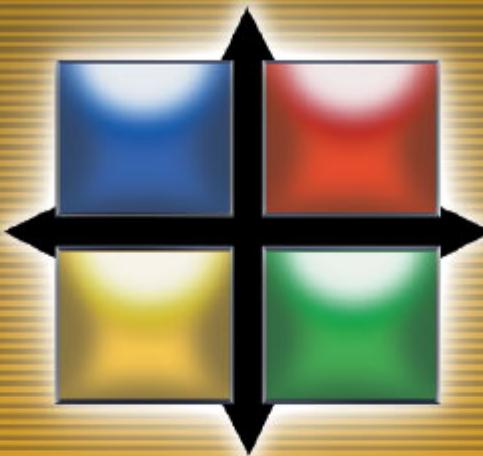


*Discover How Your Behavioral Style Will  
Help—or Hinder—Your Business Growth*



**THE  
PLATINUM  
RULE®**  
*for*

**SMALL BUSINESS MASTERY**

*“Do Unto Others As They Want Done Unto Them”*

DR. TONY ALESSANDRA  
SCOTT MICHAEL ZIMMERMAN  
RONALD FINKLESTEIN

## ***What others have said about The Platinum Rule...***

***“The ability to communicate effectively with others is the key to success and happiness. Tony Alessandra has [created] the most important, practical, and effective [concept] ever imagined.”***

– **Brian Tracy**, Author, *Maximum Achievement*

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***“The Platinum Rule is a must for all of us who want to be better in our interactions with others.”***

– **Ken Blanchard**, Co-author, *The One-Minute Manager* and *Raving Fans*

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***“Apply [these ideas] to your own activities, each day, and watch your career and your life change for the better”***

– **Og Mandino** Author/ Speaker

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***“The Platinum Rule breaks all the old rules of communications ... cuts like a laser to the heart of the human personality ... yours and your customer’s ... it’s a learning and earning tool for the times.”***

– **Harvey Mackay**, Author, *Swim with the Sharks Without Being Eaten Alive*

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***“Dr. Tony Alessandra’s work brilliantly provides effective insights for improving communication in any and all situations.”***

– **John Gray**, Ph.D., Author, *Men Are From Mars, Women Are From Venus*

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# **The Platinum Rule®... for Small Business Mastery**

**By**

**Dr. Tony Alessandra**

**Ronald Finklestein**

**Scott Michael Zimmerman**

*Foreword by Noah St. John*

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Finally, a big hug to Noah St. John for taking the time to provide his critical eye to this book. Noah, your rare combination of Thinker and Director, but with the heart of a Relater and the ability to inspire like a Socializer!

## Dedications

I dedicate this book to my mother, Margaret Alessandra, who instilled in me the drive and determination that helped me become successful in marketing, in selling, in business and in life.

– Tony Alessandra

To Sweet P: bless you for supporting me during the times when it looked like I may have been wrong... some wild ride, huh? Tony: thank you for letting me share in your greatest discovery: **The Platinum Rule**, and for providing me with opportunities and confidence. Ron, thanks for showing me how much can be accomplished through focus and determination; here's to *your* continued business success! To all of my clients who failed forward with me, added to my knowledge base, challenged my thinking and shared in a few successes along our mutual journeys. To Bosko and Max Maksimovic of Elite Business Solutions: your sweat, time, money, faith and business acumen are the only reasons Cyrano and I are both alive and thriving today. Glenn: thanks for your talent, your loyalty, your friendship and for providing me with spiritual inspiration. Jim Cathcart: you have profoundly impacted my life... twice! You introduced me to Tony *and* you wrote "The Acorn Principle"; the only book that showed me how God made me perfect to fulfill His purpose in my life. To Charlie "Tremendous" Jones for having the wisdom to write the words that changed my life: "*The difference in the person you will be five years from today are the books you choose to read and the people you choose to associate with.*" To Kevin Baer: for having the strength to ask me to surrender my life to Him. I thank God for showing me His grace, love and mercy the moment I accepted His Son as my personal savior.

– Scott Zimmerman

I dedicate this book to my wife Sheila of over 30 years. The best 30 years of my life. Here's to 30 more. Your love and support means so much to me.

– Ronald Finklestein

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# Foreword

**by Noah St. John**

*Author of "Permission to Succeed®"*

“What do Donald Trump, the Dalai Lama, Robin Williams, and Stephen Hawkins have in common?”

Actually, since you’re businessperson, that’s the wrong question.

The question you should be asking yourself is this:

*“If I were about to go into a meeting with Donald Trump, would I approach it the same way as I would a meeting with the Dalai Lama, Robin Williams, or Stephen Hawkins?”*

If you answered “yes,” you (and your business) may be in for a heap of trouble.

*But, do you know why?*

This book holds the answers – and shows you a better way—not just to conduct meetings or make sales calls—but to live your life.

Most of us were taught The Golden Rule: “Do unto others as you would have them do unto you.”

But if you faithfully apply this rule to your business, you’ll actually create more problems than you can imagine.

*Why? Because not everyone is like you!*

Not everyone has the same priorities, cares about the same things, or thinks the same way as you do. Some people talk fast, others talk slow. Some look you right in the eye, while some look away while they’re thinking. Some like to be the life of the party, and some like to observe from a distance.

Before I met the authors of this book, I tried to sell everyone the same way. I’m kind of a take-charge kind of guy, so I naturally assumed that everyone wanted me to get right to the point and get down to business.

I also interacted with colleagues and vendors in a direct, fast-paced manner (this is how I like others to behave around me).

I didn’t realize it at the time, but my style of communicating was turning certain people off from even hearing my message. The good thoughts that were in my head and my heart most often failed to hit home; not by what I was saying, but *how* I would say it!

After applying the principles in this book, my sales started to skyrocket. People became more open to my ideas. I also began appreciating the differences in people to a higher degree than ever before.

My colleagues, family and friends began responding positively to my suggestions and requests.

I also took a hard look at the types of tasks I was doing within my own business. Because I learned the strengths and weaknesses of my behavioral style, I began outsourcing and delegating work that I knew would be a waste of my time. Both my productivity and profitability grew while my stress levels decreased.

Oh, and one more wonderful thing happened – I started to have a lot more fun in my business! Before every seminar, workshop and keynote speech I delivered, I would remember that my audience was comprised of different types of people, who each processed information in a different way. Once I began tailoring my speeches and presentations to fit the four behavioral styles, my audiences started to hang on my every word (yes, even the Thinkers!) and I realized I had hit the mother lode!

This book may just hold the key to your business success. Because all businesses are run by, staffed by, and accountable to **people**—all different types of people—the more you understand, appreciate, and communicate effectively with the four behavioral styles, the more happy, effective, and successful you'll be... not just in your business, but in every other aspect of your life.

As I have, I hope you also prosper from the wisdom contained within this book!

To your success,

Noah St. John  
Author of ***Permission to Succeed***<sup>®</sup>  
[www.SuccessClinic.com](http://www.SuccessClinic.com)

## Introduction

**The Platinum Rule for Small Business Mastery** is based on research that goes back over 2,400 years. It is based on validated concepts that have been simplified for use in our daily lives. Understanding the behavioral styles of other people, and adapting how we relate to each style, is the foundation of **The Platinum Rule®**. Dr. Tony Alessandra, the creator of The Platinum Rule, took the complex subject of human behavior and simplified it so each one of us can use it... *immediately*.

The Platinum Rule is not hard to use or understand, but it is extraordinarily powerful. Once you master this concept, you will enjoy better relationships, more loyalty from employees and clients, an increase in sales and more referrals.

The first section of this book is written specifically to teach you The Platinum Rule. You will learn how to quickly and accurately identify the four specific behavioral types. You will then discover their individual strengths and weaknesses and how to leverage what works for each style. Finally, you'll learn to understand and appreciate the unique ways that each of these four types typically behaves in work and social settings.

The four behavioral styles are **Director**, **Relater**, **Socializer**, and **Thinker**. After reading this book, you will be able to not only identify each style, but also lead, manage and motivate each based on their style.

**Universal application:** Every day of our lives, we are dealing with people: at work, at home, in selling situations, in negotiations, while socializing, managing, motivating or entertaining. Wouldn't it be nice to eliminate stress associated with wondering why people respond the way they do? The Platinum Rule makes this not only possible, but easy and effortless (after practice)!

This book is written for business owners and managers who want to get more control over their businesses and achieve more balance in their personal lives. The Platinum Rule helps you, the business owner, understand how and why employees, customers and associates behave the way they do. It also teaches you to how to adapt your behavior around each of them to achieve the most effective results; lowering interpersonal tension while increasing cooperation.

The second part of the book contains the results of what other business owners (under \$50M/year in revenue) did to become successful. All the companies we studied effectively said the same thing, though they used very different language, to describe the steps they took to attain their accomplishments. The common elements are defined and distilled into twelve actionable steps you can use as a roadmap to implement predictable business growth. The twelve action items are quite strong and they have been used to make powerful changes in many different businesses.

When we discuss small business success, we are not focusing exclusively on sales or marketing. We are discussing how growth happens when changes are made in other areas of your company. Improvements made in customer service, for example, will have a profound impact on other areas within a company. The same holds true for information technology, training, business process improvement and the other action steps documented in this book. By marrying The Platinum Rule with the Twelve Action Steps for Small Business Mastery, you, the business owner, will gain clarity in what it takes to become successful and how to build on each victory.

**People, productivity and processes...** As leaders and business owners, we have an obligation to our employees (and to ourselves) to create the best organization possible. This includes using employees in ways that make work meaningful for them *and* productive for your customers. Using The Platinum Rule, not only can we easily identify the type of work that is most conducive to the strengths of specific behavioral styles, you will

understand what behavioral style is necessary for you to grow your business. This is what the book is really about: teaching you, the business owner, how to target the correct employee and design your processes, procedures, roles and job descriptions to produce measurable and predictable results.

If you want more control in your business, more personal time, more sales growth, and a way to identify your ideal clients, you should read this book. If you are happy with the status quo, put this book down; no need to read it. You already understand how creating a specific company culture can eliminate hiring mistakes and attract the right people to your organization. If it is not important for you to learn how to use information technology to gain a competitive advantage... read no further. If you are not interested in creating measurable, repeatable, predictable business processes that ensures you get positive results over and over again, put this book down. Taking action on what you learn is the only way to change the outcomes you get from your business.

This is a fun book to read. You will see your behavior described in detail. At times, you will swear that we have hidden cameras and microphones in your office. We don't, but you'll think we do. You will more clearly understand why some things work and others do not. You will understand why some people excel in your company while others struggle. We have provided you a proven roadmap to success. As you read this book, feel free to highlight areas that make sense, underline areas where you can make changes, and fold down the tips of pages that you need to reread. This book will change your business for the better.

**Tip:** we strongly suggest that you begin writing a "Platinum Rule Journal." Write specific ideas and/or action steps in a separate document, so that you won't need to flip through entire books (not just this one) again and again to revisit key ideas.

### Inside "The Platinum Rule"...

*When you learn to adapt to another's behavioral style, people will like you, respond positively to your ideas, and they will become happy employees that are more productive.*

The Platinum Rule is a matching process: matching the right people with the right job. It is matching a product or service to the corresponding set of customer needs, matching your sales pace to the customer's buying pace, and matching your selling style to the buying style of every customer. The ability to adapt your style to your customers' styles helps you build rapport and develop strong, lasting relationships.

The Platinum Rule is a modernization of The Golden Rule, which states: "*Do unto others as you would have them do unto you.*" Don't get us wrong, The Golden Rule is a great rule to live by. We believe in it 110%, especially when it comes to honesty, values, ethics and having consideration for the needs of others.

However, during interpersonal communications, The Golden Rule can backfire (if practiced by the letter of the law) because others may not wish to be treated exactly the way you like being treated.

When Tony Alessandra was a young man, he learned this lesson first-hand when he moved from New York to San Diego. He practiced The Golden Rule verbatim by treating the people in Southern California the way he liked to be treated... as a New Yorker. He came on too strong; he was too assertive and just "too fast" for most of the laid-back people on the West Coast. He rubbed many people the wrong way, which prompted them to "dig in their heels" and few responded positively to his requests.

Fortunately, he soon realized that people are diverse and each needed to be treated differently. As he became more self-aware, he coined the phrase "The Platinum Rule," which states:

*“Do unto others as **they** would have **you** do unto **them**.”*

Or, more simply stated:

*“Treat others the way **they** want to be treated.”*

**The Platinum Rule** is a more sensitive version of the ancient axiom. That is, learn to understand the behaviors of others and interact with them in a style that is best for them, not just easy for you.

You only need to adapt *small behaviors*, so that, while retaining your own identity and ideas, you can lead others in the way they like to follow, speak to them in ways they are comfortable listening and sell to them in ways they prefer to buy.

When you gain understanding about your own style (and how to recognize the other styles), you can then adapt your approach to stay “on the same wavelength” with other people. Your ideas do not have to change, but you can change the way you present your ideas. This is called **adaptability**.

Adaptable people realize there is a difference between their inner self (who they are) and their external behavior (how they choose to act). Adaptability is simply changing behaviors; not personality, values or beliefs. Adaptable people consciously decide to modify their behaviors to a particular person, a situation, or an event. Less adaptable people, on the other hand, respond in a more habitual manner, regardless of whether the response is likely to be appropriate or effective.

When you treat people the way they want to be treated, you are paying attention to their wants, needs and expectations. You are walking in their shoes to understand their feelings, see their point of view and identify their purchasing requirements. This builds trust, friendship and respect... three requirements for any strong relationship.

Getting along with others is the universal key to success. In fact, studies have shown that the ability to build rapport with others is the one thing all highly successful people have in common. Mastery of The Platinum Rule is the key to opening the door to successful relationships in all areas of your life... beyond a successful career in sales and/or management.

To apply The Platinum Rule, you need to understand how people want to be treated; this requires a basic understanding of personal style and behavior. Throughout the ages, philosophers and psychologists have developed various models to explain these key differences. The guide presented here gives you a powerful tool to help you build rapport with your prospects, customers, colleagues, employees and referral partners. We have based our model on decades of research and validation; yet it is simple, practical, and easy to use and remember. We make it easy to identify the preferred style of your customers, associates, friends and family members.

*Note: One of the strengths of The Platinum Rule is that we have taken a very complex behavioral and psychological concept and made it relatively easy to understand. However, we also know that “understanding” and “application” are two different outcomes. Therefore, we have purposely mixed spaced repetition with a variety of stories, examples and exercises to reinforce critical points throughout this book. You may experience occasional thoughts of, “Didn’t they already tell me that?”, but we encourage you to stop reading during those moments and really give meaningful thought to each concept we want you to “own and apply.”*

**Section I** describes the four behavioral styles, and it helps you understand your own natural behavioral style. If you have never taken an accurate test to help you understand your behavioral style, you should visit <http://www.yourbusinesscoach.net/assessments> and take The Platinum Rule assessment. Understanding your own strengths and weaknesses is the first step toward increased self-awareness.

**Section II** describes the two basic behavioral dimensions and gives you a simple process of elimination to help you identify another persons' behavioral style.

**Section III** describes how to reduce "relationship tension" to help you establish and maintain rapport with others. This requires behavioral adaptability on your part, so you can easily connect with those who have styles that are different from your own. You will not learn ways to manipulate others; you will learn skills that to help you identify and satisfy other's needs to help them achieve their goals... and yours.

**Section IV** discusses how to implement The Platinum Rule in your business. By thoroughly understanding your natural behavioral style and how your style would help you (or hinder you) during the twelve steps, you will learn when and where to adapt, hire and/or outsource to attain positive results.

***The Platinum Rule for Small Business Mastery*** is different from any other methodology used by corporations today. The Platinum Rule for Small Business Mastery is used to grow your business by growing your people; understanding their strengths and weaknesses and knowing how to utilize your employees in ways that makes them more productive for your organization. We are challenging you to *master* one of the most reliable methods for identifying the Behavioral Style of your employees, and to lead them to greater successes.

Consider this: there are four behavioral styles and you have **one** of them. If you treat all your employees based on the way you like to be treated, then you are only connecting with those who share your style. In various ways, you may be disconnecting with the three other styles, greatly limiting the success of these relationships. When you read this book, do the exercises and adapt to the behaviors styles of your employees, you will immediately enjoy more success. Additionally, if you carry your new way of thinking into other aspects of your life, you will become a better spouse, parent, friend, neighbor, etc...

***The Platinum Rule for Small Business Mastery*** is not only a better way to grow your business... *it's a better way to live!*

## Section I - *The Four Behavioral Styles*

For some of you, the “4 styles” model of human behavior is a new concept. However, many of you have probably run across this concept on more than one occasion. “Behavioral styles,” “personality types” and “temperament types” are methodologies that have been around for many, many years.

People have been fascinated with studying behavioral styles for thousands of years. Starting with the early astrologers, theorists have sought to identify these behavioral styles. In ancient Greece, for example, the physician Hippocrates outlined four temperaments: Sanguine, Phlegmatic, Melancholic, and Choleric... more than four decades before the birth of Christ. In 1921, famed psychologist Carl Jung (the first to study personal styles scientifically) labeled people as Intuitors, Thinkers, Feelers, and Sensors. Since then, psychologists have produced more than a dozen models of behavioral differences, some with sixteen or more possible blends. Some teachers have drawn metaphors (as teaching aids) to birds, animals, or even colors. Nevertheless, a common thread throughout the centuries is groupings of human behavior in four categories.

Many of the concepts discussed in Section I of this book are based upon the proven concepts described in Dr. Tony Alessandra’s and Dr. Michael O’Connor’s books, “PeopleSmart” and “The Platinum Rule.”

We will now introduce you to the four **behavioral** styles that are used throughout this book: the Director, Socializer, Thinker and Relater. As you read the description of each style, try to visualize someone who exhibits behavior specific to each style. Ask yourself whether you would have been a more successful with them had you adapted your behavior to match their style.

## Chapter One - Directors... *The Great Initiators*

Directors initiate change, momentum and growth. They focus on attaining their goals, and their key need is to achieve their bottom-line results. The driving need for results, combined with their motto of "Lead, follow, or get out of the way," explains their no-nonsense, direct approach to getting things accomplished.

Directors are driven by an inner need to be in personal control. They want to take charge of situations so they can be sure of attaining their goals.

### Directors Need Achievement and Control

Directors want to win, so they may naturally challenge people or practices in the process. They accept challenges, take authority and plunge headfirst into solving problems. They tend to focus on administrative and operational controls and can work quickly and impressively by themselves.

Directors are naturals at being in control. They tend to be independent, strong-willed, precise, goal-oriented, and competitive with others... especially in a business environment. They try to shape their environment in order to overcome obstacles en route to their accomplishments. They demand freedom to manage themselves and others, and use their drive to be on top to become winners.

Directors like to get things done and make things happen. They start, juggle and maintain many projects concurrently. They may continue to add projects to their juggling routine until they are overloaded and then drop everything. They call this a "re-evaluation of their priorities." After reducing their workload, and stress levels, they often immediately start the whole process over again. Their motivation pattern contributes to a Director's tendency to be a "workaholic."

Their primary skills are their ability to get things done, lead others and make decisions. Directors have the ability to focus on one task... at the exclusion of everything else. They can block out doorbells, sirens, or other people while channeling all their energies into the specific job at hand.

### On the Other Hand

With each of the four behavioral styles, negative traits may accompany many of the positive attributes. Any characteristic, when taken to an extreme, has a shadow side.

For the Director, some negative traits may include stubbornness, impatience and an appearance of toughness. Directors tend to take control of other people and can have a low tolerance for the feelings, attitudes and shortcomings among co-workers and subordinates. Directors may annoy others because their constant need to come out on top can be offensive. With the Director, there are not "nine ways to skin a cat," there is only *one way*... the one preferred by the Director!

Directors like to move at a fast pace and tend to become impatient with delays. It is not unusual for a Director to call someone and launch into a conversation without saying "Hello." Oftentimes, Directors tend to view others who move at a slower speed as less competent.

Their weaknesses tend to include impatience, intolerance, poor listening habits and insensitivity to the needs of others. Their complete focus on their own goals and immediate tasks may make them appear aloof and uncaring.

One other thing to remember about Directors is that they will hold you to the terms of any agreement (written, spoken or implied). However, the same rules may not apply to them, because if the terms of the

agreement become inconvenient to them, they will lobby hard for you to bend the rules to accommodate their needs. If this happens, offer concessions sparingly (giving in will be seen as weakness) and be prepared to defend your decision to stick to the original agreement. Whenever you give a concession to a Director, get one in return – concession for concession. You might offer to negotiate new terms on future agreements. Earning respect with Directors is critical to a long-term relationship.

## Directors are Decisive

Directors embrace challenges, take authority, make decisions quickly, and expect others to do the same. They prefer to work with people who are decisive, efficient, receptive, competent and intelligent.

You may often find Directors in top management positions, and their personal strengths often contribute to their success in jobs such as a hard-driving reporter, a stockbroker, an independent consultant ... or a drill sergeant! Under pressure, Directors often get rid of their anger by ranting, raving or challenging others. While relieving their own inner tensions, they often create stress and tension within others. Tony often jokes that Directors rarely get ulcers, but they are carriers!

### “Winning isn’t Everything...”

The competitive nature of the Director is captured by Vince Lombardi’s now-famous statement that, “Winning isn’t everything... it’s the only thing!” Directors can be so single-minded that they forget to take the time to “stop and smell the roses.” If they do remember, they may return and comment, “I smelled sixteen roses today ... how many did you smell?”

## The Social Scene with Directors

Directors tend to take charge in social settings... sometimes inappropriately. Their relationships would improve if they would demonstrate their respect for other people’s rights and opinions, allowing others to take charge... while “letting go.” Directors have trouble having fun for fun’s sake and usually have a specific purpose in mind. The competitive Director has a tendency to try to win... even in relaxed social settings. He is always conscious of his standing in the “biggest and best” games. “Who has the biggest house?” “Who gives the best parties?” “Who plays the best golf?”

Directors often intertwine business and friendships. They like to mix their own business interests with pleasure, so they often pick friends from their work pool. Friendships often hinge on how much the friend agrees with the Director and helps him achieve his goals. Potential friendships are like an experiment with the Director: If it works, fine. If not, goodbye!

Director humor can be biting, often directed at others. Directors tend to take themselves too seriously and could benefit from learning to relax, laugh more and enjoying the lighter side of their own—and others’—actions.

### Typical social behaviors of the Director may include:

- Competing actively in almost everything
- Participating in games or contests to win
- Wanting to know the purpose of a function
- Talking shop at gatherings
- Choosing friends by experimentation

**Preferred social situations for a Director:**

- Having many options from which to choose, for example: either jogging, attending an event, dining out, or playing cards
- Paying more attention to tactile things; less to emotions
- Doing only what they prefer to do
- Occasions that favor direct humor with an opportunity to demonstrate their talents
- Having a group subject to their control
- Being in charge of something at social events and activities: judging, giving directions, chairing a fund-raiser

**The Director Style at Work**

The Director can be an excellent problem solver and leader. Higher power positions and/or career areas motivate Directors (situations where they can take charge).

**You will often find Directors in the following types of positions:**

- President, CEO, or small business owner
- Politician
- Law enforcement officer
- Military officer
- Executive
- Manager
- Entrepreneur
- General contractor
- Coach

A typical Director sees him or herself as a solutions-oriented manager who enjoys a challenge just “because it’s there.” Directors like the opportunity to complete tasks in a creative manner. Directors are generally viewed as having a high level of confidence, even when it isn’t actually the case. The Director is often the first person to arrive in the morning and the last person to leave in the evening. At the extreme, Director’s high results orientation can lead to an overextended work pattern and result in neglect for their personal and social lives.

Directors are often the first person at work to have a new efficiency “toy.” They were the first to have a computer, a fax, mobile phone and (of course) a PDA. Saving time is always a priority for Directors so they can accomplish more.

Directors gain energy by taking risks. They do not feel as bound by conventional restrictions as other types and often feel free to bend rules that get in the way of results. They seek opportunities for change (or they create them!) just to satisfy their need for results. They may even gravitate toward high-risk situations because the excitement of the challenge fuels their drive to exert control in new areas or ways.

Directors realize that results can be gained through teamwork (and may actually develop a management approach that demands and supports teamwork). The nature of the Director is to focus on his own individual

actions and accomplishments. In his biography, Lee Iacocca, former CEO of Chrysler Corporation (a “Director legend”), discusses how he learned to merge his temperament with other styles as he finally arrived at the following management philosophy: “In the end, all business operations can be reduced to three words: people, products, profits. People come first. Unless you have a good team, you can’t do much with the other two.” Iacocca knew that good people were the means to an end.

**Director business characteristics include:**

- Prefers controlled timeframes
- Seeks personal control
- Gets to the point quickly
- Strives to feel important and be noteworthy in their jobs
- Demonstrates persistence and single-mindedness in reaching goals
- Expresses high ego need
- Prefers to downplay feelings and relationships
- Focuses on task actions that lead to achieving tangible outcomes
- Implements changes in the workplace
- Tends to freely delegate duties, enabling them to take on more tasks and pursue more goals

**The preferred business situations for Directors:**

- Calling the shots and telling others what to do
- Challenging workloads to fuel their energy levels
- Personally overseeing, or at least knowing about, their employees’ or co-workers’ business activities
- Saying what’s on their minds without being concerned about hurting anybody’s feelings
- Taking risks and being involved in facilitating changes
- Interpreting the rules and answering to themselves alone
- Interested in the answers to “what” questions
- Seeing a logical road toward advancement of achieving goals

**Directors at a Glance:**

- Need to be in charge; dislike inaction
- Act quickly and decisively
- Think practically... not theoretically or hypothetically
- Want highlighted facts
- Strive for results
- Need personal freedom to manage self and others
- Like changes and new opportunities

- Prefer to delegate details
- Cool, independent and competitive
- Have a low tolerance for feelings, attitudes or advice of others
- Work quickly and impressively by themselves
- Want to be recognized for their accomplishments
- Easily stimulated to engage in arguments and conflict
- Interested in administrative controls

## Chapter Two - Socializers... *The Great Talkers*

Socializers are the great talkers because they are friendly, enthusiastic and like to be where the action is. They thrive on admiration, acknowledgement, compliments and applause. They want to have fun and enjoy life. Energetic and fast-paced, Socializers tend to place more priority on relationships than on tasks. They influence others by their optimistic, friendly demeanor and they focus primarily on attaining positive approval from others.

### **Socializers need attention and approval**

Admiration and acceptance are extremely important to Socializers. Often, Socializers are not as concerned about winning or losing as how they look while “playing the game.” The Socializer’s greatest fear is public humiliation: appearing uninvolved, unattractive, unsuccessful or unacceptable to others. These frightening forms of social rejection threaten the Socializer’s core need for approval. As a result, when conflict occurs, Socializers may abruptly take flight for more favorable environments.

The Socializers’ primary strengths are their enthusiasm, persuasiveness and friendliness. They are “idea-a-minute” people who have the ability to get others caught up in their dreams. With great persuasion, they shape their environments by building personal alliances to accomplish their results. Then they seek nods and comments of approval and recognition for those results. If compliments do not come, Socializers may invent their own! They are stimulating, talkative and communicative.

Socializers are generally open with their ideas and feelings, but sometimes only at superficial levels. They are not as prone to “wearing their hearts on their sleeves” as Relaters, but will happily share their thoughts and ideas about almost any topic at any given time. They are animated, interactive storytellers who have no qualms about “creative exaggeration.” They love an audience and thrive on involvement with people. They tend to work quickly and enthusiastically with others. They are risk takers and base many of their actions and decisions on natural impulse and feelings. Their greatest irritations are doing repetitive or complex tasks, being alone, or not having access to a telephone!

### **On the Other Hand**

Their weaknesses are too much involvement in too many projects, impatience, aversion to being alone, and short attention spans. They become bored quickly and easily. When a little data comes in, Socializers tend to make sweeping generalizations. They may not thoroughly investigate; assuming someone else will do it, or they may procrastinate because re-doing something just isn’t exciting enough. When Socializers feel they do not have enough stimulation and involvement, they get bored and look for something new... repeatedly.

When taken to an extreme, Socializer behaviors may appear superficial, haphazard, erratic and overly emotional. Their need for acknowledgement can lead to self-absorption. They have a casual approach to time and often drive the other styles “crazy” with their missed deadlines and lateness. The fun loving, life-of-the-party Socializer can be undisciplined, forgetful, overly talkative, and too eager for credit and recognition. Their natural humor often bubbles over even in serious situations, which should have called for more reserved behavior.

Socializers are often found in positions such as sales, public relations specialists, talk show hosts, trial attorneys, social directors on cruise ships, hotel personnel and other people-intensive, high-visibility careers. Audience reactions stimulate them and they thrive in entertainment fields where their natural, animated actions can flow easily. They like to charm friends, co-workers and audiences with their friendliness and enthusiasm.

You probably know some Socializers in your family, at the office, or at home. They are the ones who always have something to say. They are the people you ask, "How is it going," and twenty minutes later, they are still talking your ear off. The thing they love to talk about the most is one thing in particular... themselves.

## The Social Scene with the Socializer

Socializers love people and specialize in socializing. Most aspects of their lives are open books and they are likely to discuss most subjects, no matter how close or distant your relationship. Showing and sharing their feelings come naturally to this behavioral type. Of the four styles, Socializers are the most comfortable talking about personal topics: marriage, finances, politics, aspirations and problems. They jump from topic to topic and activity to activity, often leaving their listeners bewildered.

Socializers revel in humor (even if directed at themselves) and often tell hair-raising anecdotes about their experiences. The wilder the situation the better... and a little embellishment only makes their stories sound that much more exciting and entertaining. They view this tendency toward stretching the facts as spicing things up to be more interesting to the listener. They love to talk; telling a story better and funnier than it actually happened comes naturally to them.

This tendency to talk and tell stories can be a problem when privacy or confidences are involved. A Socializer naturally considers all conversations to be an open book, and unless they're expressly told not to tell anyone about the topic, they are not likely to realize the importance of keeping confidences.

Socializers are naturally optimistic and ready with an encouraging pep talk when the people around them are down or have problems. They praise and support others, in part, in order to create a positive environment where they can satisfy their own needs for social approval. Compliments and encouragement make them feel good, even when the praise is directed at someone else!

Socializers like to be the life of the party. You will often find them in the middle of a circle of admirers. Their willingness to discuss any topic often invites controversy and they love a lively debate. They gain energy from the dynamics of relationships and talking; they despise feeling bored. People rally around them because they know how to create fun and find (or make) the action. They are playful and enjoy companionship; they hate isolation.

Of the four types, Socializers most want to be liked by others. They will monitor the body language, vocal inflections, and eye contact of others to make sure they are being viewed in a favorable light. Should they detect that they have fallen out of favor among those they are entertaining, they will work even harder to win back the good graces of others. It hurts their feelings when disliked by others; even the slightest criticism can be deflating.

Socializers love being the first on the block to have a new "toy" ... especially if it has lots of bells, whistles, and lights! Their involvement with gadgets is a form of fun as well as a way to simplify their workload. Additionally, showing off their new toy gives them more opportunities to promote and persuade.

Socializers are notorious for being "fashionably late." People may think they are trying to make a grand entrance, but often their being late generally results from their casual approach (and resulting miscalculations) to time. They often forget details of social obligations and get so caught up in what they are presently doing that they lose track of time and place.

### Typical social behavior of the Socializer includes:

- Wants to be liked and admired

- Fears public humiliation
- Discusses most subjects, regardless of how distant or casual the relationship
- Naturally warm, expressive and enthusiastic
- Enjoys bouncing ideas off others
- Reluctant to fight or confront stressful people or situations
- Perceives life according to feelings
- Naturally discusses emotions with others
- Chooses associates and friends by “gut instinct” and trial-and-error

**Preferred social situations of the Socializer:**

- Events and activities involving personal interaction and contact
- Hosting or attending impromptu gatherings
- Being with fun people with different interests
- Seeks more positive people and settings
- Finds it easy to laugh, joke and play games
- Often seeks high-visibility positions: host, storyteller, emcee, etc...
- Prefers humor that pokes fun at foibles... their own and others'
- Tries to diffuse mild tension with jokes or funny observations
- Prefers to ignore sources of stress (such as conflict or complex tasks)
- Likes to share the moment with others

**The Socializer's Style at Work**

Socializers prefer careers that maximize their influence and persuasion with other people. They tend to gravitate to environments that allow them to socialize, mingle, and gain positive feedback.

**Socializers often work in these types of careers:**

- Customer relations
- Public relations
- Entertainment: acting, singing, reporting, public speaking... being on stage or in the public eye
- Professional host or emcee (talk show, party, restaurant, airline, etc...)
- Recreational director
- Politician
- Salesperson
- Teacher

Socializers are happy working with other people. They like being treated with warmth, friendliness, and approval. Because they favor interacting with people on more than just a business level, they want to be your friend before doing business with you.

The Socializer likes a quick pace and often moves about the office in a flurry of activity. The Socializer even walks in a way that reflects his optimism and pace ... lively and energetically. Socializers tend to think aloud and often walk around the office talking to almost everyone. While this may appear to be "goofing off" to more Director-style managers, Socializers pick up much of their information by talking to others and observing their surroundings. Socializers are likely to brainstorm about matters with virtually everyone they encounter. It's important for them to find out how other people feel about their ideas. Socializers also like feedback and occasional pats on the back that these impromptu encounters provide. Socializers enjoy a casual, relaxed environment where their impulses can have free rein. Desk hopping also satisfies the Socializer's need for companionship. Socializers like to play and mingle as they learn, earn and do practically everything else.

Since Socializers are naturally talkative and people-oriented, dealing with people who are in positions of power meet their need for inclusion by others, popularity, social recognition and relative freedom from a lot of detail. Socializers are good at getting others caught up in their ideas. Their persuasive powers may simultaneously amaze admirers and frustrate detractors. These smooth-talking tendencies can (at their extreme), be perceived as silver-tongued oration or evasive double-talk. The Socializer may appear to be a verbal Pied Piper or even a wheeling and dealing con artist.

Socializers want companionship and social recognition, so their contributions to group morale often satisfy those needs. They encourage their employees, peers, and superiors to excel. Socializers typically look outside themselves to renew their energies and enjoy motivational books, tapes and speeches. Socializers need these pick-me-ups to recharge their batteries and help them overcome obstacles. A Socializer's typically optimistic outlook changes problems into challenges or opportunities.

The Big Picture is much more interesting to Socializers than supporting details. After seeing the broad overview, they prefer not to personally dwell on specifics. Their natural enthusiasm helps them generate many ideas, and their tendency to get feedback from everyone around them helps select ideas that have a good chance to succeed.

The Socializer's tendency to talk more than the other styles sometimes gets them in trouble by saying inappropriate things. Socializers are naturally impulsive; sometimes their spontaneous behavior is energizing, but sometimes it is frustrating. Socializers continually seek out new ideas. Sometimes this is irritating to the people around them who think that a solution has been settled upon... only to have the Socializer start off on a new round of potential solutions. While others think the Socializer was committed to something, the Socializer just thought he was thinking aloud. Socializers are much better at generating ideas than implementing them.

Socializers do not respond well to authoritative or dictatorial management styles, often possessed and displayed by the Director, especially under stress or tight deadlines. The boss that orders the Socializer to do one thing may receive just the opposite. The Socializer may get defensive and become less willing to cooperate. On the other hand, the boss that chooses to take the time to inspire the Socializer to accomplish something, will find it hard to find a more dedicated, committed, hard worker. This is particularly true once the Socializer has had time to "connect" the significance of the work to their dreams, their financial future, or sees it as a chance to "shine" in front of management or a client.

**Socializers' business characteristics include:**

- Likes to brainstorm and interact with colleagues and others
- Wants freedom from control, details, or complexity
- Likes to have the chance to influence, persuade or motivate others
- Likes the feeling of being a key part of an exciting team
- Wants to be included by others in important projects, activities or events
- Gets easily bored by routine and repetition
- May trust others without reservation; takes others at their word and does not check for themselves
- Typically have short attention spans, so they do better with frequent, short breaks
- Prefer talking to listening

**Preferred business situations for Socializers include:**

- Likes to work interactively with others
- Needs personal feedback and discussion to get – or stay – on course
- Likes to mingle with all levels of associates and calls them by their first names
- Enjoys compliments about themselves and their accomplishments
- Seeks stimulating environments that are friendly and favorable
- Motivated to work toward known, specific, quickly attainable incentives or external motivators (dislikes pursuits which drag out over long time periods)
- Open to verbal or demonstrated guidance for transferring ideas into action
- Likes to start projects, but prefers to let others handle the follow-through and detail work

**Socializers at a Glance:**

- Craves interaction and human contact
- Enthusiastic, expressive and lively actions
- Spontaneous actions and decisions
- Concerned with approval and appearances
- Emotion-based decision makers
- “Big picture” thinkers who get bored with details
- Likes changes and innovations
- Needs help getting and staying organized
- Dislikes conflict
- Maintains a positive, optimistic orientation to life

- Exaggerates and generalizes
- Tends to dream aloud and gets others caught up in their dreams
- Jumps from one activity to another
- Works quickly and excitedly with others
- Seeks acknowledgement from others
- Likes to exercise their persuasive skills

## Chapter Three - Thinkers... *The Great Analyzers*

Thinkers are analytical, persistent and systematic problem solvers. They are more concerned with logic and content than style. Thinkers prefer involvement with products and services under specific, controlled, predictable conditions so they can continue to perfect the performance, process, and results.

### Thinkers Seek Order, Precision and Predictability

The primary concern of the Thinker is accuracy; this often means that emotions take a back seat. They believe feelings are more subjective and distort objectivity. Their biggest fear is of uncontrolled emotions and irrational acts, which might prevent the achievement of their objectives. They are uncomfortable with emotionality and/or irrationality in others. Thinkers strive to avoid embarrassment by attempting to control both themselves and their emotions. Of the four styles, Thinkers are the most risk-conscious and have a high need for accuracy. Combining these factors may lead them to an over-reliance on the collection of information and input from too many sources.

Thinkers prefer to deal with tasks rather than people and they like to have clearly defined priorities. They like to operate at a methodical pace, which also allows them to check and recheck their work. They tend to focus on the serious, more complicated sides of situations but, when they are relaxed, their natural mental wit does enable them to appreciate the lighter side of things. They are often the first to see the bizarre nature or potential in situations.

Of the four styles, Thinkers are the most cerebrally oriented. They make decisions logically and cautiously to increase the probability that they take the best available action. They are deliberate and strive to be technically perfect. Thinkers demand a lot from themselves (and others) and may succumb to overly critical tendencies. Generally, they tend to keep their criticisms to themselves, hesitating to tell people what they think is deficient or incorrect. They typically share information, both positive and negative, only if requested, or on a need-to-know basis... and only if they have received assurances that there will be no negative consequences to them.

When Thinkers have definite, precise knowledge of facts and conditions, they quietly hold their ground. They can be indirectly assertive when they perceive they are in control of a relationship or their environment. After determining the specific risks, margins of error, and any other variables that significantly influence the desired results, they will take action. Often times, their action may be subtle and indirect. However, if they can control the outcomes, their actions may be more swift and direct.

Strengths of the Thinker include accuracy, independence, clarification and verification, fine-tuning and organization. They naturally focus on expectations (e.g.: policies, practices, and procedures), processes and outcomes. They want to know how things work so their own actions can be correct. Their core personal need is for autonomy in controlling the processes involved in fulfilling expectations in moving toward the intended outcomes.

Thinkers tend to be serious and orderly and are likely to be perfectionists. They tend to focus on the more critical details in the process of work and become irritated by surprises or glitches. They like organization, structure, and dislike involvement either with too many people or with any one person for too long a period. They work meticulously by themselves and prefer objective, task-oriented, intellectual work environments. Thinkers remain disciplined with their own use of time and are most comfortable under controlled circumstances. They can be skeptical and even become cynical. They like to see things in writing as a way of measuring or validating expectations and feedback from others.

## On the Other Hand

Because Thinkers like to be right, they prefer checking processes themselves. This tendency toward perfectionism, when taken to an extreme, can result in “analysis paralysis.” These overly cautious traits may result in worry that the process is not progressing exactly right, which further promotes their tendency to behave in a critical, detached way.

Thinkers may appear to be aloof, meticulous and critical. Their fear of being wrong can make them over-reliant on the collection of information and slow to reach a decision. While Thinkers are natural observers who ask many questions, they may focus too much on downside possibilities and remote dangers... at the expense of missing up-side opportunities and bottom-line payoffs.

In their effort to avoid conflict, Thinkers often refrain from voluntarily expressing their inner thoughts and feelings. This lack of direct feedback may lead to future misunderstandings and weaken relationship-building opportunities.

## The Deep Thinker

Perhaps you live or work with someone who is quiet, individualistic, slow to speak or show emotion, and covets his or her privacy. Oftentimes, there is a lot going on inside their head as they agonize over what to do next, how their feelings operate, and ultimately, the process of doing the right thing. They tend to put their emotions under a microscope then analyze and reanalyze them to make sure their response was proper given the stimulus that set them off.

## On the Social Scene with the Thinker

The Thinker is a contemplator, examining the pros and cons of any given situation and trying to consider everything. Their need to weigh possibilities and ramifications can cause stress for other (more impetuous) behavioral types, and sometimes Thinkers contemplate a situation until the opportunity slips away completely. However, the Thinker’s innate caution can serve to offset the more impetuous ideas or decisions.

Thinkers are astute observers of their surroundings. They absorb virtually everything around them, taking in and processing information about people and things. Many Thinkers report having difficulty falling asleep or getting back to sleep if they wake up during the night because they can’t turn off everything that is running through their minds. Thinkers fascinate themselves by processing many of the complexities of life (that often escapes the other types).

Thinkers typically act reserved and distant until they feel they know you well enough to let down their guard; building trust with them often takes time. They plan and select their relationships cautiously. Because they are such private people, they sometimes seem mysterious or even conniving.

Unlike Socializers, Thinkers do not prefer team sports or group recreational pursuits. Being more on the introverted side, they like to engage in independent indoor and outdoor recreational activities. In the outdoors, you may find them bird watching, kayaking, hiking, camping, fishing, etc. Indoor activities may include stamp collecting, painting, music, computer games, board games, model building, woodworking, etc. Regardless of the activity, Thinkers often become experts in their hobby or endeavor. Indeed, the one way to get a Thinker to have a conversation is to ask about his or her hobby or recreational pursuit. You may discover that you will learn much more about the subject than you ever wanted to know!

Since Thinkers do not readily discuss their feelings or often even their thoughts, their non-verbal responses can speak volumes about how they really think or feel. That first little smirk or quick, one-syllable laugh can tell you that they are pleased. Watch the Thinkers' body language for indicators of how they feel about someone or something.

Thinkers are not comfortable telling stories or anecdotes about themselves. When pressed for an opinion or reaction, they may sidestep the issue completely. Being asked to "talk about their feelings" is a request that strikes fear in the heart of the Thinker, because they are not comfortable doing it.

Thinker humor typically shows a down-home, dry, witty perspective, often from an unexpected angle. Perhaps you have seen those comics that deliver the jokes in a deadpan manner; they do not "act funny," but what they say is clever, witty, and points to life's ironies... Bob Newhart and Steven Wright come to mind. Even though they do not express feelings and thoughts easily, they often capture them with timeless stories that contain penetrating insights about human nature.

Small groups of people are much more comfortable for the Thinker since it takes them time to establish a comfort zone with others. They are fearful of mistakes or criticisms and interact with people who pose no threat to them.

#### **Typical social behavior of the Thinker includes:**

- Quiet and observant; likes to collect information before entering a relationship
- Socially cool and distant; waits for other to take the initiative
- Discreet and tactful; not likely to tell secrets or the naked truth
- Serious; suspicious of others unless they have previously proven themselves
- Guarded; prefers a small group of friends and work associates

#### **Preferred social situations of the Thinker include:**

- Attending a planned, private small gathering of close friends who have consistently proven to be trustworthy in the past
- Participating in organized activities where they can demonstrate (and be appreciated for) their expertise
- Conversing logically about areas of personal knowledge, adding key input to the conversation
- Talking, and listening to, ideas and facts, not feelings
- Conflict-free environments which prize individuality

#### **The Thinker's style at work:**

Thinkers prefer careers in which they can strive for perfection, creativity and completeness.

#### **Thinkers often work in these types of positions:**

- Forecasters (political, weather, etc...)
- Critics (film, history, literary, etc...)
- Engineers
- Research scientists

- Data analysts
- Accountants/auditors
- Artists/sculptors/architects
- Inventors
- College professors
- Veterinarians
- Technicians and mechanics

Thinkers see themselves as logical problem solvers who like structure, concentrate on key details and ask specific questions about critical factors. They are masters at following important, established directions and standards, while still meeting the need to control the process by their own actions. Process-oriented Thinkers want to know why something works, since such insight allows them to determine for themselves the most logical way to achieve the expected results... from themselves and others.

In business, Thinkers are the refiners of reality. They seek neither utopias nor quick fixes. Because of their risk-averse tendencies, they may overly plan when change becomes inevitable. Planning is their way of improving their odds. They like working in circumstances that promote quality in products or services. When possible, they prepare ahead of time for their projects and then work diligently to perfect them to the nth degree. Their thorough preparation minimizes the probability of errors. They prefer finishing tasks on schedule, but not if it might be at the expense of making a mistake. They dislike last minute rushing and inadequate checking or review.

Thinkers prefer logic and rely on reasoning to avoid mistakes. They tend to check, recheck, and check again. They may become mired down with accumulating facts and over-analysis. They are uncomfortable freely giving opinions or partial information until they have exhausted all their resources. This process can frustrate other behavioral types who want to know what is going on now.

Whether or not this type opts for a scientific or artistic career, Thinkers often follow a rational method or intuitive, logical progression to achieve their objectives. Because of their natural inclination to validate and improve upon accepted processes, Thinkers tend to generate the most native creativity of the four types. Consequently, they often explore new ways of viewing old questions, concerns and opportunities.

Thinkers seek solace and answers by focusing inwardly. Their natural orientation is toward objects and away from people. From their perspective, people are unpredictable and complicate matters. With more people added to the formula, the chances of getting unpredictable results increase. Thinkers choose to work with colleagues who promote objectivity and thoroughness in the office. When encouraged to do so, Thinkers can share their rich supplies of information with co-workers who can benefit from their wealth of experience and knowledge.

When discussions and tempers become hot and heavy, Thinkers may start looking for an exit... or at least a fallback position to reassess their strategy. They want peace and tranquility and tend to avoid and reject hostility and outward expressions of aggression. They can numb themselves to conflict to such an extent that they may have difficulty tapping into their feelings. They can become perfectionistic and worrisome, both with themselves and with others.

### **Business characteristics of the typical Thinker include:**

- Concerned with process; wants to know how something works
- Intuitive and original; once they know the expected structure, they may invent their own structure, method, or model
- More interested in quality than quantity; prefer lower output to inferior results
- Wants to be right; employs logical thinking processes in order to avoid mistakes
- Sometimes impedes progress with their constant checking and rechecking
- Dislikes unplanned changes and surprises
- Rejects open aggression

**Preferred business situations for the Thinker include:**

- Colleagues and superiors who do not criticize work or ideas, especially in public
- Situations where they can set the quality control standards and check to see if they are properly implemented
- Working with complete information systems, or being empowered to formulate their own methods
- Superiors who value correctness and the Thinker's key role in the organization
- Organized and process-oriented workplaces with little emphasis on socializing

**Thinkers at a Glance:**

- Thinks logically and analytically
- Needs data and their questions answered
- Likes to be right, correct
- Likes organization and structure
- Asks many questions about specific details
- Prefers objective, task-oriented, intellectual work environment
- Needs to understand processes
- Are cautious decision makers
- Prefers to do things themselves
- Works slowly and precisely alone
- Likes to be admired for their accuracy
- Avoids conflict and over-involvement with others
- Likes to contemplate and reconsider
- Likes problem solving methods and approaches

## Chapter Four - Relaters... *The Great Helpers*

Relaters are warm, supportive and predictable. They are the most group-oriented of the four styles. Having friendly, lasting, first name relationships with others is one of their most important desires. They dislike interpersonal conflict so much that when they disagree, they will often keep silent. At other times, they may say what they think other people want to hear. They have natural counseling tendencies and are supportive of other people's feelings, ideas and goals. Other people usually feel comfortable interacting with Relaters because of their low-key, non-confrontational nature. Relaters are natural listeners and like to be part of networks of people who share common interests.

### Relaters Need Respect and Tranquility

Relaters focus on getting acquainted and building trust. They are inwardly flustered by pushy, aggressive behavior. They are cooperative, steady workers who function well as team members. They strive to maintain stability and to create a peaceful environment for others. While "venturing into the unknown" may be an intriguing concept for some other types, Relaters prefer to stick with what they already know and have experienced. *Risk* is a dangerous word to Relaters. They may even stay in an unpleasant environment rather than take chances by making a change. Disruption in their routine patterns can cause them distress. When faced with a change, they need to think it through slowly, systematically and piece-by-piece in preparing for the change. Finding elements of sameness within those changes can help minimize their stress.

Relaters yearn for more tranquility and constancy in their lives than the other three types. They operate on an emotional plane that has occasional, moderate mood swings from melancholy to happy. They rarely have emotional highs like that of the Socializer, but the change is noticeable. This reflects their natural need for composure, stability and balance. Their relationships are generally amiable and their relaxed disposition makes them approachable and warm. They are easy-going, calm and operate at a deliberate, measured pace.

The primary strengths of Relaters are their accommodation, appreciation for, and patience with, others. They are courteous, friendly and willing to share responsibilities. They are good implementers who are persistent and will usually follow through on the completion of action plan steps; they do so because they hate to let other people down or fear confrontation.

### On the Other Hand

Relaters have difficulty speaking up and expressing their true feelings, especially if it might create conflict. They appear to go along with others even when they inwardly do not agree. This tendency creates an environment where the more aggressive types may take advantage of the Relater. Their lack of assertiveness sometimes results in hurt feelings because they do not let others know how they truly feel. They can be overly sensitive and easily bullied.

Their need for harmony makes them slower at making decisions as they privately try to find solutions that most likely lead to consensus. People of other styles often view this behavior as being weak or indecisive. In fact, their slow but deliberate pace results from their desire to minimize risk in unknown situations, partially by inclusion of others in the decision making process. The Relater's need to stay personally involved in the detailed aspects of work often makes them hesitant to delegate effectively. They often would rather shoulder more work than inconvenience someone else by asking for help.

Relaters are often found in the helping professions such as: counseling, teaching, social work, ministry, psychology, nursing and human resource developments. Relaters are among the most patient and supportive parents.

## The Social Scene with the Relater

Relaters are quiet, evenly paced and inwardly focused individuals. They recharge their batteries and renew their energy by looking for answers within themselves and a relatively small group of friends, family and associates. As warm and open as they may appear, they have private thoughts that they are reluctant to divulge. Their energy drains when called upon to share how they feel about private matters or controversial topics that may offend someone. They would rather sit back, observe other's feelings, and then offer a more measured response based on their perception about how their opinion would be received. They are naturally tuned-in to the overall group dynamics as well as the feelings of the individuals that comprise the group.

Relaters are uncomfortable with intangibles. They dislike deviating from the established, proven order... such as when dealing with abstractions. They prefer instead to follow a predetermined, straightforward procedure. They are on firm ground when working with concrete realities such as known products, people, systems and procedures.

They like routine, predictability and defined limits. They tend to anchor the other types with their patience, cooperation and follow-through. They need a firm grip on the facts before feeling ready to proceed, so they prefer systematic information whenever possible. They enjoy team efforts and willingly work to bolster comfortable, efficient working conditions. Relaters support and encourage other members of their group.

At parties, Relaters like to seek out people they know well and are more likely to attend an event with another invitee with whom they are already comfortable. Often, they wind up talking with that same person all night unless they are encouraged to move about more and mingle. They prefer to be approached by others, and project such a serene, accepting attitude that other people seek them out.

Relaters dislike being in the spotlight and prefer working behind the scenes and letting others be the stars. They share credit willingly and freely. They choose friends by using the test-of-time method, and Relaters tend to have long-lasting relationships. They often keep in touch with childhood friends, former teachers or even retired doctors. Because familiarity feels so comfortable to them, they may prefer to live in the same neighborhood or area as they did during childhood. Memorabilia tends to mean more to the Relater than it might for some of the other types. Nostalgia makes them feel more connected to the present, giving them a sense that things can stay the same even as time passes by. Consequently, they tend to be possessive about things they own which have personal significance for them and their relationships.

Relaters often use conformity as a means to satisfy their need to feel included by others. They find it easy to listen and have a natural preference for participative communication. One problem facing Relaters is that their aversion to hurting people's feelings may make them respond in an indirect, subtle manner. They find it hard to say "no" and often allow the more assertive types to take advantage of them. Their willingness to listen makes them virtual shock absorbers or sounding boards for the opinions, ideas, experiences and frustrations of others.

Relaters tend to stick with things that have worked in the past. In most aspects of their lives, new or different things do not appeal to them as much as the good old, tried-and-true. The same activities other types perceive as monotonous often appeal to a Relater's desire for repetition. For them familiarity does not breed

contempt... but contentment! They find it difficult to reach beyond their comfort zone and take chances. Although they might remain quiet about resisting change, they may secretly decide to passively revolt.

Relaters display a rather plain, straightforward, seemingly uncomplicated sense of humor. They look at life from a mainstream, commonplace perspective with predictable results in the punch line. Often, the listener can guess the outcome of their joke before it is ever completed.

Persistence is a word often used to describe Relaters. They do not give up easily and can persevere for years. This single-minded resolve can be taken so far as to be seen as stubbornness!

Relaters naturally let little annoyances slide, overlooking things that bother the other types more. Although Relaters exhibit more patience than many of their counterparts, they sometimes allow certain irritations to build up for so long that the burden becomes overwhelming. Because they do not like to rock the boat, they may give in rather than take issue with something. Relaters bruise easily; you may hurt their feelings without realizing it. Relaters can appear almost saintly, simply because they often keep quiet whenever something bothers them. They do not want anyone to dislike them. When the chips are down, they are likely to clam up, going into their own protective shell. They often think that if they say what is on their minds, they may be less likely to keep the friendship. As a result, they will avoid confrontation – their biggest fear – at almost any cost.

Their desire for peace and stability can motivate Relaters to succumb to compromise just to maintain favorable conditions or to avoid conflict. Ironically, instead of jeopardizing their position with others, speaking up and/or taking a stand can sometimes enhance their position... especially with people who may view their tendency to give in as weakness. Voicing their feelings before reaching the end of their tolerance level can actually help Relaters salvage some relationships before it is too late.

Relaters are most comfortable with small groups of people whom they've known for a long time and have had a history of pleasant relationships. They prefer events and activities that are planned (or at least known about) in advance. This provides them with a more predictable experience with defined dimensions... such as when things start and finish, who will be there and what activities may occur.

The best social world for a Relater is one where everyone would act friendly, pleasant and cooperative. No one would strongly disagree, shout, participate in rowdy scenes or talk anyone into anything against his or her will.

**Typical social behaviors for the Relater include:**

- Building ongoing relationships with a smaller number of people
- Wanting to be involved in (and identified with) their group
- Relating to others on a one-to-one basis, preferably with predictable role behavior by each person
- More casual, low-keyed, amiable relationships
- Giving and then receiving sincere attention
- Seeking stability in their lives through practices such as conformity

**Preferred social situations of the Relater include:**

- Participating in the group's communication and activities
- Performing regular activities in the same way, at the same time, and at the same place (bowling or golf leagues, bridge club, poker night, etc...)
- Communicating in a conflict-free environment with associates or friends
- Settings that facilitate easy conversations
- Wanting to know how to play games or complete activities through well-defined, step-by-step procedures
- Feeling appreciated and well-liked by others, just for being who they are

**The Relater Style at Work**

Relaters prefer constancy in their positions and careers, so they can focus on learning to specialize in specific areas and be part of a team. You might find Relaters in the following positions:

- Financial services
- Social worker
- Family doctor/nurse
- Psychologist/counselor
- Residential or community services
- Teacher/professor
- Personal assistant/secretary
- Insurance agent
- Customer service representative

In business and in their personal lives, Relaters take one day at a time and may consciously avoid gambles and uncertainties. They tend to respect the proven status quo and are likely to accommodate others while they trek along. Because stability in the workplace motivates them, Relaters are apt to have the most compatible of all working relationships with each of the four types. Relaters have patience, staying power and persistence, so they commit themselves to making relationships work.

Relaters are extremely uncomfortable with disagreement, often withholding negative observations. They do not want to make waves and they do not want to appear to be know-it-alls. Silently, they may feel as if they're shouldering the lion's share of the duties, but they are unlikely to complain about this to others.

When they need to make a presentation, Relaters prepare thoroughly and organize their material in advance. Since they feel comfortable with proven methods, they like to acquaint themselves thoroughly with each step of a procedure so they can duplicate it later. Sometimes, when this is taken to extreme, this adherence to following instructions and maintaining the status quo can limit their effectiveness.

The Relater's patience and inclination to follow procedures makes them a natural choice for assisting or tutoring others, maintaining existing performance levels, and organizing practices. They often enjoy setting up or implementing guidelines or checklists that enable others to be more organized in their follow-through efforts.

Relaters prefer to resolve problems by working with others as part of a team and using tried-and-true, proven methods. If these tactics fail, the Relater may quietly do nothing. When conflict and stress increase, the Relater's tolerance may decrease, resulting in lowered performance or even absenteeism as a way of coping with the stress.

Relationships, which provide them with security, friendliness, and large doses of routine, attract the Relater. Teaching is a natural career for Relaters as it fills their natural desire for repeated group and one-to-one people contact, preference for sameness and the opportunity to help or support others.

Inherently modest and accommodating, Relaters usually think their actions speak for themselves. Inwardly, they may want to divulge a personal triumph, but they won't volunteer it or brag about it. Rather than asking for a promotion, the Relater will quietly hope the supervisor notices their good work and offers them a reward.

Since Relaters seek security and inclusion within a group, they can contribute to the workplace with their natural organizing talents, consistent pace, and desire to fit in. They favor work relationships on a casual, first name basis, and enjoy developing more in-depth friendships with selected co-workers. They contribute to harmony in the office, but sometimes become overly dependent on using the same old methods repeatedly even when they work less and less effectively.

The Relater is the optimistic realist among the four types. As a pragmatist in this regard, they like to do routine things with familiar people to maintain the same situation. They perform regularly and deliberately toward this end of holding onto continuity, peace and orderliness. Changes and surprises make them uncomfortable because they alter the current formulas. Relaters prefer refinement to dramatic changes.

**Typical business characteristics of the Relater include:**

- Needs to know the order of procedures; fears the unknown
- Slow and steady; builds strong and deep relationships, but with fewer people
- Operates well as a member of the work group
- Motivated by customary, known, proven practices
- Oriented toward more concrete, repeatable actions
- Wants order and stability in the workplace
- Focuses on how and when to do things
- Works in a steady and predictable manner
- Likes a long-term relationship with their place of business and their fellow employees

**Preferred business situations of the Relater include:**

- Performing the same kinds of duties day after day (no matter the importance of the type of work involved)
- Working cooperatively with others to achieve common results
- Safe, risk-free environments
- Stable, steady, low-key environment which has a minimum of changes
- Knowing each step toward completing their duties within a defined framework of time and resources
- Making decisions by group consensus or other accepted practices rather than only by themselves
- Feeling like an appreciated, contributing member of the work group

**Relaters at a Glance:**

- Concerned with stability
- Thinks things through in an orderly manner
- Wants documentation and facts
- Needs personal involvement
- Takes action and make decisions slowly
- Needs to know the step-by-step sequence
- Avoids risks and changes
- Dislikes interpersonal conflict
- Works slowly, but cohesively with others
- Tries to accommodate others
- Wants tranquility and peace
- Seeks security and sense of belonging

- Enjoys teamwork
- Wants to know they are appreciated
- Possesses excellent counseling talents

**End-of-Section Activities**

To retain more of the information presented in this section of this book, we recommend that you take the time to answer a few questions. This will enable you to begin your journey of adapting your style to the style of others, improving your results and quality of your relationships.

- Develop a thumbnail sketch of behaviors that are unique to the Director.
- Develop a thumbnail sketch of behaviors that are unique to the Relater.
- Develop a thumbnail sketch of behaviors that are unique to the Socializer.
- Develop a thumbnail sketch of behaviors that are unique to the Thinker.
- If you are reading this book in a public area (e.g., airport, restaurant, hotel or office lobby), look around and see if you can identify someone who is a Director, Relater, Socializer, and Thinker. What behaviors are they exhibiting that lead you to your conclusion?
- Think of your family members, co-workers, friends, etc. Can you pick out those that are Directors, Relaters, Socializers, and/or Thinkers? What is it about their respective behaviors that helped you arrive at your decisions?
- Try listing three or four occupations that people of each style might pursue:
  - Directors
  - Relaters

- Thinkers
  - Socializers
- 
- How do you think that learning to identify the behavioral styles of others will make you a better leader?
  - Which of the four styles do you think might take the shortest time to make decisions and why?
  - Which of the four styles do you think might take the longest time to make decisions and why?

## Section II - *Identifying the Four Behavioral Styles*

In this section, you will learn two simple techniques that will get you well on your way to reading the behavioral styles of others. You will discover different ways to determine whether each individual is more Direct or Indirect and more Open or Guarded. In doing so, you can quickly determine if every person is acting like Director, Relater, Socializer or Thinker at any given point in time.

**Preface to this section:** The point of this book is to teach the reader how to build rapport and establish credibility. If you find that your style is “Indirect,” please be aware that your roundabout, slow-paced delivery style may frustrate Direct (faster pace) people during conversations. Direct people may become bored or distracted during conversations that are monotonous, slow and/or lack focus. Conversely, Indirect people often view Direct people (fast talking and/or animated) with skepticism. Read on with an open mind and a desire to learn how to communicate your ideas effectively with everyone you encounter. *The Platinum Rule* is based upon observable behaviors, NOT “personalities” or “temperaments.” This distinction is critical because human beings may often change their behavior in the middle of a conversation. When you learn to adapt to the behavior that you are witnessing, you will stay in rapport with that person.

## Chapter Five - Identifying Your Customers' Styles

There are two “dimensions” that help us determine another person’s style:

1. **How “Direct” or “Indirect” their behaviors are, and;**
2. **How “Open” or “Guarded” they are in revealing private thoughts.**

When you correctly read both of these dimensions, you have determined the other person’s natural style and are well on their way to a better relationship.

### Direct Behaviors

The dimension of “directness” deals with the amount of involvement a person uses to meet his needs by seeking to influence people and situations. Directness means the tendency to move forward, outwardly expressing thoughts, feelings or expectations.

Direct people come on strong, take the social initiative and create a powerful first impression. They tend to be assertive, fast-paced people who make swift decisions and take risks. They can easily become impatient with others who do not keep up with their pace. As active people who talk a lot, they appear confident and sometimes dominant. Direct people tend to express opinions readily and make emphatic statements. Such individuals try to shape their environment and relationships directly. “Tell Stevenson that I want to talk to him ASAP!” barks a Direct person; a more Indirect may ask his secretary to see if Mr. Stevenson would please come to his office, when it is convenient.

Direct people are faster paced, more assertive and more competitive than Indirect people. At worst, these tendencies sometimes transform into hastiness, combativeness, or a lower awareness of others’ needs. More outspoken, talkative, and dominant, Direct people are extroverts who focus their attention on interests within their immediate environment. In other words... action! They tend to work and play faster. When at a social gathering, they’re the ones who introduce themselves as a natural way of seeking to influence others.

Direct people prefer to make rapid decisions, often becoming impatient when things do not move fast enough or do not go their way. Checking for errors is something other people can do; it’s too time-consuming and self-involving for Direct people. Instead of checking, they busily rush into new areas where the more Indirect may fear to tread. In fact, they often rush into so many new areas that their time seems to evaporate into thin air. That’s one reason why they have difficulty consistently being prompt... because something comes up at the office or somewhere else. Meanwhile, their more punctual, Indirect friends learn to busy themselves with time killers, such as projects or magazines, while waiting for their more easily side-tracked companions.

Direct people may enjoy taking risks and want results now (or yesterday). Risks are a way of life with them. Not only are they less worried about rocking the boat, they’ll often tip it over and splash around in the hot water they helped create. They crave excitement, so they do as much as possible to get it.

The more Direct type feels that if they throw enough stuff against the wall, something has to stick. “Who cares if the output isn’t perfect? Did it work?” they ask. If so, that is the direct-ion they were looking for. Quantity beats quality (within limits known only to them) most days of the week. Therefore, they are likely to tolerate a higher error rate than their Indirect counterparts to gain a higher number of trial opportunities, even if their success ratio is lower. They generally figure that the number of successes is more important than the percentage of successes. They play for high stakes results with sizzle.

Direct people are the “home run” crushers, not “get on base,” high-average hitters. Direct people “swing for the fences” with gusto! They focus on the one-in-ten grand slam while quickly erasing the memories of the strikeouts that occur between connecting with the “big one.”

Anyone involved in telemarketing or outside sales realizes that the road to success is littered with rejection and setbacks. Direct people excel in these jobs because they’re able to take “no’s” ... they simply go out and find more prospects. Aware that the “yes’s” are out there somewhere, they’re determined to unearth them. The Direct salesperson says to himself, “The odds are definitely in my favor now. I’m due to land one!” Indirect people tend to take “no’s” as personal rejections, responding by examining other alternatives which do not force them to stick their own necks out again. The Indirect salesperson says, “Maybe if I send out a direct mail letter first, then follow up by phone, I’ll increase my chances of getting a yes.” An Indirect salesperson sometimes invests too much time and effort in low-payoff marketing activities (sending letters, brochures, etc...) because they can “selling indirectly” without having to hear “No” from the prospect.

Direct people point, finger jab, or otherwise more observably express themselves. They are verbally intense and expressive. “Take it or leave it,” a Direct person exclaims, “this is the way it’s going to be, so get used to it!” They emphasize their points of view with confident-sounding vocal intonations and assertive body language.

Speaking with conviction, fast-talking, Direct people like to tell – not ask – about situations. If you want to know the answer, just ask them. They can even become brutally blunt: “Are you sure that’s a custom suit? It looks more like a horse blanket ... ha, ha, ha. I’m just kidding, of course!” While other Direct types might join in the laughter, the Indirect person is sensitive to feelings and is likely to be thinking, “Gosh, I wonder what would possess someone to come right out and say something like that?”

Impatient and quick-paced, Direct people jump into things, so they get into more “iffy” situations than their Indirect counterparts do. Just as the songs of the sirens lured sailors to their doom, the windows of opportunity beckon to Direct people. Sometimes they net huge results and sometimes they encounter dramatic disasters. Wherever inclination takes them, their natural tendency is to do their own thing... as long as it includes doing something.

When windows of opportunity do crack open, the Direct types cannot wait to tell somebody about their idea or plan of action. Therefore, they seek out willing listeners – usually of the Indirect variety – about the opportunity... even if it includes a gray area in policies and procedures. The Indirect types listen and often reply with a cautious, “It sounds interesting, but it also raises a lot of questions. Have you asked anyone else for their opinion... like the boss?”

The Direct replies, “Ask the boss? Forget that... he might say ‘no!’ Then what would I do? My hands would be tied.” The truly Direct person’s motto might be, “It’s easier to ask forgiveness afterwards than seek permission beforehand.”

Summary: Remember... one “dimension” is not “better” than the other. People who are more direct in their behaviors have certain advantages than those who are less direct. However, they also have disadvantages, especially when dealing with people who are less direct than they are. We are not “picking on” people of certain behaviors, we are simply pointing out behaviors.

## Indirect Behaviors

On the opposite side of the Directness spectrum, we find the quieter and reserved group... the Indirect people. They may be seen as more easygoing, or at least more self-contained in keeping their views to themselves. Indirect people ask questions and listen more than they talk. They typically do not share their

opinions or concerns. When asked to take a stand, they may either make tentative statements or say nothing at all. They often appear more objective, introverted and indecisive.

When taken to an extreme, these positive traits can be viewed as negative: indecisive, tight-lipped, unassertive behaviors. Indirect people are less confrontational, less demanding, less assertive, and less socially competitive manner than their Direct counterparts. They allow others to take the social initiative. For instance, when they want to go to the movies or a restaurant, they might think to themselves, "I'd rather see that new romantic-comedy movie." However, when their spouse or date suggests the latest action-adventure epic, they often go along without mentioning their own interests. If they disagreed with the suggestion, they may go so far as to say, "Gee, I heard that other movie was really well received. Are you sure you wouldn't rather try that one tonight?" Usually, their desires remain unspoken.

Indirect people tend to be more sensitive toward risk: moving cautiously, meditating on their decisions and avoiding big changes. As a result, they often avoid taking bold chances or acting spontaneously. After all, what is the best way to keep from failing? One way is to do nothing. In other words, only do sure things. Sure things result in a higher success ratio. These choices are more attractive for Indirect people.

When Indirect people flop, they tend to take the setback personally. They are likely to internalize or privately reassess any failure, often wondering if there's something wrong with them. "How could I have been so stupid?" the Indirect asks himself after a setback. Just give them a hint that something is going wrong, and reserved folks may engage in negative self-talk for days. By contrast, the Direct type seldom has extra time to spend looking back and reflecting on such considerations.

Indirect people tend to move at a slower, more measured pace than Direct people do. For them, "sooner or later" is good enough. They speak and respond more slowly since they are more cautious or stability-focused when considering change. They tend to seek increases in security while looking for ways to reduce fear. If their behavior becomes too measured, detractors (usually Direct people) may view this as dragging their feet, or even lacking interest.

Predictability is more important to such Indirect people, so they tend to weigh pros and cons, attend to details and fact-find. Caught in a gray area with no clear-cut guidelines, they usually ask for clarification or permission before they take action. They seek to meet their needs by accommodating the requirements of their environment. They tend to operate according to established formats and rules, so when you make an appointment with an Indirect person, you can expect that individual to show up on time, or possibly be waiting on you!

Indirect people tend to communicate by asking or observing instead of stating or showing. Their questions attempt to clarify, support, or seek more information. They prefer qualified statements and speak more tentatively, often taking a roundabout or systematic approach. "According to some sources," or "It seems to be" and "Perhaps another way of looking at this situation might be to consider..." are common ways Indirects preface a comment, idea or opinion. If they do not like something, they respond subtly: "Well, other people have often commented about how good you look in your navy pinstripe suit," is an Indirect's way of telling you she dislikes the brown suit you are wearing. They reserve the right to express their opinions or keep them to themselves. In some cases, they can also act like impregnable vaults when they do not feel like sharing information.

## Typical Behaviors

Direct people, to borrow a Wall Street metaphor, are the "bulls." They can be forcefully expressive, Type-A personalities who confront conflict, change, risk and decision-making head on... without giving it a second thought.

Direct people are outspoken communicators and often dominate business meetings. They will tell you their opinions even if you do not want to hear them, and if they want your opinion, they'll give it to you!

Direct people are competitive, impatient, and at times, confrontational. They bulldoze their way through life. They often argue for the sake of arguing. They hold eye contact longer than average and possess an air of confidence. Their handshakes are memorable for their firmness.

Direct people thrive on accomplishment and are not overly concerned with rules and policies. They are more likely to look for expedient ways to attain their goals than to focus on obstacles or setbacks. Ambiguity does not deter them; it encourages them. They take advantage of gray areas and call them "windows of opportunity."

Indirect people are Wall Street "bears." They approach risk, decision-making, and change cautiously. They are the "meek who shall inherit the earth." They are the Type-B personalities who are slow-paced and low-key in their approach with others.

Indirect people are tentative, reserved communicators. They are not eager, high-profile contributors in meetings (although their insights can be very valuable). When solicited for their opinions, they often preface their statements with qualifications such as: "Have we all considered what might happen if..." or "According to the theories/principles of..."

Indirect people avoid open conflict whenever possible. They are more diplomatic, patient and cooperative. On unimportant issues, they will conform rather than argue. When they have strong convictions about an issue, however, they will stand their ground... often simply by withholding the approval being sought from them. They often base their delays on the need for additional research, pending contracts, or missing data. When they are less than completely convinced, they subconsciously weigh an issue's importance against the discomfort of confrontation.

Indirect people are low profile, reserved and gentle. For example, their handshakes are sometimes soft, and they speak at a slower pace and lower volume than direct people. They do not take the initiative at social gatherings, but prefer to wait for others to approach them.

## Reading Behavioral Styles

For those who did not take the online Platinum Rule Assessment at <http://www.yourbusinesscoach.net/assessments>, this next section is a quick way to identify your style (and the styles of others). In doing so, you are well on your way to having better relationships with people at work, socially and at home.

As you seek to know your style – and that of others – bear in mind that people are not simple creatures; they can be infinitely complex. Every person possesses each of the styles to some degree; so expect to find shades of gray... not black and white. However, people do have one dominant style that rises above the other three that gives them their uniqueness. Yes, there are instances where a person may be direct in one setting (work) but indirect when at home; they may be open with their significant other, but guarded with co-workers. So, always deal with the person in the behavior that they are demonstrating at the particular moment in time you are interacting with them.

Before you learn how to "read" the behavioral styles of others, identify your own style. On the following page, you will find a chart of Indirect and Direct behaviors. Read each description of behaviors and check the one that most closely describes your behavior. For example, do you tend to "avoid risks" or "take

risks?" Check the one that most describes your behavior. Remember, one is not "better" than the other; this is simply a way to begin developing the skill of reading the behavioral style of yourself and others.

Check here if this behavior sounds most like you	"Indirect Behaviors"	or	"Direct Behaviors"	Check here if this behavior sounds most like you
	I tend to be slower paced	or	I tend to be faster paced.	
	I tend to listen more than talk.	or	I tend to talk more than listen.	
	I am reluctant to directly express my opinions.	or	I find it easy to directly express my opinions.	
	I usually react slowly when faced with new situations or decisions.	or	I usually react quickly when faced with new situations or decisions.	
	I make decisions after all the facts are available.	or	I make decisions whether or not all the facts are available.	
	I come across as less assertive than others.	or	I come across as more assertive than others.	
	I tend to "bite my tongue" when I don't agree with someone.	or	I tend to "speak my mind" when I don't agree with someone.	
	I get frustrated when things move too quickly.	or	I get impatient when things move too slowly.	
	I generally avoid conflict.	or	I do not avoid conflict.	
	<input type="checkbox"/> Total "Indirect" checkmarks		Total "Direct" checkmarks	

First, having checked the items that most describe you, are you more Indirect or more Direct?

Next, determining whether you express yourself in a more "open" or "guarded" manner will enable you to pinpoint your behavioral style (and that of other people).

## Open or Guarded?

### *Do They Wear Their Heart On Their Sleeve... or Hide a Card Up Their Sleeve?*

While Direct individuals attempt to control the people around them, Indirect types prefer to exercise control on their environment. In addition to Direct/Indirect, the other dimension of observable behavior that people tend to exhibit is Open or Guarded. This second behavioral scale explains the internal motivating goals behind our daily actions. The Open/Guarded dimension relates to why we do the things we do in the way we do them.

When combined, these two scales explain both the tendency to reveal our thoughts and feelings, plus the degree to which we tend to support other people's expressions of their thoughts and feelings.

### **Open Behaviors**

*Open people* are motivated by their relationships and feelings. They are open to getting to know people and they tend to make decisions based on feelings, experiences and relationships.

The Open person is emotionally available and shows it by talking with his body, using more vocal inflections, making continual eye contact, and communicating in terms of feelings more than the Guarded types. Other Open clues are animated facial expressions, a large amount of hand and body movement, a flexible time perspective and immediate, non-verbal feedback. Open people also like to tell, or listen to, stories and anecdotes and make personal contact. They are comfortable with emotions and openly express their joy, sadness, confusion and other emotions.

Open people respond to passing interests – their own and others' – even though this may take them away from the business or subject at hand. They like to make conversations enjoyable, so they often stray from the subject to discuss personal experiences and interests. As long as it's in the ballpark, they figure it's probably relevant. An Open person might say, "That reminds me of the time Uncle Jed got stuck on the Garden State Freeway in a snowstorm . . ." Exaggeration of details just adds interest by fully depicting personal experiences.

Open types are also more accepting about time usage. Their time perspective is organized around the needs of people first and tasks second, so they are more flexible about how others use their time than the Guarded types. "I'm sorry I'm late," explains an Open person, "but Jimmy was crying this morning because Jason broke his science project. I had to write a note to his teacher and cheer him up before I dropped him off at school."

### **Guarded Behaviors**

If Open types seem like an open book, Guarded people tend to be more poker-faced. Guarded types like to play their cards close to the vest to increase their probability of getting the upper hand and appearing foolish. Guarded types are motivated by completing tasks and accomplishing their goals. They usually like to keep their distance, both physically and emotionally. They will not readily touch you and they do not like being touched by strangers, casual friends or business associates. People often comment that once they get to know a Guarded person, "He's a really great guy; it's just hard breaking through his thick shell."

Guarded people tend to stand further away from you (even when shaking hands) than Open types. They have a strong sense of personal space and they dislike it when someone invades their territory. They feel invaded when you take something from their desk, use personal items without permission, or call meetings (requiring their time) without asking their input.

Guarded people show less facial expression, displaying limited or controlled hand and body movement, and adhere to a more time-disciplined agenda. They push for facts and details, they focus on the issues and tasks; they keep their personal feelings private. They are not naturally “touchy-feely,” and they tend to respond stiffly if anyone touches them. Unlike their Open counterparts, they give less wide-ranging, non-verbal feedback.

In contrast to Open people, Guarded types typically place higher priority on getting things done. They prefer working with things rather than working with people. Typical comments from a Guarded person include, “I can’t talk now, Frank,” or “I have a two o’clock deadline to meet,” or “I’ll let you know when I have time to do that.” or “I’ll get back to you later after I’ve had more time to think about it.”

The more Guarded types like structure; they like to know what to expect. Additionally, they prefer to have control over results within a structured environment. When negatively motivated, they can be viewed as coercive, restrictive or overbearing. They prefer to stick with an agenda... at least if it’s their own.

Because time equals money to Guarded individuals, they are more disciplined about how other people use their time. In part, this explains their tendency not to show, discuss, or willingly listen to thoughts and feelings to the extent Open people do. Guarded types are more matter-of-fact, with more fixed expectations of people and situations. Just as facts place second for Open people, feelings take the back seat for the more Guarded types. You might say that Open people tend to experience life by tuning in to the concerns or feeling states (of themselves and others) and then reacting to them. By contrast, Guarded people focus on the tasks or ideas in question and respond primarily to those stimuli.

Guarded people prefer to know where a conversation is heading. Idle, non-directed chitchat is uncomfortable for them. If Open types stray from the subject, Guarded people find a way to bring them back on track. They usually need clarity before they move on to the next topic. If you get off the subject, they are likely to ask, “Can you sum that up for me?” or “What is the key point you’re trying to make?”

Because of their different priorities, Guarded types often perceive Open people as wasting time and being indecisive. Conversely, Open types may view Guarded people as cold, unsympathetic, or self-involved. As a result, misunderstandings can quickly grow out of proportion when we do not discern and respond to the source of the differences... the inner motivating needs that drive our personal styles of behavior.

## Typical Behaviors

Open people often become physically and emotionally closer to people. During a conversation, they may almost stand on your toes. They are huggers, hand shakers, “touchers” and natural, easy smilers (never a forced grin). They are outgoing and develop deeper relationships with others.

Open folks are informal and enjoy quickly breaking down the walls of formality. They like to swap first names as soon as possible, and they prefer relaxed, warm relationships.

Open people enjoy free-flowing conversations. They can often be as interested in your brother-in-law’s surgery as they are in discussing the business on the formal agenda. Interaction within a conversation is more important than content to them.

Additionally, Open people dislike strict structuring of their time, and they rarely mind when other people take up a lot of their time. In fact, they often balk at imposed schedules and agendas and prefer to “go with the flow.”

Open types are feeling-oriented decision makers. They are in touch with their intuitions as well as the feelings of others. They come to their decisions through their interaction with others rather than only by their own cogitations.

In contrast, Guarded people do not readily show their emotions. They are more physically rigid and less expressive than their Open counterparts. Guarded people like to present an image of being in control and not flustered by other people or situations. If you were a stand-up comedian, you wouldn’t want an audience full of Guarded people. Like most of their emotions, their laughter is kept primarily on the inside.

Guarded people keep their distance, physically and psychologically. They are harder to get to know than Open types. They tend to remain aloof and value their privacy, especially in the beginning stages of a relationship. They arrange their offices to provide formal efficiency and a comfortable distance from visitors. With strangers, they prefer to keep everything on a professional, business level.

Guarded people are task-oriented. A conversation with a Guarded person will rarely stray from the topic that initiated the contact. They dislike interruptions from their agendas, unless they initiate the diversion.

Guarded people are fact-oriented decision makers. They respond to proof and hard evidence. In the workplace, they prefer to work alone and put less emphasis on opinions and feelings of others. On the surface, they appear to operate in an intellectual mode rather than an emotional mode.

Guarded people are champions of time and priorities management. They are the efficiency experts of the world, who create and follow rigid plans and schedules. They implore other people to respect their time and not to waste it.

Below is a list of Open and Guarded behaviors. Read each set of behavior descriptions on the list and check the one that most closely describes you. For example, are you more “relaxed, warm and animated” or more “formal and proper?” Check the one that describes you then do the same for each pair of descriptors. As with the previous checklist, remember that one is not “better” than the other is; it is simply a way of beginning to develop the skill of reading the behavioral style of yourself and others.

Check here if this behavior sounds most like you	“Open Behaviors”	or	“Guarded Behaviors”	Check here if this behavior sounds most like you
	I find it easy to share and discuss personal feelings with others.	or	I prefer to keep personal feelings private, sharing them only when necessary.	
	I prefer to socialize with others before getting tasks started.	or	I prefer getting tasks completed before socializing with others.	
	I tend to exhibit animated facial expressions during conversations with others.	or	I tend NOT to exhibit animated facial expressions during conversations with others.	
	I tend to get motivated when dealing with people on a daily basis.	or	I tend to get stressed when dealing with people on a daily basis.	
	I prefer to work with other people or in groups.	or	I prefer to work independently.	
	I am easy to approach in new social situations.	or	I am more standoffish in new social situations.	
	I am easy to get to know.	or	It takes time to get to know me.	
	I value feelings over facts.	or	I value facts over feelings.	
	I usually am NOT time disciplined.	or	I am mostly time disciplined.	
	Total “Open” checkmarks		Total “Guarded” checkmarks	

Now that you have completed both checklists, you can determine your behavioral style:

- If you rated yourself as “Open” and “Direct,” you are a Socializer.
- If you rated yourself as “Guarded” and “Direct,” you are a Director.
- If you rated yourself as “Indirect” and “Open,” you are a Relater.
- If you rated yourself as “Indirect” and “Guarded,” you are a Thinker.

Another way to verify the rating you gave yourself is by taking the online assessment at [www.PlatinumRuleGroup.com/assessment](http://www.PlatinumRuleGroup.com/assessment). This assessment is free and provides verification of your self-assessment. If they match, you may be well on your way to identifying your behavioral style, the first step to becoming a more successful salesperson.

## Reading the Styles of Customers, Employees, Partners (or Any Other Person)

We can best demonstrate the process of reading the style of another through a scenario of a salesperson preparing for a sales call. Remember, each new encounter, whether in person or over the phone, should begin with you seeking answers to the two basic questions that will help you get a sense of the other person's behavioral style. These answers shape how you should adapt to the style of that individual to increase rapport and improve your probability of making a sale. The two key questions you should try to answer as quickly as possible are:

- 1. Is this person more Direct or more Indirect?*
- 2. Is this person more Open or more Guarded?*

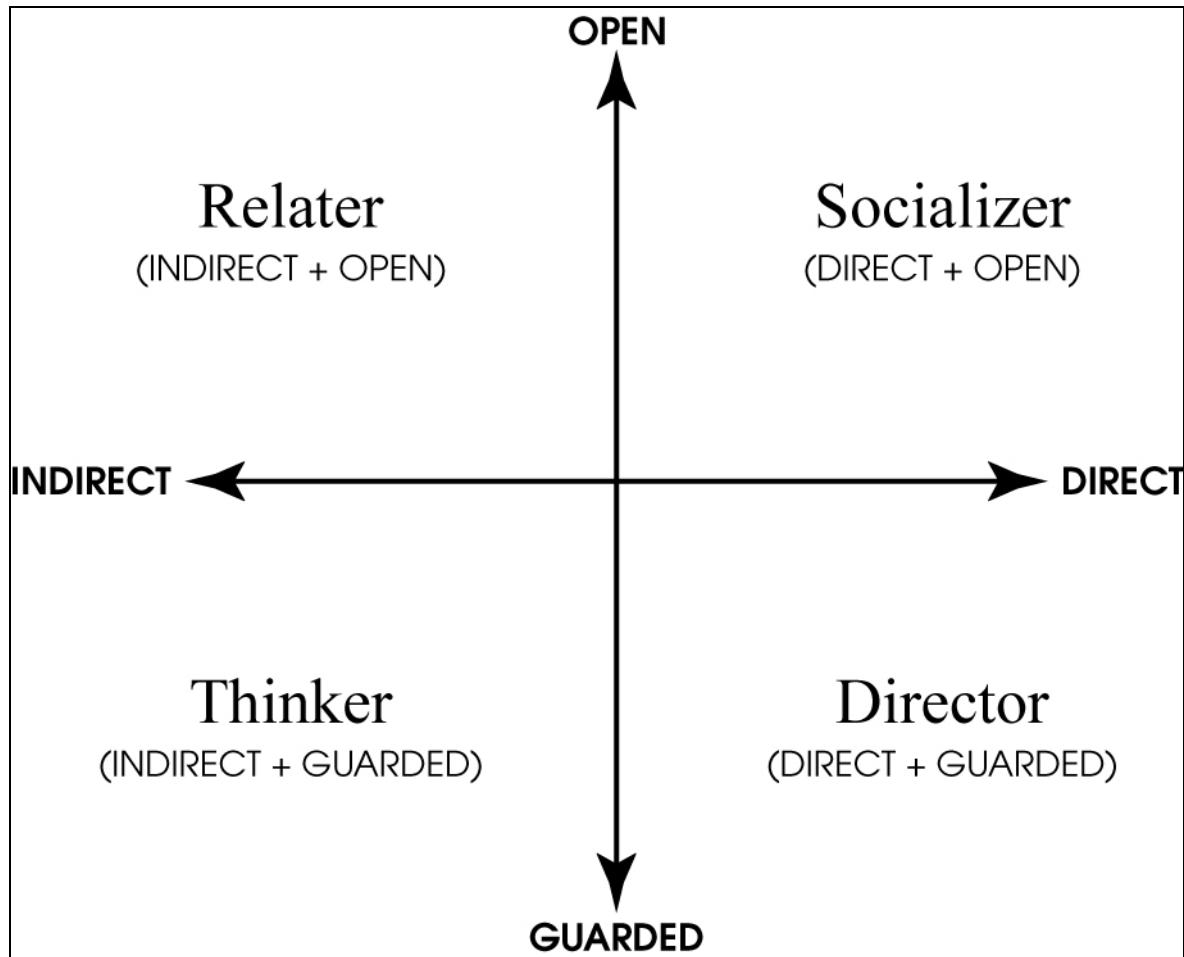
For instance, let's say you are getting ready to call on Sarah Jones, the general manager of Beta Corporation; a prospect for a new telephone system. You reflect back on your preliminary contacts with Ms. Jones (or conversations with those who know her) to see if you think she was Direct or Indirect. You review the continuum of clues to get a better picture of her preferences.

When you originally called Ms. Jones, her voice sounded impatient and rushed, and she talked rapidly. She quickly told you that she was satisfied with her present phone system, that it was budget season and she really didn't have time to meet with you. You requested just a couple of minutes to ask a few questions about her business and she impatiently agreed. During this exploration, you discovered that Beta Corporation is experiencing very rapid growth and Ms. Jones admits that she is not sure about the expansion capabilities of her present phone system. You offer to get the information for her and present it along with a description of your new, unlimited-expansion phone system. She agrees to meet with you for 15 minutes the following Wednesday at 11:15a.m.

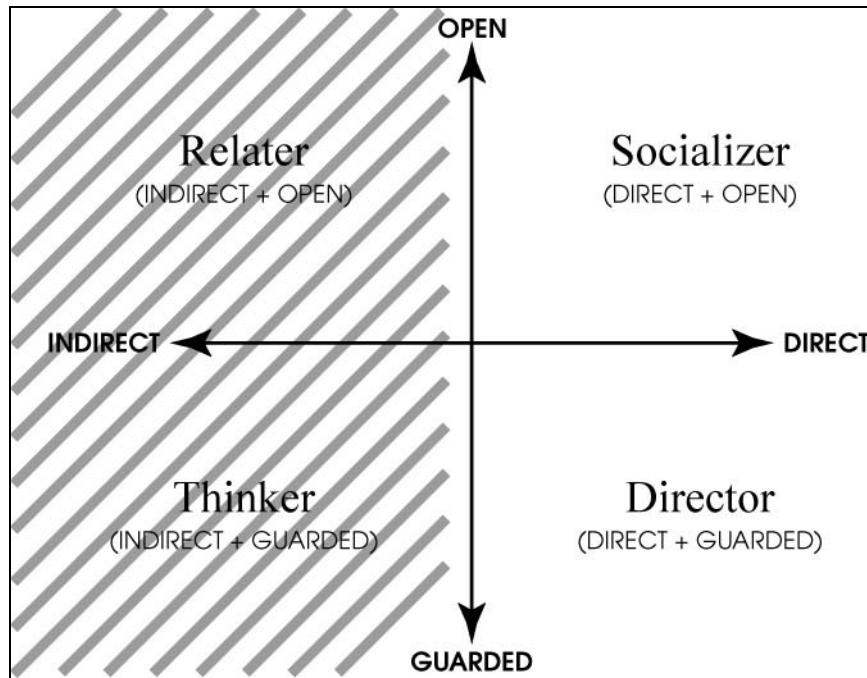
As you think through this meeting, you realize that Ms. Jones exhibited several "Direct" traits: she talked fast, quickly expressed her opinions, displayed impatience and quickly made a decision to listen to a brief presentation. Her continuum checklist may look similar to the one on the following page.

Check each behavior you noticed:	“Indirect Behaviors”	or	“Direct Behaviors”	Check each behavior you noticed:
	She appeared to be slower paced.	or	She appeared to be faster paced.	X
	She listened more than she talked.	or	She talked more than she listened.	
	She often made qualified statements: “According to my sources...” or, “I think in some cases...”	or	She often made emphatic statements: “This is so!” or, “I’m quite positive that...”	
	She appeared to be patient and/or cooperative.	or	She appeared to be impatient and/or competitive.	X
	She offered a weak handshake and looked away often during your conversation.	or	She offered a strong handshake and confidently maintained eye contact throughout the conversation.	X
	Her questions tended to be for clarification, support and/or to gain more information.	or	Her questions seemed to be rhetorical... to emphasize points or to challenge information.	
	She used very subdued hand gestures and spoke in a rather quiet, monotone voice.	or	She frequently used hand gestures and voice intonations while making points.	X
0	≡Total “Indirect” checkmarks		Total “Direct” checkmarks	4

You refer to the Platinum Grid (below) and reflect upon your observations.



Although a few items on the checklist could not be determined from your first meeting, you determine that your best bet in responding to her is as a Direct person. You would want to follow-up with further exploration on items such as Ms. Jones' approach to "risk" as part of the sales process. However, you have made the decision that Ms. Jones is Direct, and you have eliminated the two styles that fall on the left side of the Platinum Grid.



If Ms. Jones is Direct, then she must be either a Socializer or a Director. Again, you think through your conversation and review the description of the Open/Guarded continuum.

You realize that Ms. Jones was very task-oriented and spent little time on personal matters or chitchat. She seemed very formal, never suggesting you use her first name and was very concerned about the total time requirements of your appointment. Your Open/Guarded continuum checklist may look similar to this one:

Check each behavior you noticed:	“Open Behaviors”	or	“Guarded Behaviors”	Check each behavior you noticed:
	It seemed easy for her to share and discuss her personal feelings with you.	or	She preferred to keep her personal feelings private, sharing them only when necessary.	X
	She seemed comfortable socializing with you before getting down to business.	or	She got right down to business and made little effort to socialize.	X
	She exhibited animated facial expressions during the conversation.	or	She exhibited very little facial expression during the conversations.	X

	Her conversation often strayed from the subject at hand.	or	She focused the conversation on the relevant issues and stayed right on subject.	X
	She came across as warm and relaxed.	or	She came across as cool, formal and proper	
	She walked out to greet you; offering a warm handshake at a close distance.	or	Her greeting was "officious" (a quick handshake offered from a distance).	
	She didn't seem to notice the passing of time.	or	She seemed to keep a sharp eye on the time.	X
0	Total "Open" checkmarks		Total "Guarded" checkmarks	5

You decide that Ms. Jones is a Guarded type. As a result, when you combine her Direct style with her Guarded behavior pattern, this leads you to conclude that she is more likely to be a Director.

Let's try a different example: You call Sam Greenwood, the vice president of training of a large financial institution, to set up an appointment to discuss training software. Mr. Greenwood answers his own phone in a notably quiet voice. He talks in a soft, moderately paced voice and listens patiently as you explain who recommended that you call. After your introduction, he spends a minute or two talking about his friendship with the person who referred you. He asks you several questions about you (personally) and about your company. He addresses you by your first name. When you ask for an appointment, he says his schedule is flexible and he asks what time would be convenient for you.

Again using the process of elimination, you look at the descriptors of Direct/Indirect and decide that Mr. Greenwood's soft voice, patience and the amount of time he spent listening places him on the Indirect side of the dimension. That eliminates the behavioral styles on the right side of the quadrant: Socializer and Director. When you look at the Open/Guarded descriptions, you remember that Mr. Greenwood spent time talking about his friendship with the person who referred you, he seemed interested in getting to know more about you, he had a warm, friendly style, and he was flexible about setting up a meeting time convenient for you. You decide that he must be more Open than Guarded... which would make him a Relater.

## Typical Behaviors

To help you understand and remember these two dimensions, here is a brief quiz for each dimension. Try not to look at the answers below until you have answered the following questions. For each item, mark an X under the Direct or Indirect heading.

### Direct or Indirect?

	Indirect	Direct
1. Talks Fast .....	_____	or _____
2. Listens Carefully .....	_____	or _____
3. Firm Handshake .....	_____	or _____
4. Speaks Softly .....	_____	or _____
5. Uses Emphatic Gestures .....	_____	or _____
6. Asks Clarification Questions .....	_____	or _____
7. Longer Eye Contact .....	_____	or _____
8. Makes Tentative Statements .....	_____	or _____
9. Expresses Views Readily .....	_____	or _____
10. Waits to be Introduced .....	_____	or _____

(Answers to “Direct or Indirect?”: Odd numbers - Direct; Even numbers - Indirect)

### Open or Guarded?

	Open	Guarded
1. Animated Facial Expressions .....	_____	or _____
2. Expects Other to Arrive on Time .....	_____	or _____
3. Tells Stories and Anecdotes .....	_____	or _____
4. Conversations Focused on Tasks .....	_____	or _____
5. Shares Personal Feelings Easily .....	_____	or _____
6. More Formal, Proper Style and Dress ...	_____	or _____
7. Asks How You Feel About Things .....	_____	or _____
8. Poker-Faced, Does Not Smile Easily ....	_____	or _____
9. Comfortable with Touching .....	_____	or _____
10. Want to See Evidence .....	_____	or _____

(Answers to “Open or Guarded?”: Odd numbers - Open; Even numbers - Guarded)

Once you have made a preliminary assessment of the customer's behavioral style (by asking the two key questions of "Direct" or "Indirect" and "Open" or "Guarded"), you should factor in other behaviors and environmental clues to help you confirm your assessment of their behavior.

## Environmental Clues to Style

Once you have determined your customer's style (by observing his behaviors and manner of communication), you can look for environmental clues that may even further confirm your conclusion.

Look at your customer's office. How is it decorated and arranged? What items are on the desk? Is it messy, organized into neat piles or spotlessly clean? What types of things are on the walls and in their bookshelf? What seating arrangement does this customer seem to prefer and find most comfortable?

Environmental clues offer important information, but should not be used as the sole basis for determining one's style. In many situations, environment may be determined more by the culture of the organization than by your client. Looking for environmental clues is a way to enhance and corroborate the identification made by observing behavior. This observation also helps you glean clues about an organization's culture and style.

## Director Environments

A Director's desk is likely to be busy with paperwork, projects and material separated into organized piles. Both their in-baskets and out-baskets typically bulge with busywork. They also tend to surround themselves with trophies, awards, and other evidence of personal achievement. Everything about this office signals hustle, bustle, formality and power.

The Director's preferred power decoration generally includes a large chair behind a massive desk; providing separation from visitors. Walls often display plaques, degrees, awards and other evidence of success as well as large event calendars or project tracking charts. Any photos will probably be of them with dignitaries or celebrities that communicate their level of status or importance. If family photos are displayed, they are usually placed behind the Director, so they do not distract from business at hand. You might even find inspirational sayings such as, "If I do not find the road to success, I will build it myself!"

Directors are more formal and prefer to keep their distance physically and psychologically. They are sensitive about their personal space and do not like to have people get too close. The typical office arrangement is formal with seating that is face-to-face with a big "power desk" separating the Director from his visitors.

## Socializer Environments

Socializers respond to visual stimuli, so they like to have everything where they can see it. Consequently, their desks often look cluttered and disorganized and they may even pile paperwork and files across their desk and even onto the floor. A favorite motto of Socializers (usually taped to an almost buried in-basket) reads: "A Clean Desk is the Sign of a Sick Mind."

Their walls usually display awards and displays of their current interests. These might include motivational or upbeat slogans or posters, cartoons, drawings or quotations. You may see reminder notes posted and taped all over the place with little apparent forethought, rhyme or reason. Socializers, if asked, will

take great pride to explain to you all the things that are on their desk or on the wall because it gives them a chance to talk about themselves and their interests.

Typically, the preferred decor of the Socializer office would be an open, airy, lively atmosphere that represents the personality of its occupant. Likewise, the furniture arrangement indicates warmth, openness and contact. The Socializer does not like barriers such as a desk to separate him from others when he talks. Socializers prefer comfortable, accessible seating, enabling him to meet his goal of getting to know people better. A Socializer might pick the seat next to you at a table or on a couch, so he can see and hear you better and get a feel for the chemistry between you. Socializers talk a lot; with a Socializer's emotional nature showing in both his body language and speech. Since Socializers like touching and do not mind a slap on the back or a warm handshake, they often use an alternative seating arrangement to get physically closer to visitors. There is little danger of alienating Socializers by standing too close or picking up something on their desks.

## Thinker Environments

When you walk into an office that is free from clutter, neatly organized, and notice that the desk is clear except for one file, a phone and maybe a computer, you are likely to be in Thinker territory. Thinkers like neat, highly organized desks unimpeded by clutter. Everything in the Thinker's office has its rightful place... almost to the point of being preordained. In fact, if you work with a Thinker (and want to have a little fun), wait until they leave their office and then move one thing on their desk. Soon after returning, the Thinker will likely move the object back to its rightful place. However, with prospects and customers, never touch or move anything in the office of the Thinker.

The office walls of Thinkers contain their favorite types of artwork: charts, graphs, exhibits, models, credentials or more formal, job-related pictures.

Thinkers favor a functional decor that enables them to work more efficiently. They tend to keep most resources within reach... readily available whenever needed. However, they tend to keep their materials out of sight and usually locked up to protect their privacy. Where appropriate, you may notice more state-of-the-art technology than with other styles.

Thinkers are non-contact people who prefer the formality of distance. This preference is reflected in the functional arrangement of their desks and chairs, usually with the desks physically separating you from them. They are not natural huggers and touchers, and prefer a controlled handshake and brief visits or phone calls. Although they may not keep eye contact with you, do not interpret this to mean they are not interested in what you may be selling. Unemotional, disengaged behavior is common for those who are "Indirect" and "Guarded."

## Relater Environments

Relater's desks contain pictures of family and friends along with other personal items. Their office walls display conservatively framed personal slogans, family or group photos, serene pictures or mementos. They surround themselves with nostalgic memories of stabilizing experiences and relationships. These remembrances of a pleasant, uncomplicated past allow them to transform their offices into a warm, friendly cocoon that shields them from a fast-paced, ever-changing world.

They prefer to arrange seating in a side-by-side, more congenial, cooperative manner... no big, "power desks" for them! If they do have a big desk though, they will usually walk out from behind it to greet their visitors. Colors and furniture selections are generally conventional and conservative in tone.

In addition to family photos and pictures, you may find certificates recognizing the Relater for his volunteer hours for various hands-on activities in the community or business. While other behavioral types may prefer to contribute money, Relaters typically enjoy giving their time for causes they feel strongly about. Not only does this satisfy their need to give, it provides them an opportunity to meet more potential friends and to see what is going on behind the scenes.

Take a moment to review what you have read about the office environments of the four styles and write up to four items that distinguish the office of each style.

## Environmental Clues at a Glance:

Relater's Office	Socializer's Office
1.	1.
2.	2.
3.	3.
4.	4.
Thinker's Office	Director's Office
1.	1.
2.	2.
3.	3.
4.	4.

### Style Identification by Letter, Email or Phone

Sometimes you do not get a chance to see your client in person and contact may be limited to an email, phone conversation or a letter. Even these limited communications can offer you clues to the customer's style.

### Director's Emails, Letters and Memos

A Director's correspondence tends to be brief and to the point. They may mention highlights of conversations or materials, but they do not detail them unless necessary. They generally include specifics for your follow-through or raise questions they want answers to... **now!** Even notes and cards take on abbreviated forms and with little or no strong feelings and/or tone expressed.

### Socializer's Emails, Letters and Memos

Look for exclamation points, underlining and bold highlighting. If it's an email, you might find unusual fonts, several colors and graphics. In their text, you can almost hear the Socializer emphasizing those emotion-laden, picturesque adjectives and adverbs. Socializers write in the same stimulating, energetic way that they speak. Socializers' letters often include personal anecdotes or references to shared experiences. Socializers are famous for their postscripts and might even include a "P.P.S.: \_\_\_\_\_"

### Thinker's Emails, Letters and Memos

Thinkers send letters that seek to clarify positions and address processes. Consequently, they may become rather long and filled with information and questions, while at the same time being somewhat indirect and intentionally obtuse. A second type of Thinker letter is a short communiqué with an accompanying host of enclosures, citations or references. The purpose of their letters is to process information in ways that maintain or enhance their position.

## Relater's Emails, Letters and Memos

Relaters send letters to update people or keep in touch and let you know they're thinking of you. Relaters like to send thank you notes for almost anything: inviting them to an office party, bringing lunch back for them or including them on a company function. They may even send a thank you note to acknowledge your thank you note. You can count on holiday season cards from them every year as long as you remain on their "relationship" list.

## On the Phone with a Director

Again, the Director prefers to be brief and get right to the point... especially when it's their time or your agenda! They may start the conversation with whatever they are focused on... with no personal acknowledgement or greeting. They often speak in a sort of shorthand – concisely or at least pointedly – and sound cool, confident and demanding. Their phone calls sometimes sound like human telegrams. They tend to speak loudly, rapidly and emphatically... and view phones as task command devices. Because they are not the best at active listening, you may get the sense that they are not hearing what you are saying. However, be sure to measure what you say, as they may later replay the conversation later in their head. Additionally, if something seemed amiss about what you said it could shake their confidence in you and cost you a sale.

## On the Phone with a Socializer

"What's up?" "What's happening?" or "How's it going?" are common Socializer opening lines. Their animation and gestures come straight through the phone line as if they're in the room with you. Socializers love the phone and recharge their batteries by talking to others. They speak rapidly with a lot of emphasis and emotion; they can talk longer and better than the other styles. When calling you from a shaky cell phone connection, they may talk for two or three minutes before they even realize the call was dropped. For them, phones are instant "airlines" for transporting them anywhere and anytime for a visit with others.

## On the Phone with a Thinker

The Thinker is formal, time-conscious and uses the phone as a tool to process tasks whenever necessary. They prefer brief, to-the-point telephone calls. Thinkers tend to express themselves in a rather tentative manner and display caution in making commitments in phone conversations. Thinkers speak in a careful, soft manner with non-emotional delivery. While the phone does give them the option to avoid face-to-face involvement, they may perceive unscheduled phone calls as an invasion of their privacy, time and/or a disruption from their work.

## On the Phone with a Relater

Relaters greet people warmly on the phone, asking, "How are you?" and expressing pleasure at hearing from you. They immediately put you on a first-name basis and patiently listen to your ideas and feelings. Relaters talk more slowly and quietly with a steady, even-tempered delivery. They enjoy listening, since it affords them another avenue to best understand and respond to others; the phone is a valued tool for Relaters.

## Wrapping up...

Environmental clues will help you confirm your style identification of the people around you: clients, co-workers, friends and family. Once you are comfortable that you understand their style, you can begin to

communicate with them on their own wavelength ... in their own style. The next section explains two fundamental adjustments you can make to improve your communication with anyone you meet. It also provides you with strategies for improving your effectiveness with your customers at each step of the sales process.

### End-of-Section Activities

By now, you are ready to think about the people you know and identify their behavioral style. Using the same process of elimination, first decide whether the person is more “Direct or Indirect,” and whether they are more “Open” or “Guarded.”

Following this paragraph is a worksheet designed to help you read the behavioral styles of others. Begin by considering the behaviors of some of the key people in your life. First, think of two co-workers (one you get along with and one you do not) to see if the reason may be due to your similar or conflicting styles. Do the same for three customers: think of one you have sold to successfully in the past, one you could not sell no matter how hard you tried, and the third one you are currently trying to sell. Finally, assess your “significant other” and some of your friends. As before, you might pick a best friend, a casual friend and a friendship or relationship that has deteriorated or ended.

<b>Person</b>		<b>(DIRECT or INDIRECT) &amp; (OPEN or GUARDED)</b>							
		<b>D</b>	<b>I</b>	<b>O</b>	<b>G</b>	Director (D+G)	Socializer (D+O)	Thinker (I+G)	Relater (I+O)
<b>Co-worker 1</b>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____
<b>Co-worker 2</b>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____
<b>Key Cust 1</b>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____
<b>Key Cust 2</b>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____
<b>Key Cust 3</b>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____
<b>Spouse</b>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____
<b>Friend 1</b>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____
<b>Friend 2</b>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____
<b>Others</b>		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	_____	_____	_____	_____

Now that you have completed the worksheet, stop and reflect about some lessons that life was trying to teach you. The ability to learn from your own mistakes and experiences is a skill that will help you grow in all aspects of your life!

**Reflection Questions:**

- *Given your behavioral style, why do you think that you get along with certain employees and not others?*
- *Why did you connect with (and make sales to) certain customers, but not others?*
- *What insights have you gained about why you clash and/or harmonize with your spouse and specific relatives and/or family members?*

Each of the four behavioral styles sees the world differently, and until you can read and adapt to the styles of others, you will not reach the status of an extraordinary businessperson. However, the fact that you are reading this book indicates that you will never again be clueless as to why you sometimes make sales and other times lose them, or sometimes motivate your team and other times de-motivate them (because of an inability to read people).

In the next section of the book, you will learn how to adapt your behavior to connect with each of the four styles to reduce tension and build rapport... leading to more sales, greater harmony, improved teamwork, and ultimately, greater success in business and life.

## Section III - *Adapting Your Style*

***“Knowledge without application is useless.”***

We have all heard that age-old axiom, but it is true. Understanding your natural behavioral style and learning to recognize another person's style is a good start to business success, but unless you are willing and able to adapt, you have gained nothing. This section will teach you how to make adjustments in your approach to others to reduce tension and engender trust.

## Chapter Six - Reducing Tension... *Through Style Adaptability*

Relationship tension is the normal tension that exists between two interacting people. The tension can be either constructive or destructive, but it is always present. Tension is caused by the differences in the way people perceive and manage themselves and others, preferences for closeness and self-disclosure, and other fascinating nuances of personal style. Since you now know that one of the key underlying factors of tension is due to the differences in behavioral styles, this section of the book will help you learn how to adapt your style with each of the four distinct behavioral styles to reduce tension. As a result, you will get along better with others, enjoy more positive interactions and increase your business success!

### Tension and Productivity

The relationship between personal tension and productivity has been the focus of many theories. People function best within a range of tension that has become known as the “comfort zone.” If tension is too low, there is little motivation to produce. Conversely, if tension is too high, it turns into counterproductive stress. Between the two extremes is one’s comfort zone... the area of optimal productivity. The level of tension that creates this comfort zone is different for everyone.

Everything you do to help your customers and your employees stay in their individual comfort zones enhances your relationship, leading to greater success. Everything you do to take your customers or employees out of that comfort zone erodes the relationship, which will impede your success. Students of The Platinum Rule are constantly managing the tension level between themselves and the people around them, thereby enhancing their personal effectiveness and achievement.

### Pace and Priority

Two primary areas of difference that cause a lot of tension and/or static are: *pace* and *priority*. **Pace** is a person’s operating speed. Some people prefer a faster, high-energy pace while others prefer to operate more slowly. **Priority** is what the person sees as most important, their natural inner goal or drive; a natural focus on either the tasks and results or relationships and feelings.

You may remember that a primary quality that distinguishes Direct from Indirect people is their pace. Direct people tend to move, think, talk and make decisions rapidly, whereas Indirect people move more slowly.

Also, another major factor that differentiates Open and Guarded people is their priorities. Open people tend to place a higher priority on relationships while Guarded people view the task as the more important priority. Each style has a unique set of priorities involving the type of relationship or task aspects of a situation that are more important to them, and each has its own pace in terms of how fast things should be done. For some, their expectation is, “I want it yesterday,” For others, “sooner or later” is acceptable. The next chapter will help you develop specific strategies for adjusting your pace and priority to meet the needs of other people within all of your relationships.

### Behavioral Adaptability

The willingness to develop and demonstrate behaviors not necessarily the characteristic of your natural style, for the benefit of every relationship, is called “**behavioral adaptability**”. This type of flexibility is something applied more to you (to your patterns, attitudes and habits) than to others. Behavioral adaptability involves making intentional adjustments to your methods of communicating and behaving, based on the particular needs of the relationship at a particular moment in time.

***Behavioral adaptability is the key to successfully communicating your ideas to people of every style.***  
As you continue to develop more adaptability, you will more effectively interact with each person in the way he or she likes to communicate, learn and make purchases.

Adapting your behavioral style is a big change, and big changes take time. Here is a simple test: move an appliance you use every day (toaster, coffee maker, electric razor, etc...) before going to bed. Quite likely, when you wake up in the morning and go to make toast, coffee or shave, you will automatically go to where the appliance used to be as opposed to its new location. The point we are making is that old habits are hard to break, but breaking some habits is absolutely worth the effort!

It's not easy to break the old habit of “selling the way you buy.” Every day in business, you are “selling” – whether it's through actual sales calls to customers, or by selling your ideas to your employees or board members. You need to learn to “sell” to people based on their style, which means learning to alter your sales strategies and techniques to fit the four different “buying” styles.

To date, you have been interacting with other people in a way that works (take out quotation marks) for you. Feedback from your parents, siblings, relatives, teachers and friends has shaped your psyche. You will require practice and focus to “unlearn” reflexive communication modes and to develop new reactions to situations and people.

The beauty of The Platinum Rule is that unlike traditional training, you learn more than just techniques. (take out quotation marks) You will learn to read the behavioral styles of others and adjust your style to one that best fits their style. For example, if you are a jokester or storyteller (Socializer), you will learn when and how to use your natural gifts at a more appropriate time to get the results you want. Additionally, you can also learn how to use your agile, creative mind to ask better questions of your customers and employees to gain valuable information and/or cement your relationship.

The first few times you consciously adapt your style to mesh with others, it will feel awkward. Like trying anything new for the first time, it takes practice. However, the day will come when you effortlessly read the style of others and adapt your selling style to match every customer's and employee's unique style. You will adapt your counseling style to engender trust. You will adapt your leadership style to inspire action. When you begin to unconsciously read and react to the styles of others, this will be the magic moment when you begin to directly benefit from increased sales and better teamwork, and indirectly benefit (which may be even more important) by having a better relationship with your employees, colleagues, spouse, children, relatives and friends.

No one style is naturally more adaptable than another. For a given situation, the appropriate adjustments that people of each behavioral style make will vary. The decision to employ specific behaviors is made on a case-by-case, situational basis. For instance, you may have to be flexible with one person and less flexible with another. You may want to be quite flexible with one person today and less flexible with that same individual tomorrow. Behavioral adaptability concerns the way you manage your communication and action strategies.

For example, when a Socializer meets with a Thinker, one of the ways the Socializer can practice behavioral adaptability is by talking less, listening more and focusing on the key facts. This is not being

phony or manipulative; it simply means that the Socializer makes an effort to put the Thinker's priorities ahead of his own, knowing that both their needs will eventually be met.

Adaptability does **not** mean imitating or "mirroring" the other person's behavioral style. It does mean adjusting your Directness/Indirectness and Openness/Guardedness (your pace and priority) with the other person in ways that lead to synergy and better outcomes for both of you. It means you can make these adjustments while still maintaining your own identity, ideas and good business sense.

Adaptability is important to successful relationships of all kinds. People may display a different style to meet the requirements of their professional roles than they may prefer in their social or personal lives. It is interesting to observe that people tend to be more adaptable at work with people they know less; and, by contrast, less adaptable at home with people they know better.

Of course, adaptation at its extreme could make you appear "wishy-washy," or even two-faced... a proverbial jellyfish. A person who maintains high adaptability in all situations would have difficulty coping with stress or realistic requirements for efficiency. There is also the danger of developing tension from the stress of remaining in a "foreign" style permanently... rather than as a temporary, more situational response. At the other end of the continuum, little or no behavioral adaptability will cause others to view someone as a rigid and uncompromising "robot" because they insist on behaving only according to their own natural pace and priority.

High adaptors meet the needs of others (in addition to their own needs). Through attention and practice, they are able to achieve a balance: intentionally using their flexibility by recognizing when a modest accommodation is appropriate, or when the nature of the situation calls for them to adapt totally to the other person's behavioral style. A skilled adaptor knows how to negotiate relationships in a way that allows everyone to win. They are tactful, reasonable, understanding and non-judgmental.

Your adaptive level influences how others judge their relationship with you. When you raise your adaptive level, both trust and credibility will go up; lower your level, and trust and credibility go down. Adaptability enables you to interact more productively with difficult people and helps you to best respond to tense or complex situations. By adapting, you are truly practicing the **Platinum Rule** by treating other people the way they (Underline) want to be treated.

## Traits of High Adaptors

The ability to become skillfully adaptive in our relationships with others requires a diverse set of personal attitudes and strengths... in addition to a well-developed set of mental and emotional abilities.

### Higher adaptability may be characterized by the following types of personal attitudes:

- **Confidence:** the attitude of belief in one's self, trusting your own judgment and resourcefulness
- **Tolerance:** open-minded state of acceptance; willingness to defer judgment on the basis of limited time, information, or experiences
- **Empathy:** sensitivity to another's point of view; caring approach towards others (without being overwhelmed or manipulated by people)
- **Positive attitude:** maintaining a state of positive expectations about people and situations, including a positive state of energy in your thoughts and emotional patterns
- **Respect for others:** desire to understand, accept, and consider both mutual and separate interests, choices and commitments
- **Cooperation:** the desire to work with people to develop win-win results

- **Approachable:** open to discussions of events, ideas and feelings with others

**The aptitudes that characterize a high adaptor include:**

- **Resilience:** learning how to cope in spite of setbacks, barriers, or limited resources; willingness to continue practicing, growing and learning
- **Vision:** foresight, creativity, and imagination
- **Attentiveness:** being mindful and aware of stimuli in the environment; reality-focused to conditions, events, and patterns
- **Competence:** capability of managing required tasks and being knowledgeable about required subjects and people; including use and updating of appropriate abilities
- **Self-correction:** able to initiate and evaluate your own behaviors, seeking feedback as appropriate; characterized by a problem-solving mindset and approach to matters
- **Objectiveness:** the ability to deal with facts and make decisions on a logical, rational basis
- **Tactfulness:** being able to give people feedback in a kind, gentle manner

The highly adaptive person generally has a solid sense of security and a more fully developed sense of personal worth or well-being. The highly adaptive person is open-minded and has a searching attitude in dealing with people and situations. Flexible people generally have positive expectations about both their own goals and desired results, and those of others. They seldom react to people, conditions, or events out of fear or anxiety. Besides, the consummate Platinum Rule Business Owner is not one who blindly formulates and adapts a leadership style based on poor role models from the past— for example, aggressive, pushy, , hard to trust – but instead learns to lead in a way that makes perfect business sense.

The good news is that anyone can become more adaptive, but it will take a dedicated, conscious effort to develop the skills. For most of us, flexibility involves learning new techniques and developing new habits. It takes personal commitment to develop the traits and aptitudes necessary for success. It also takes occasional review and feedback to see how well you are doing at developing the adaptive proficiencies you desire.

# Section IV - Putting The Platinum Rule in Practice Within Your Business

## *The 12 Principles of Business Mastery*

Every business leader has strengths and weaknesses. Your ability to recognize and build on your strengths will mitigate your weaknesses. This is a critical component to success in business as well as in life. In this section, we will discuss how to implement what you learned thus far. We will discuss specific actions you can take to transform your business into a self-sustaining machine that becomes a slave to your personal goals.

## Chapter Seven

### Strategies for Leveraging *The Platinum Rule* *Building a Strong Business 12 Ways*

#### Introducing the Twelve Principles of Small Business Mastery

How do small companies become successful?

Despite the bad news we often hear about businesses struggling and/or failing, we also found some encouraging news. After interviewing successful business owners and working with emerging small companies, we discovered several common trends.

Successful business owners ensured proper attention was given to the following 12 areas:

1. Culture
2. Customer Service
3. Attitude
4. Business Strategy
5. Discipline
6. Risk
7. Finance and Budget
8. Business Predictability
9. Information Technology
10. Marketing
11. Sales
12. Training

Every successful business owner understands how to identify and use employee's talents (and their own!) to propagate success throughout their organizations. Yet very few business owners bolster strengths and overcome weaknesses with the conscious knowledge of what they're actually doing or why. They seem to do it by "feel" or gut instinct. **The Platinum Rule** teaches us how to consciously recognize our own natural strengths and weaknesses, how to spot them in others and how to speak to employees in a manner that inspires them, motivates them, reduces tension and increases cooperation.

If you already have a thorough understanding of *The Platinum Rule* then you can proceed with this section of the book.

*If you are not intimately familiar with The Platinum Rule, please start at the beginning of the book to get a solid understanding of behavioral styles before moving forward with this section! You could implement The 12 Principles without using The Platinum Rule, but you would never understand why you are succeeding or struggling with each principle (without knowing why your natural behavior style was working for you or against you).*

The twelve principles are listed in random order; although each principle is an essential ingredient in the formula for creating a successful business. Depending upon where you are in your business development process, you might want to change how you approach many of these principles. Everything comes down to your

behavioral style, your natural gifts, where you enjoy focusing your energies and how much you are willing to submit to discipline.

If you are a budding entrepreneur, pay particular attention to Attitude, Behavior Style (the first section of this book), Business Strategy, Sales, Marketing, and Finance / Budget. These six ingredients are essential to nearly every small business.

For budding entrepreneurs (and new business startups) the order of the six principles is important. The Attitude of the business owner is critical to the overall success of the entire enterprise. Attitudes affect the goal setting process and the direction the owner steers the business.

The second principle is the Behavior Style of the owner. This allows for an assessment of your strengths and weaknesses. The Business Strategy is used to craft both well-thought process and plan to accomplish the goals of the business owner. Integrating mastery of The Platinum Rule enables you to build on your natural strengths while minimizing your weaknesses.

The last three principles: Marketing, Sales and Finance / Budget address how to market your product or service and how to price/sell; all the while providing a basic understanding of the financial requirements for sustaining and building your business.

**We want you to read this book in one of two ways:** First, you may read it from cover-to-cover and do the exercises. The exercises will give you insight into areas of your business that require the most attention. The second way is to focus on the specific principles that you know you need to work on. The second method offers a shortcut for those of you who have already mastered the basics of *The Platinum Rule*.

Let's begin with a brief outcome-based description of the twelve principles.

## Principles of a Successful Company

By carefully studying companies nominated for the annual "*Celebrating Success! Northeast Ohio's Business Conference*," we were able to pinpoint 12 key principles that were fundamental to their success. These principles were then tested with our clients to confirm their effectiveness.

These lessons have been broken down into 12 action steps that companies used to achieve success. Not all companies actively implemented all 12 principles; some companies utilized only a few, while others implemented all of them. These principles are highly interrelated, and break down loosely into "softer" skills: company culture, customer service, work/life balance, discipline, attitude and risk-taking; and "hard" skills: business strategy, financial & budget, business processes, information technology, marketing, sales and training.

Each principle could be compressed further but a choice was made to keep them separate. This allowed for a more detailed explanation on topics. Depending on the company, the order and level of influence of each attribute varied widely. We will explore each attribute in detail later. Below is a brief summary of each principle.

**Culture** is defined as the "integrated pattern of human knowledge, belief and behavior that depends upon people's capacity for learning and transmitting knowledge to succeeding generations."

Many business owners discussed how hiring the right person was critical and what behaviors they looked for when hiring a new employee. No one specifically used the word "culture," but what these employers wanted were people who fit into their corporate culture or who would help shape the culture they envisioned.

Simply stated, successful companies wanted to hire employees who expressed a certain attitude or behavior that would make their business more successful; immediately and long-term. A company's culture was reflected in their attitude on work/life balance, risk taking, customer service and training.

The type of culture that a company will create depends in large part on the behavioral style of the business owner. Socializers seek a different type of environment than a Thinker or Relater. Thinkers and Relaters will want a culture that reflects security and stability. Socializers will want a culture that embraces spontaneity and fun. Directors will embrace a culture that rewards action and results.

Each company we profiled realized the importance of **Customer Service**. However, "customer service" means different things to different people, so let's define it. A customer is defined as "one who purchases a commodity or service." Service is defined as "the occupation or function of one who serves." Together they mean providing service to one who buys your product or service. The concept is simple but the implications and implementations can be quite complex.

Many companies integrate customer service into their culture through training and the design (and frequent redesign) of relevant business processes. In most cases, the business plan dictates how they provide customer service. Once the service level and approach are defined, modifying the business to support the strategy is a relatively easy process.

The type of customer service provided is a direct result of the behavior style of the decision-maker, as well as how each strives to address customer's needs. A Relater will create one type of customer service function. This would look very different from what a Director (or Thinkers or Socializers) would create.

**Discipline** is a decisive element for all successful companies. Discipline is also referred to as "focus," "staying the course," or "sticking to their core products and markets." No matter how you describe it or what you call it, it's still discipline. Discipline can be defined as "control gained by enforcing obedience, or order, or to impose order." Maintaining discipline was impossible if the management team did not define a plan and a strategy that the company could follow. For example, Directors have a much easier time remaining disciplined than Socializers do.

The **Attitude** of key managers (the president, owner or business leader) is one of the most important principles defined. Attitude is defined as "the mental position with regard to a fact or state or a feeling or emotion toward a fact or state." Stated plainly, attitude is the way members of management looks at themselves, their company, their employees, their products (or services) and their customers. Many of the organizations we consult with strongly reflect the attitude of the company president. The president knows if and when change is necessary and understands that change "starts at the top."

Because Attitude is truly contagious, we discuss it separately, as its own attribute. The attitude of the leader clearly contributes to the corporate culture; all else flows from this culture ... he (or she) sets the tone. Each of the four behavior styles has a clearly definable attitude. Directors are motivated by results. Socializers are more impulsive. Thinkers are usually very methodical and detail-focused while Relaters tend to be more collaborative.

Each of these individuals (and their companies) takes **Risks**. Most are calculated risks with clear outcomes in mind. Many business owners bet their livelihood on their company succeeding and most realize they need to change as economic climates shift. Each knows it is disastrous *not* to embrace change. Successful leaders understand that being in business is about managing and responding to change. Companies that succeed embrace change and respond to challenges presented by the market, competition or changes in general business

conditions. Many owners try (and are successful) to create a culture of ... *change*. All of the companies that actually made significant changes in their organizations, without exception, wished they had made the change sooner.

Socializers are sometimes impulsive and often fail to evaluate risks very closely. Thinkers can over-analyze the problems and may not respond at all to the risk, change or opportunity identified. Thinkers want to know how *everything* will work before they make a decision. But once the decision is made, they feel comfortable with the chosen path. Relaters often wait until everyone understands the risks and everyone agrees on the course of action. Directors tend to make change happen, but do not always take the time to listen to the ideas of others, nor do they invest enough time communicating the “whys” and “hows” of change to their staff.

The single most critical element identified is the development and implementation of a sound **Business Strategy or Plan**. Although they are not the same, for our purposes, we use the words “strategy” and “plan” interchangeably. We reason that for every strategy, there is an implementation plan and often the implementation is defined within the strategic framework. The strategy could include product development philosophies and approaches, financial goals, and market-orientation with customer-facing strategies. The plan is the implementation of the strategy.

Without exception, it would have been very difficult for the companies we scrutinized to identify new opportunities (and to capitalize on) them without a strategy that identifies the basic elements of the business and its overall direction.

Of the four behavioral styles, Thinkers are most inclined to create and implement a strategy. Socializers tend to avoid it; Directors will do it (but not write it down and/or ignore it when it may stall forward movement); Relaters take a long time to get started, and then seek input from everyone before moving forward.

An important principle is the creation of a **Financial Roadmap and Budget** and the discipline to follow it. This plan reminds owners where and how to spend money, and it provides ways to measure progress or shortfalls. Finance is the cornerstone of good business plans. Directors are the first to ignore the financial roadmap if they think they can get better results by “navigating creatively.” Thinkers most always follow the plan. Their thought process is: “Why create a plan and not use it?” Socializers rarely create a plan, and if they do, they often forget about it as soon as it is completed. Relaters tend to follow a path similar to that of Thinkers, but they usually collaborate with experts (or just about anyone else they feel comfortable with) to verify opinions; they also tend to set their goals too low.

Another frequently mentioned attribute of success is the streamlining of **Business Processes**. We call this *creating predictability*. This is probably the least understood principle by business owners. The intention here is to *increase productivity and reduce costs while getting the same (or better) outcomes for customers*. Processes define are how things are done within a business. Every company has some processes; some are clearly defined, others are implicit. Each of the companies we interviewed discussed the need to improve and review (often) its business processes: to become more efficient and productive, and to respond to market changes faster while providing better service to customers.

*Business predictability* occurs when a company determines what it does best and creates (and implements, monitors and adjusts) processes that ensure that regular activities occur the same way (measurable and repeatable). When a process is followed correctly, businesses can run without intervention, thus enabling the management team to focus on projects that are more meaningful. These long-range projects may include planning, strategizing and market research.

Thinkers are most likely to embrace predictability because this approach requires planning and discipline. Directors just want it done, and Socializers typically lack the discipline to follow through. Relaters like the thought of predictability; it allows them to get comfortable and learn a routine. Once the process is defined and implemented, Relaters know what is expected of them. Relaters find comfort in consistency and predictability, even if the process is poorly implemented.

The next attribute is interesting because we find it within nearly every aspect of operations: the use of **Information Technology**. While technology is important, it is apparent that technology does not have to be complex to be effective. Technology is probably the most important enabler for change that a company can introduce. Each of the four behavioral styles has different expectations of technology, and how it can impact the business.

**Marketing** is a nebulous term; it has different meanings for different people. Effective marketing performs different functions around specific selling environments. For example, business-to-consumer enterprises have completely different marketing needs than business-to-business companies.

Generic marketing (or traditional advertising) could help certain businesses to deepen branding and/or top-of-mind-awareness of the company, products and/or services.

One-to-one marketing supports the necessary relationship-building activities to sell “invisible” services.

In high-dollar, business-to-business selling environments, marketing automation often supports long-cycle selling. Other companies invest significant time and energy in building a distribution channel. Still others focus on niche markets and attack specific targets with consistency, commitment and diligence. To learn more on marketing please see the authors’ book 49 Marketing Secrets (THAT WORK) to Grow Sales ([www.49marketingsecrets.com](http://www.49marketingsecrets.com).)

Every company’s approach to **Sales** is different. Some depend on building referral partnerships and strategic alliances, and this is the extent of their sales process. Others aggressively attack the market with direct mail campaigns, cold calls and other forms of direct customer contact. The specific selling approach is usually defined by the marketing plan. Successful owners know that the concept of selling is a process that can be measured and improved, like all business processes. They talk about the importance of having a consistent, measurable and repeatable sales process, and they engage professional sales trainers (with flexibility to customize training to their selling environment) to help create consistency within their selling process.

Different behavioral styles have natural strengths in different types of selling environments. Directors are great at lead generation, cold calling and selling short-cycle products where the benefits of buying are realized quickly. Socializers are phenomenal at networking and starting new relationships. Relaters excel in customer service and inside sales where strong listening skills are needed. Thinkers do well in long-cycle, high-dollar, technical sales where building and maintaining credibility over a long period of time pay off.

**Training** can be defined as “to form by instruction, discipline, or drill and to teach to make fit, qualified, or proficient.” Because we live in world of continuous change, it is more important than ever to implement a culture of continuous learning. For many successful owners, continual investment in training is a major attribute identified. Later, we will discuss how training is best leveraged and implemented, and how it supports the business strategy.

Training can get a little tricky with the four different behavioral styles. Thinkers prefer a typical classroom approach with a syllabus, systematic instructions and exercises to test knowledge. Directors are more inclined to learn kinesthetically, by actually doing something. It’s hard for Directors to sit in class for long

periods; they just want to apply new concepts, and if they have a problem, they want to get their questions answered as efficiently as possible. Socializers like learning to be interactive and fun; they need games or group exercises to hold their attention. Socializers don't have a strong interest in details, but they quickly see applications and patterns, and they generate new ideas. It would be best to avoid details while training Socializers; just get them involved quickly and allow time for them to discuss what they are learning. Relaters like working in teams and function better in a small group environment. They learn well from each other and encourage others to learn as well.

Now let's look in some detail at each of these principles. In each of the following sections, we will discuss one specific attribute. You will learn how the natural strengths and weaknesses of business leaders of each behavior style will help—or hinder—business owners as they work toward mastering each attribute.

At the end of each section, you will find questions to test your understanding and to help you incorporate each specific attribute into your business. Your organization may be doing quite well in a specific area and may not know it. In other areas, you may need to make improvements. These questions will help facilitate your understanding of each attribute and the effectiveness of implementing a specific attribute within your organization.

**Culture Helps Ensure Business Success from One Generation to the Next!****Creating a Company Culture**

In this section, we discuss the importance of a company culture and then move into the types of culture the four different behavioral types commonly manifest. We will make suggestions to help each behavioral style create and implement the culture most suitable for each specific behavioral style.

As mentioned earlier, a company culture is defined as the “integrated pattern of human knowledge, belief and behavior that depends upon man's capacity for learning and transmitting knowledge to succeeding generations.”

Owners looking to create a culture need to answer one question: “How do I get my employees to express a certain attitude or behavior that will make my business successful, both today and in the future?” This is important because once the correct behaviors have been defined then processes can be created to drive the required behaviors. Once the processes are defined, then systems should be implemented to ensure the behaviors are measured and repeated as required. Areas where attitudes and behaviors are expressed manifest in a company’s approach to work/life balance, risk taking, customer service and training.

Healthy companies have leaders that know how important creating and sustaining culture is for the success of their business. Not all of the companies specifically mentioned the word “culture,” but all of them tried to create specific outcomes based on the programs they implement and the people they hire.

Each of the quotes mentioned below are from successful business owners who know the importance of hiring the right people and the difference it makes in their business. Hiring the right person can be defined as finding someone who has the correct skill set, the right attitude and the ability to fit into the company’s culture. These quotes are from companies interviewed from the ***Celebrating Success! NEO Business Conference (formerly the Greater Akron Business Conference)*** <http://www.neobusinessconference.org>.

*“Never underestimate the value and need for hiring and retaining the best employees.”*

*“Build confidence in your clients, your people, your business partners and yourself.”*

*“Surround yourself with good people and employ a team concept.”*

*“Hire as many smart people as you can afford.”*

*“Good personnel hires led to additional good hires; getting the right people ‘on the bus’ makes all the difference.”*

*“Provide a clear understanding of the company values and define the culture as soon as possible.”*

*“Look for applicants with a good attitude, natural intelligence and a willingness to learn.”*

*“Both the company and employees can benefit when the culture is built on trust and caring.”*

*“Employees learned how far the company and its management team would go to keep good workers. A testimony to the success of a company is the focus on their people; this can be measured by the average tenure of the employees.”*

### **A Case Study in Creating a Company Culture—Title Company**

**(In our case studies, many company and individual names have been changed)**

ABC Title focuses on creating a specific culture and on hiring employees who are totally in accord with the existing culture. ABC Title’s primary market is homeowners who sell their own homes. After the business was started, significant strategic problems were uncovered. The owner, Sally (not the owner’s real name), had all the business knowledge necessary to start the business: she understood the market, knew the applications and had good relationships with the primary players.

However, Sally’s most significant challenge was that she had underestimated her own management skills she would need to build a successful business. In order to overcome this challenge, she employed a business coach who taught her the value of ongoing education and provided sound management advice in managing her employees. She also made a practice of reading books and listening to tapes on business management and sharing them with her staff.

The first book she read was *Gung Ho*, by Ken Blanchard and Sheldon Bowles. Sally felt the book was so important that she had her staff meet every morning for 15 minutes to read and discuss it. Response from the staff was so favorable that she now makes attendance and participation in these daily meetings a requirement for all employees.

One of Sally’s favorite tapes is called *A Day in the Zoo*. It compares different types of people to different animals in a zoo. As we toured the office, Sally pointed out the different pictures her staff had posted. Each picture reflected a different animal and contained a caption that reflected the primary behavior pattern of the person who reflected that specific animal’s behavioral traits. Scenes such as this make it clear that her staff members enjoy the meetings; they contribute and create the corporate culture of integrating ongoing learning into their way of life. Sally benefits two ways from this type of interaction. The first is that she is getting the results she had hoped for. The second is that Sally loves to start her day with lively interchanges, debates and free-flowing discussions. She gains energy from her interactions with others and these meetings allow her to openly share her thoughts, feelings and ideas.

An important part of ABC Title’s approach is to set expectations for employee participation. If any employee decides not to participate in the morning meetings, he or she is asked to look elsewhere for employment. Sally is very clear about detailing expectations during the interview process, so there are never any surprises about ramifications if rules are not followed.

Sally has created a corporate environment where learning and personal improvement are an integral part of her business practice. This continuous learning led to ABC Title receiving several awards and being recognized by the state of Ohio as a successful small business enterprise.

Quiz: What behavioral styles are exhibited by Sally?

Director  Thinker  Socializer  Relater

*The answer appears at the end of this chapter.*

## A Case Study in Creating a Company Culture—The Doctor's Office

Another organization we interviewed was **We Fix Your Allergies Center** (not the real name).

Their culture is evident the moment you walk through their door. The waiting room does not look or feel like a typical waiting room. Dr. Sinus' (not his real name) office feels more like stepping into a living room ... *his* living room. Every aspect of the waiting area is designed for comfort and safety. The feeling of the office is one of security; you know you are in capable hands.

The doctor spent years creating a theme throughout his practice to make his patients feel safe and comfortable. He believes that if his patients feel secure and relaxed, they would be open about sharing about the activities in their lives that might be contributing to their health problems.

The warm, caring culture reflected in the physical environment extends to the personnel as well. Each person we spoke with was open and friendly. Each person who works in his office has the same warm and caring approach. Dr. Sinus' personal approach is reflected by each of his employees.

The Allergy Center's office was overstaffed as compared to other doctors with similar size client bases. Each nurse spends (on average) 30 minutes with each patient, capturing all the necessary details. The patients' information is entered into a customized software application that manages all aspects of the office: billing, instructions, medical records and interview notes.

When Dr. Sinus enters the examination room, he has all relevant case information at-hand, because it was already captured and entered by one of his staff during the interview process. By reading the notes and asking clarifying questions, he is able to provide better treatment for each patient. Improving lives is what motivates Dr. Sinus.

One activity the doctor dislikes is paperwork. The customized computer system he designed generated all the paperwork electronically, using data captured during the patient's visit; a big relief for the doctor.

The employees love working there. The average tenure is almost 10 years. Some employees have been with him more than 20 years. Dr. Sinus does a great job identifying what he wants his practice to "feel" like and he invests heavily to make that dream a reality. All this is working for his patients as well; Dr. Sinus has less than a 5% cancellation/no-show rate.

Quiz: What personality type is Dr. Sinus?

Director  Thinker  Socializer  Relater

*The answer appears at the end of this chapter.*

## Behavioral Styles' Strengths and Weakness in Creating a Company Culture

Our purpose in creating this book is to use every aspect of the business as part of a business development engine. Let's take a minute and analyze both the strengths and weaknesses of the four behavioral styles in creating a winning company culture.

### Strengths of Thinkers in Creating a Culture

As we create a company culture and review the business strength of a Thinker, we know that they:

- Are concerned with processes; want to know how things work

- Are intuitive and original; once they know the expected structure, they may invent their own structure, method or model
- Are more interested in quality than quantity; prefer lower output to inferior results
- Need to be right; employs logical thinking processes in order to avoid mistakes
- Impede progress (sometimes) with their constant checking and rechecking
- Dislike unplanned changes and surprises
- Reject open aggression

Some of these principles allow Thinkers to do a great job of building the type of culture they want in their business, and once they make up their minds, there is no stopping them. When a Thinker is in charge, people know what is expected of them and where they fit in the bigger picture.

### **Weaknesses of Thinkers in Creating a Culture**

In business, Thinkers are the refiners of reality. They seek neither utopias nor quick fixes. Because of their risk-averse tendencies, they may overly plan when change becomes inevitable. Planning is their way of improving their odds. They like working in circumstances that promote quality in products or services. When possible, they prepare ahead of time for their projects and then work diligently to perfect them to the  $n^{\text{th}}$  degree. Their thorough preparation minimizes the probability of errors. They prefer finishing tasks on schedule, but not if it might be at the expense of making a mistake. They dislike last-minute rushing and inadequate checking or review.

Thinkers prefer logic to emotions and rely on reasoning to avoid mistakes. They tend to check, recheck and check again. They may become mired down with accumulating facts and over-analysis. They are uncomfortable freely giving opinions or partial information until they have exhausted all their resources. This attention to logic can frustrate other behavioral types who want a conceptual, “big picture” overview of the current situation.

Thinker’s fear-based behavior—when carried to an extreme—can cause problems that are difficult to fix. Their desire to avoid risk, married with their passion for planning, can result in a culture that is overly rigid (assuming they can get out of the planning phase). When processes are created, activities are defined at such a detailed level it is possible for employees to “leave their heads at home.” Carried to an extreme, there is nothing an employee can do to make the job “theirs.” There is no individual ownership in a culture a Thinker creates. Thinkers allow for little or no flexibility for an individual to perform tasks in a creative or different manner that works better for them. Employees are asked to perform specific functions and not deviate from specific activities. They focus so much on predictability and efficiency that it is not uncommon for effectiveness to suffer. Rigidity often results in low morale, unhappy employees and high turnover.

Thinkers would benefit by listening to people who see the big picture, make small decisions faster and allowing themselves (and others) to “loosen up” a little at work.

### **Strengths of Relaters in Creating a Culture**

Relaters thrive in a culture where expectations are clearly defined and stability is the order of the day. Relaters are strong listeners who appreciate a consultative approach based on communication in a friendly,

open environment. They like to be involved and have a sincere interest in how things will impact them personally.

The key for Relaters is having a friendly social environment that allows for ample time for change to occur. This time allows them to process those changes, making them feel less intimidating. This is not always a strength, but it does keep them from rushing headlong into uncharted waters. Their slower approach toward risk and change may lead to trouble if swift, decisive action is required.

### **Weaknesses of Relaters in Creating a Culture**

Relaters are slow to change and they like the change to be gradual and well thought out before it is implemented. This slow approach to embracing change creates problems for Relater business owners because the only constant in business today *is* change.

Relaters are also risk-averse. For a Relater, a known situation (even if negative) is more comfortably tolerated as opposed to the unknown: change. They require personal assurances and time to support others through any transition. Detailed follow-through and personal assurances are necessary with Relaters.

Under duress, Relaters may appear to be wishy-washy, indecisive leaders. More Direct people (Directors and Socializers) are often put off by their inability to make decisions.

### **Strengths of Directors in Creating a Culture**

Directors, by the sheer force of their strong personality, often create a culture within their organization. Their leadership, quick decision-making process and win-at-all-cost mentality are forces to be reckoned with. If Directors take the time to visualize the type of company culture they want to create, define the types of people who would be successful in their organization, *and* take the time to create the type of culture to support the organization they are building, they will enjoy a significant advantage over their competition.

### **Weaknesses of Directors in Creating a Culture**

The Director's strengths (if taken to an extreme) can become a weakness when creating a company culture. Directors don't care about process and procedures (which are the heart of a company's culture.) They want results, and they don't care what they have to do to get them. It is very difficult for a Director to wait for the process/people to work and/or evolve; but this is precisely what they should do: Let the people do their jobs within the confines of the process that was built. It helps if the person running the day-to-day operations of a company is someone other than the Director (behavioral style). If the opportunity presents itself, a Director would be wise to hire a Chief Operating Officer (COO). A COO is responsible for the day-to-day operations of the business. A good COO will be able to complement the Director's strength and supplement the Director's weakness. A good COO also understands the power of culture and knows how to use it to his or her advantage. They bring the best out in people because they know what their jobs are and they produce the results that will be used to measure performance.

Depending upon the company, the industry and the organizational culture, a good behavioral style to complement a Director is often a Thinker. Thinkers can implement processes and procedures that support the culture the Director is building.

For example, if a company is a nonprofit with many Relaters in its employ, it might be best to have a Relater as the second in command. That person would be able to relate to the rest of the organization and address the emotional needs of the employees within the organization.

### Strengths of Socializers in Creating a Culture

Socializers are great at building the social aspects of a company's culture. They know how to have fun and throw a good party, and they are continually optimistic and enthusiastic. They like the limelight and thrive in the attention. They interact well with others and promote a lively, up-tempo work environment.

Every organization needs to take time and have some fun. Too often, leaders become so engrossed in running their businesses that they fail to take a minute and address the social needs of the people within their organization. People spend so much time focusing on work and tasks that a change of pace is important to the health of the organization. Socializers have the perfect behavioral style to help people within an organization have fun.

### Weaknesses of Socializers in Creating a Culture

Socializers do not like routine and thrive on variety. They are long on generating ideas, but short on follow-through. They are not interested in details but are great at creating enthusiasm and sharing stories. Socializers need to collaborate with someone who will help implement their great ideas. Pair up a Socializer with a Thinker. This approach will ensure that the details are handled. Otherwise, you will need to manage the Socializer very closely to ensure all the details are addressed.

Socializer's short attention spans and haphazard follow-through often create mistrust with Relaters, Directors and Thinkers. Unless a Socializer learns to focus or delegate assignments effectively, they often have a hard time retaining employees who seek structure, predictability and stability.

### What to Focus on When Creating a Company Culture

Remember, the purpose of a culture is to create behavior and action that will enable an organization to be successful over an extended time period. As a business owner, *you* need to define this behavior. Culture will be different for every business. Our purpose is to help you create an organization where every person and every department contributes to the development of your business. To capitalize on this opportunity, focus on:

“What can this department, process and/or individual do to add more value within the organization?”

Value is defined as: “Contributing to the bottom line of the business by creating opportunities for more business.”

The focus should always be on *creating value* and *promoting effectiveness*. With emphasis on effectiveness, the right amount of efficiency will be implemented in the business. When making a change in the business, the most effective questions are: “What impact will this change have on the company and our culture?” and “How will this change move our organization toward the desired goal?”

### Business Characteristics of the Typical Thinker Include:

- Concerned with process; wants to know how something works
- Intuitive and original; once they know the expected structure, they may invent their own structure, method, or model
- More interested in quality than quantity; prefer lower output to inferior results

- Wants to be right; employs logical thinking processes in order to avoid mistakes
- Sometimes impedes progress with their constant checking and rechecking
- Dislikes unplanned changes and surprises
- Rejects open aggression

**Business Characteristics of the Typical Director Include:**

- Sets firm rules and regulations
- Imposes clear penalties when rules are disobeyed (although they often break their own rules)
- When positive results are discovered, they push hard to improve the method for increased efficiencies
- Are willing to try new things, but expect quick results
- Expect others to adapt as quickly as they do

**Typical Business Characteristics of the Relater Include:**

- Needs to know the order of procedures; fears the unknown
- Slow and steady; builds strong and deep relationships, but with fewer people
- Operates well as a member of the work group
- Motivated by customary, known, proven practices
- Oriented toward more concrete, repeatable actions
- Wants order and stability in the workplace
- Focuses on how and when to do things
- Works in a steady and predictable manner
- Likes a long-term relationship with their place of business and their fellow employees

**Preferred business situations for the Socializer include:**

- Likes to work interactively with others
- Needs personal feedback and discussion to get – or stay – on course
- Likes to mingle with all levels of associates and calls them by their first names
- Enjoys compliments about themselves and their accomplishments
- Seeks stimulating environments that are friendly and favorable
- Motivated to work toward known, specific, quickly attainable incentives or external motivators (dislikes pursuits which drag out over long time periods)
- Open to verbal or demonstrated guidance for transferring ideas into action
- Likes to start projects, but prefers to let others handle the follow-through and detail work

## How Do You Know if You Have Problems with Your Company Culture?

Each company has a culture, even if it has not been consciously created. Creating a culture is designed to answer one question: How do I get my employees to express a certain attitude or behavior that is going to make my business successful?

Capturing corporate knowledge is largely a business process. Please rate your corporate culture below.

Company Culture	Strongly Disagree	Disagree	Slightly Disagree	Slightly Agree	Agree	Strongly Agree
Expected behaviors clearly defined in your business plan						
Employee morale is high						
Employee turnover is low						
Steps to implementing specific behaviors are defined in your business plan						
Employee development is part of your corporate culture						
You have identified your ideal employee						
You have captured (documented) your organizational (how you do things) knowledge for future employees to use as reference						
You communicate expectations of appropriate behavior to your employees						

A defined culture goes a long way toward identifying the acceptable behaviors of an organization's employees. In many cases, it allows a company to define the types of behaviors expected from its employees as well as define the type of employee that fits into the company.

It is hard to generalize from a short assessment, but if most of your answers fall into "strongly disagree, disagree, or slightly disagree," most likely you could reduce costs (possibly hiring and training) and improve productivity by defining and implementing a corporate culture consistent with your behavioral style.

### End-of-Section Activities:

**Answer to Quiz 1:** What behavioral styles are exhibited by Sally? If you answered "Socializer and Director," you are correct. Sally loves the daily interaction and free-flowing discussions; these are clearly Socializer traits. However, the fact that Sally has made the meetings mandatory and lays down the law during the interview process are Director traits.

*Key point to remember: Everyone has a predominant style; one they wear as comfortably as an old pair of jeans. However, each of us is a blend of styles and often switch between styles depending upon the situation. This is why The Platinum Rule is based upon observable behavior and not personality types. If you were to interview with Sally, you would do well to stick to business and get to the point. However, during the morning group discussions, you could "let your hair down" a little and have some fun.*

**Answer to Quiz 2:** Quiz: What personality type is Dr. Sinus? If you answered "Relater," you are correct.

## The Cost to Win a New Customer Far Exceeds the Costs to Keep an Existing Customer!

### Customer Service

“It’s true. U.S. firms, on average, will lose half their customer base over the next five years. And 68% of those customers will leave because of a bad service experience.” Mosaix, *Achieving Business Success Through Customer Relationship Management (CRM)*

Customer service has received a lot of attention over the years. From the perspective of a small company, customer service can make or break a company.

“Don’t be content with doing only your duty. Do more than your duty. It’s the horse that finishes a neck ahead that wins the race.” Andrew Carnegie

Mosaix goes on to say that “service leaders (companies which provide superior service to their customers) enjoy the following advantages over their low-service (and often larger) competitors:

- They grow twice as fast.
- They experience a 6% annual market share growth vs. a 1% share loss (they take customers away from their competition).
- They can charge 10% more for their products and still take customers away.

Because of this, they enjoy a 12% vs. 1% average return on sales.

The numbers definitely show that the practice of providing superior customer service increases shareholder value and creates a competitive advantage that is worth the investment in customer service tools, techniques and training. Customer Service is especially important when, in many companies, 20% of a company’s customers generate 80% of the profits.

If we think about the benefit of building a relationship with a client in human terms, people prefer doing business with people they know, like and trust. Not only will a good relationship bring more business from the client, but satisfied clients will be more likely to tell others about the positive treatment they have experienced. Customer satisfaction brings referral business to the organization.

Clients will also tell others about bad experiences. As word spreads about a bad customer service experience (as it will), it drives others away from doing business with your company. Customer service is nothing more than defining and implementing the ground rules on how the company will treat its customers. The customer is looking to understand these rules and wants nothing more than a predictable experience.

Industry statistics show that 68% of customers who walk away from a business relationship do so because of poor customer service. Poor customer service happens at all levels within an organization. In financial terms, a 5% increase in customer retention could result in a 25% to 85% increase in profitability.

Let’s look at an example. An associate purchased a cordless phone that had an integrated fax machine. After using the phone for two days, he realized the battery was not charging.

When he called customer service, a company representative told him they would not replace the battery because it was a consumable, and all consumables must be purchased. The replacement battery was more than 30% of the cost of the phone. The attitude of the customer service organization was a problem because this customer expected to purchase a working phone. He was of the opinion that the company should absorb the expense of a new battery.

After repeated calls to the customer service department and asking to be connected with decision-makers higher in the organization, this customer heard the same message, “It is our policy not to replace

consumables at no charge.” Finally, in frustration, the customer returned the phone and made the decision not buy anything else from this company, including a flat panel TV this ex-customer had been planning to buy. The customer service policy cost the company a total of \$2,700. This \$2,700 included the cost of the fax machine and the new television. As a small business owner, could you afford to lose \$2,700 worth of business?

If your customer service department consistently handles customer problems poorly, how many \$2,700 lost opportunities will you have? How many people will this ex-customer tell about his negative experience? How many future purchases from this customer would you have lost? How many times do you think this story was told where the company name was mentioned? On average, a customer will tell nine other people about an unpleasant experience and only two about a positive experience. How many of your clients are selling *against* you? How many are selling *for* you?

Without exception, the successful companies we studied go out of their way to service their customers. These firms understand that it costs almost 10 times more to find a new customer than it does to keep an existing customer. Jay Conrad Levinson discusses how it takes nine quality touches to get a prospect’s attention. He estimates that it takes 27 touches to make contact with that prospect nine times.

Moreover, these business owners know that their customers are their windows into the world. Using information from their customers, they are better able to understand how their products are used and/or how their services are valued. This knowledge allows them to respond faster when new needs are discovered. Successful customer service means that every customer is comfortable giving you, your company and your product a good reference and a referral.

Successful companies understand the trust their customers place in them when purchasing their products and services. Each does what is necessary to ensure a positive and beneficial experience for their customers. The following comments reflect the overall attitude on customer service:

*“Stress the importance of strong customer service; never close a door on a relationship.”*

*“All design and development is done by full-time employees so the customer has many points of contact with all people within the company. All customer questions are answered by the person who is responsible for the issues.”*

*“And always remember, clients don’t care about what we think is important!”*

*“When you stay close to your customer, it is easier to identify a need in the market and focus your efforts on solving meaningful issues for that customer.”*

*“More loyalty can be gained by correcting mistakes in a pleasant manner than by providing flawless services without error.”*

Customer Service will make the difference in the long-term levels of success a company enjoys.

## **Behavioral Styles Strengths and Weakness in Delivering Exceptional Customer Service**

### **Strengths of Thinkers in Customer Service**

If we review the business strengths of a Thinker as they apply to customer service, we know that they are:

- Concerned with processes; want to know how things work
- Intuitive and original; once they know the expected structure, they may invent their own structure, method, or model
- More interested in quality than quantity; prefer lower output to inferior results

- Want to be right; employ logical thinking processes in order to avoid mistakes
- Sometimes impede progress with their constant checking and rechecking
- Dislike unplanned changes and surprises
- Reject open aggression

Depending on the type of product being supported in the customer service area, a Thinker could be a perfect candidate for this position. If the product being supported is complex, such as a jet engine, a Thinker would be a great candidate. In this situation, the problem-solving process and the attention to quality and detail are required behavior characteristics. Thinkers like to know what is expected of them and where they fit in the bigger picture. They are objective, calm and unemotional problem solvers. Additionally, they would be less likely to become drawn into an emotional conflict with an unhappy customer.

## Weaknesses of Thinkers in Customer Service

As we mentioned earlier, Thinkers are the refiners of reality. They seek neither utopias nor quick fixes. If your product or service requires building strong relationships with customers, a Thinker may not be the best behavioral style for customer service.

One company has built its entire customer service model around building long-term, quality relationships with its clients. In this customer service department, a Relater would excel. Thinkers do not fare well in this environment because they are more focused on working the process, even if it is not in the best interest of the customer. Additionally, Thinkers are not empathetic listeners; they are critical listeners. Therefore, if an angry customer is looking for a sympathetic ear, a Thinker would be unlikely to lend one. They would be good at resolving the issue, but poor at providing feeling-oriented feedback that would make the customer “feel good.”

## Strengths of Relaters in Customer Service

A quick review of a Relater’s behavior characteristics as they pertain to customer service shows the following:

- Needs to know the order of procedures; fears the unknown
- Empathetic listeners
- Slow and steady; builds strong and deep relationships but with fewer people
- Operates well as a member of the work group
- Motivated by customary, known, proven practices
- Oriented toward more concrete, repeatable actions
- Focuses on how and when to do things
- Works in a steady and predictable manner
- Likes a long-term relationship with their employer and their coworkers

Many customer service organizations are very process-oriented: When a call is received, a formal process is followed to ensure every problem is clearly defined. This process-oriented approach fits a Relater’s behavior style very nicely. It is predictable; the order is defined. The Relater is part of a team, the practices

are proven and the focus is on how and when to do things. A customer service position is, most likely, a good place for a Relater, especially when the emphasis is on building long-term relationships with the customer.

## Weaknesses of Relaters in Customer Service

Relaters have difficulty speaking up and expressing their true feelings, especially if it might create conflict. This lack of expression can cause problems if they have a particularly aggressive person on the phone. They appear to go along with others, even when they inwardly do not agree. This tendency creates an environment where the more aggressive types of customers may take advantage of the Relater. Their lack of assertiveness sometimes results in hurt feelings because they do not let others know how they truly feel. This could result in their feeling abused. They can be overly sensitive and easily bullied.

The Relater's need to stay personally involved in the detailed aspects of work often makes them hesitant to delegate effectively. They often would rather shoulder more work than inconvenience someone else by asking for help. The inability to delegate efficiently could make it frustrating for the caller if too much time is spent in diagnosis and not taking swift action on a solution. Lastly, a Relaters' biggest fear is conflict. Even if they intellectually understand that they, personally, have nothing to do with the frustration the customer is expressing, they will often internalize the pain. Over time, this can really wear down the sensitive, feeling-oriented Relater and they will often head home feeling drained.

## Strengths of Directors in Customer Service

Directors initiate change within an organization and create momentum to drive that change. They focus on attaining their goals, and their key need is to achieve their bottom-line results. The driving need for results, combined with their motto of "Lead, follow, or get out of the way," explains their no-nonsense, direct approach to getting things accomplished.

A Director would be a good candidate to build a customer service center or make corrections to an existing operation. The Director's forceful style could work when every call is a crisis call and immediate action is required. After a problem is correctly diagnosed, they would be quick to make decisions and take action. A center where 911 calls are receive is a good place for this behavior style; Directors typically don't internalize others' problems.

## Weaknesses of Directors in Customer Service

For the Director, some negative traits may include stubbornness, impatience and an appearance of toughness. Directors tend to take control of other people and can have a low tolerance for the feelings, attitudes and shortcomings among co-workers and subordinates.

A Director taking calls for a Suicide Prevention and Crisis Intervention hotline would definitely be a problem. For these types of calls, the representative taking the calls is supposed to be very nondirective and allow callers to solve their own problems. A good call would allow the representative the opportunity to help callers understand what action they would take and encourage them to take action. This would be a difficult situation for a Director.

Any situation where callers need help understanding how to use a product would be a challenge for Directors. Under stress, Directors can come across as domineering and impatient. They do not like working with (or for) people who are slow-paced or who appear to be unintelligent.

## Strengths of Socializers in Customer Service

The Socializers' primary strengths are their enthusiasm, persuasiveness and friendliness. They are "idea-a-minute" people who have the ability to get others caught up in their dreams. With great persuasion, they shape their environments by building personal alliances to accomplish their projects. Then they seek nods and comments of approval and recognition for those results. If compliments do not come, Socializers may invent their own! They are stimulating, talkative and communicative.

They tend to work quickly and enthusiastically with others. They are risk-takers and base many of their actions and decisions on natural impulse and feelings. Their greatest irritations include doing repetitive or complex tasks, being alone and not having access to a telephone!

There may be some areas of customer service where a Socializer would be most effective. Socializers would excel in customer service if placed in a role that they truly believed was critical to the mission of the company. A Socializer's belief would work most effectively in face-to-face customer service opportunities. Their enthusiasm would further the mission of the nonprofit, especially if there is not a lot of detailed follow-up required. Also, Socializers would excel in getting customers "re-excited" to return to using a product or service after they have lost interest.

### **Weaknesses of Socializers in Customer Service**

Socializers' weaknesses in customer service are too much involvement in too many projects, impatience, their aversion to being alone and their short attention spans. They become bored quickly and easily. When a little data comes in, Socializers tend to make sweeping generalizations. Because they see solutions (even wrong ones) so quickly, they often interrupt customers and try to solve problems too soon. This makes customers feel as though they are not being heard, and they leave the interaction feeling dissatisfied... even if the problem is fixed. When Socializers feel they do not have enough stimulation and involvement, they get bored and look for something new ... repeatedly.

Socializers placed within a customer service organization would probably not last very long. Their behavioral style is not conducive to the job requirements.

### **Where to Focus While Building a Customer Service-Driven Organization**

When creating a customer service organization, you need to ask yourself what kinds of service you are going to provide and how you will provide this service. Is it self-service for a commodity product, personalized service for a complex project, relationship-building with a recurring client base or some combination of any two? Correctly answering this question will quickly help you understand what behavioral style would be most effective in performing your customer-service-related activities.

If your customer service department is responsible for answering technical and/or complex questions from customers, hiring Thinkers would be a good choice. If you have a small customer base with an emphasis on creating long-lasting relationships, then a Relater would be a great fit for the job.

It is important to know your customer base and the type of service and expectations from this department. This will go a long way toward creating a successful Customer Service department.

### **Summary**

Many customer service attitudes and behaviors are driven by a company's culture. What is your company's attitude toward customer service? Is it a necessary evil or an integral part of customer experience? Is customer service considered an extension of the sales organization and an opportunity to create additional revenue opportunities?

Your company's ability to retain customers and grow referrals is what will determine if you struggle to survive... or if you *thrive*. Don't build a customer service function around your natural behavioral style; hire people who already have what it takes (are adaptable to others behavioral style) to deliver satisfaction for every problem, challenge or new opportunity.

**End-of-Section Activities:**

Ask yourself what kinds of services you provide for your customers:

1. Does this service give you a competitive advantage?
2. Does your product lend itself to self-service? If so, what is the best way to implement this service?
3. How much does it cost you when you lose a customer? Be honest; include sales time, travel expenses, prospecting time, marketing expense, administrative time, lost revenue and the host of other costs that are specific to your business. Now compare this to how much it costs to keep the same customer. Don't forget to add in repeat business that would not be available if you lost a customer.
4. Are you capturing each contact with the customer: sales, support, customer services and management? Does the entire company understand that each employee is a member of the Customer Service department?

## Discipline is KEY to Any Successful Endeavor!

### Discipline

This chapter is about how companies use discipline as an integral part of their business plan. They use discipline in defining and implementing the strategy, managing a budget, creating an attitude and culture, and implementing their strategy.

The discipline derives from the owner understanding of how the business helps create the life they want. Once they get clear on their expectations from the business, they build a business strategy that describes how the business will support their life's goals. The plan and its execution fall directly from this decision-making process.

Discipline was best described by business owners who said:

*“Stick to what you do best and what you are passionate about.”*

*“Focus on just one or two things—that gets everyone focused. Then don’t waste time, just take action.”*

*“Test, fail quickly, learn and move on.”*

Each company was very focused on driving and measuring the results of their efforts as described in their business plan. They developed their plan and applied the discipline to focus on and work the plan.

Many of the companies had opportunities to engage in activities that were not consistent with their core business. Without exception, they passed on these opportunities, all for the same reason: “It is not our core business and it would distract us from what we are supposed to do.”

This ability to choose to pass on a new opportunity implied that these leaders maintained the discipline to know their business strengths and core markets while staying focused on those critical aspects of the business. They went through the business strategy and planning process and developed a budget to support the business plan. Then they worked the plan.

If they did not approach their business with discipline, they would lose focus and become distracted from the primary objectives. Many businesses fail because of the lack of discipline.

If they did not perform the activities as defined in the business plan, it was difficult for them to plan their day, week and month. The business plan answered such questions as:

- How do I know which activities will help me accomplish my goal?
- How do I know I am making progress?
- I have limited resources. How do I best utilize these resources to reach my objectives?
- When do I execute on decision points in my business plan?

Setting aside a regular time for planning was critical. Depending on the individual, they decided which hours of the day were allocated to working *in* the business and which went to working *on* the business.

Of course, they had a huge advantage in running their own business rather than working for someone else. One company's management team did a plan review every Monday at 6:30 a.m.

Each of the business owners walked a fine line between working on the business and working in the business. When they were working in the business, they were selling, shipping products, or dealing with the endless number of problems that face a business owner every day. When they knew what role the business played in their personal lives, they were able to look at this work as an employee would and document the desired outcome. In the very act of documenting, they were working in the business at the same time they were working on the business. When it came time to hire a new employee, they already knew what they wanted this new employee to do, how they wanted that person to do it and how they would track the desired results.

When they worked on business strategy, they looked at the markets, customers and the financial plan, tracking and modifying it as required. They checked their progress against the plan while checking to see if the plan was still valid. This measuring allowed them to keep the pulse of their clients, competitors and markets, while identifying potential new opportunities.

It is extraordinarily difficult to spend time working on the business when the demands of working in the business are so great. It takes discipline to set aside specific times to work on and modify your company's plan.

The biggest lesson learned was that successful business owners *did what needed to be done, not what they wanted to do*. They dedicated time to focusing on strategic business issues and delegated less significant tasks to others (or moved them to less critical times).

These executives and entrepreneurs were very good at determining the actions necessary to move forward. They were not afraid to make the hard decisions. It's one thing to set a work schedule and stick to it. It's quite another to spend that time doing what has to be done rather than what you'd rather be doing.

For example, if you spend the first three hours of your peak concentration time reading and responding to e-mail rather than working on those hard challenges that require dedicated thinking time, you're doing the right things at the wrong time. Yes, you do need to read and respond to your e-mail, but in most cases, e-mail is not an intellectually demanding task. Do it when your brain is winding down, not when it's at its sharpest. Do the hard work when your brain is at its best.

Also, consider letting your secretary or voice mail answer your calls during planning time. It is easy to get in the habit to responding to interruptions and letting them set our priorities for us. More importantly, we all know how difficult it can be to "get back in the zone" once our brain has been interrupted. Block out time and discipline yourself to eliminate interruptions.

Teach your employees (especially Socializers!) to write down their ideas or questions and then meet at specified times to discuss these items. Encourage employees to not continually interrupt you or each other.

Don't forget to be flexible in responding to unanticipated changes in your schedule. If something comes up that needs your attention, by all means, attend to it. However, make up the time later on. Being disciplined does not mean being rigid, but it does mean finishing "big picture" tasks that support the long-term health of your company.

Here's a tip: *reward yourself for getting the job done*. Nothing motivates people more than to finish a project with the knowledge that when they do, they have full permission to spend time on the other activities that are more consistent with their nature and more personally rewarding.

If you have never taken classes or received training in time management, we encourage you to do so. Learning how to set goals, create action steps and managing your time effectively are critical steps toward success.

## Summary

Discipline is one of three critical components successful companies embrace. They understand the plan and create disciplined behaviors that work the plan. They review the plan constantly and change it when necessary. Know when to work **on** your business and when to work **in** it.

## Behavioral Styles' Strengths and Weakness in Achieving Business Discipline

### Strengths of Thinkers with Discipline

Strengths of the Thinker include accuracy, independence, clarification and verification, fine-tuning and organization. They naturally focus on expectations (e.g.: policies, practices and procedures), processes and outcomes. They want to know how things work so their own actions can be correct. Their core personal need is for autonomy in controlling the processes involved in fulfilling expectations that move toward the intended outcomes.

Thinkers remain disciplined with their own use of time and are most comfortable under controlled circumstances.

### Weaknesses of Thinkers in Discipline

Because Thinkers like to be right, they prefer checking processes themselves. Thinkers will be disciplined in following a process. If the process does not lead to the correct outcome, they will blame the process. After all, they did what they were supposed to do.

Their fear of being wrong can make them over-reliant on the collection of information and slow to reach a decision. While Thinkers are natural observers who ask many questions, they may focus too much on downside possibilities and remote dangers, at the expense of missing upside opportunities and bottom-line payoffs. This would be a problem when trying to follow a disciplined process (maybe buying a company). The Thinker could be so disciplined in trying to understand the entire deal that the opportunity could be missed entirely.

### Strengths of Relaters in Discipline

Relaters are good implementers who are persistent and will usually follow through on the completion of action plan steps. They do so because they hate to let other people down or they fear confrontation.

### Weaknesses of Relaters in Discipline

If Relaters can stay within their comfort zone, with discipline process and procedures, they will excel. Many times a Relater will be late with a project (or work overtime to complete it) because they cannot say "no" to people who ask for their time and attention. It is easy to interrupt a Relater. They will take as much time as needed to help you with your problems, at the expense of getting their own work done. Also, Relaters often have difficulty starting large projects; they procrastinate at the beginning, but usually finish once started.

### Strengths of Directors in Discipline

Discipline is one of the Director's greatest strengths. Directors can:

- Block out distraction

- Say no to a request for their time
- Be very disciplined in doing everything necessary to achieve a goal
- Implement a strategy
- Interpret the rules and answer to themselves without collaborating with others

Directors are goal-oriented and tend to know where they want to go. They have the discipline to enforce the behavior necessary to drive a company toward its goals.

Directors who develop the discipline to take the time to inspire the Socializer (for example) to accomplish something will find it hard to find a more dedicated, committed, hard worker. This is particularly true once Socializers have had time to “connect” the significance of the work to their dreams or their financial future, or see it as a chance to “shine” in front of management or a client.

Directors who put their minds to accomplishing something usually do so. They could easily master The Platinum Rule.

## Weaknesses of Directors in Discipline

For the Director, some negative traits may include stubbornness, impatience and an appearance of toughness. Directors tend to take control of other people and can have a low tolerance for the feelings, attitudes and shortcomings of co-workers and subordinates, especially if others do not exhibit the same kind of discipline, drive and focus as they do.

## Strengths and Weaknesses of Socializers in Discipline

Socializers are the great talkers because they are friendly, enthusiastic and like to be where the action is. They thrive on admiration, acknowledgement, compliments and applause. They want to have fun and enjoy life. Energetic and fast-paced, Socializers tend to place more priority on relationships than on tasks. Socializers can be disciplined about accomplishments if they are enthusiastic about the project. Socializers will try to get others to do the work. Sometimes it would be faster to do the work themselves—but not nearly as much fun as trying to get someone else to do it.

Socializers can be very disciplined (typically in short bursts), especially if they have an opportunity to look good in the process.

The Big Picture is much more interesting to Socializers than supporting details. After seeing the broad overview, they prefer not to personally dwell on specifics. Their enthusiasm helps them generate many ideas, and their tendency to get feedback from everyone helps them select ideas that have a good chance to succeed.

When Socializers are enthusiastic about a project, they can be disciplined in getting it done—even if they don’t do it themselves.

## Weaknesses of Socializers in Discipline

Socializer’s weaknesses are having too much involvement in too many projects, impatience, and having an aversion to being alone. They possess short attention spans; they become bored quickly and easily. The slightest disruption in their thought process can take them off on wild goose chases and they may forget to return to finish the original task they had started. Most always, discipline is the biggest challenge for Socializers in building a successful business.

Their biggest flaw is a tendency to avoid or put off doing tasks they don’t enjoy doing. Socializers would do well to put habits in place whereby they can show off their work/progress in small steps. If they can put their ego aside, Socializers should have Directors or Thinkers continually remind and encourage them to

stay focused and disciplined. It's okay to fall off the horse (and Socializers will), but keep getting back on and working on creating new habits.

Our good friend, Jim Cathcart, is fond of saying: "*To do a job well, picture how the person you most admire would go about doing that job and do it the way he or she would do it!*" This advice really suits our Socializer readers.

### What to Focus on When Creating Discipline Within Your Organization?

When introducing discipline into an organization, it is important to clearly articulate the expected behavior and implement processes to drive that behavior. When we analyzed **Business Predictability**, we found that:

1. *Discipline creates systems*
2. *Systems drive processes*
3. *Processes drive behavior, and*
4. *Behavior drives results.*

If you want to get specific results in your business, you must first define the disciplines you want to introduce and implement measurements to drive the identified behaviors.

### End-of-Section Activities:

1. Are you disciplined enough to define your markets, develop a sales and marketing strategy and measure the success of the programs (to create a business plan)?
2. Do you benchmark your organization against your competitors to measure the effectiveness of your strategy?
3. Do you have a schedule that allows you to maximize your time and effort?

## Attitude Isn't Everything... It's the Only Thing!

### Attitude

"Attitude is a choice. We create the attitude we need that allows us to move toward our goals." Napoleon Hill, author of *Think and Grow Rich*, stated: "Your mental attitude is something you can control outright and you must use self discipline to create a positive mental attitude—your mental attitude attracts to you everything that is in your environment. It is the law of attraction. Your mental attitude creates you what you are." W.L. Hunt

Charles Swindoll makes an even stronger statement:

*"The longer I live, the more I realize the impact of attitude on life. Attitude, to me, is more important than the past, than education, than money, than circumstances, than failures, than success, than what other people think or say or do.*

*It is more important than appearance, giftedness or skill. It will make or break an organization, a school, a home.*

*The remarkable thing is we have a choice every day regarding the attitude we will embrace for that day.*

*We cannot change our past. We cannot change the fact that people will act in a certain way. We cannot change the inevitable.*

*The only thing we can do is play the string we have. And that is our attitude. I am convinced that life is 10 percent what happens to me and 90 percent how I react to it. And so it is with you."*

In the companies that were studied, the successful business owners' attitudes were upbeat, focused and determined. They all share a desire to learn, and many of them believe in sharing what they learned.

"Choosing to live your life by your own choice is the greatest freedom you will ever have." - Shad Helmstetter

any owners faced some pretty serious criticism as they created and developed their businesses. As problems surfaced, any of these individuals could have given up and began working for someone else.

One nominee said, "Don't let criticism get you down," and "Don't listen to the people who say it can't be done."

It is important to have a clear vision and "don't let others talk you out of it." Successful business owners suggest that you follow your dream and "have passion for what you do" and "believe in what you're doing. That makes it fun." Have a good idea about is important as well. "Be the best at what you are doing, and don't copy someone's idea."

Every successful business owner had a very clear idea of the role their business would play in their life. The business was nothing more than a tool to help them live the life they wanted. In being clear in their expectations, they were able to draw significant inner fortitude when necessary because they held to a higher vision. They were able to hold to this higher focus were better able to handle the emotional challenges that inevitably surfaced.

Many of the companies mentioned “teamwork—the employee bond—is how we made it.” The team extended to outside help as well: “Make the leap of faith and trust your advisors.”

There were three major areas where business owners excelled. In the first area, they took 100% of the responsibility for outcomes within their business, especially when things were not going well. They also mentioned that “as an employer, you have the responsibility for each employee’s well being.” Secondly, they were quick to give credit where credit was due. They understood they could not do everything themselves, and the employees, coaches, and partners were necessary to their success. Finally, they had the single-minded focus of growing the business; nearly everything else took a backseat to business growth and development.

“Whatever you focus on is what you get.” - Anthony Robbins

ers stressed the importance of taking emotions out of the decision-making process, while phasizing the importance of “objectivity and independence.”

ting any business off the ground requires persistence and determination. These traits were mentioned several frequently during our interviews.

Attitude was also an important element in building a business, especially in customer service. Almost every individual had something to say about customers and customer service: “Customers always have options. So we made sure all of ours were allowed to choose whether to participate in the new functionality or keep it the old way. It was critical to put customer desires first, even if it meant letting them walk away” and “It’s okay to charge higher rates and turn down some business.”

Almost all of them stressed the importance of goal-setting. It was very hard to know where you are going if you do not have goals. There is a methodology to setting goals to help ensure success and provide focus; for example:

1. If you set a goal and it did not work, you need to take a look at why this happened. The importance of goal-setting was stressed repeatedly. If setting a goal did not work for you, do not stop setting goals. Figure out what you did wrong and try again.
2. Goals need to be consistent with our personal values and beliefs. If you create goals that are not consistent with whom you are, you will lose interest because you created an inherent conflict between what you want to accomplish and who you are.
3. When you create a goal, it needs to be your goal, not your wife’s or husband’s, not your mother’s or father’s... yours! It needs to be what *you* want to accomplish! This applies specifically to your personal goals. Business goals are usually created for you by clients, markets, customers and supervisors.
4. If you can’t get excited about your goals, you will lose interest in them. They will go by the wayside like a fallen leaf or a raindrop, with no more impact in your life. Create goals that you are passionate about, goals that have some inherent risks.
5. Goals must have some inherent risk involved. If there is no risk involved, there cannot be a sense of accomplishment. If you are not stretching yourself and moving outside of your comfort zone, your goals are probably not challenging enough.
6. Many people confuse setting objectives with setting goals. They can have some overlap, but typically goals can be broken down into measurable objectives with definable action steps. We may have many goals, but we must decide which ones are the most important and create a plan to satisfy those

objectives. Your objectives are the action steps that allow you to move forward. Objectives alone are not the goal.

7. Sometimes we are so excited about what we want to accomplish that we set too many goals. It is just not possible to focus on more than one or two. Ideally, focus on one until you have realized that goal. Do not dilute the effort by overextending yourself.
8. Focus on what it looks like to accomplish this goal. Know what it feels like when you have achieved this goal. Plant the end results in your mind and body by seeing and feeling the end results.
9. We need to choose what we will think about. Our thoughts support, or should support, our goals. We cannot have a specific goal in mind if we keep thinking about how it won't work.
10. When you control your thoughts, you are starting the process of controlling your attitude. Decide what attitude you want, and focus on those thoughts.

*"Thoughts lead on to purposes; purposes go forth in action; actions form habits; habits decide character; and character fixes our destiny."* - Tryon Edwards

11. Create a plan that will get you where you want to go. Don't overanalyze if you cannot see the immediate road ahead. Just get started, and you will see the proper course of action to take as you move forward. You can update your plan accordingly as things become clearer.
12. Be persistent! Keep a clear picture of your goal in mind, and keep moving forward.
13. Measure your progress. Change your plan, if necessary. A rocket going to the moon is always making adjustments to stay on course. It is always measuring and correcting its flight pattern. Adjust your course, but keep going.

A major attribute of attitude is work/life balance.

"The best way to predict the future is to create it."  
Peter Drucker  
Writer, Teacher and Consultant

"Balance your personal goals and others' expectations."

In our study, it became apparent how focused the business people were and how they protected their time. They had clear goals in mind (business strategy), were aware of their time constraints and very selective about where and how they spent their time.

Their decisions about time were motivated by how their actions moved them toward their goal.

The successful leaders profiled here understand that every person has 1,440 minutes each day, and the way they spend this time directly impacts how much they accomplish and how effective they are.

Amy Merrill of DecisionPoint Marketing made this comment during our interview: "Treat time as a precious commodity, because it is easy to get involved and let the business suffer." This comment clearly reflects the attitude of conference nominees and presenters. This is not to say that these executives do not give of their time. They do. Many are involved in outside charitable activities, and these activities are very important to them.

Another aspect that was interesting was the ways they manage their time. Repeatedly, calls would be returned after 5 p.m., sometimes as late as 9 p.m. It became clear that anything not directly related to the day-to-day operations of the business, or that was not a marketing or revenue-related opportunity, was one of the last

items addressed in the day, implying there is no such thing as an eight-hour workday. We met with some people early in the morning and others late in the evening. Most did a good job of protecting their day.

One individual, Robert (Bob) Dianetti, of RADcom, made a comment that showed a different perspective on work/life balance. Bob loves what he does and his company is very good at doing what they do. Bob is able to maintain a different perspective than most. His company is an investment of his time, energy and money. He has a very clear expectation of his company to provide the type of lifestyle he wants for himself and his family.

When his company was not performing to his expectations (still profitable but not meeting planned ROI), Bob asked some of the hard questions about his business. He explained that as much as he loves what he does, he treats his company as an investment. This investment, if it did not meet certain personal and business objectives, should be treated as any other investment. It was amazing how he was able to be so passionate about his business and yet so completely objective.

At first, his comments were surprising, but as we thought about his statements over the course of several weeks, we realized that this is probably one of the healthiest attitudes we have encountered. His priorities were clear, he was focused on the outcome he expected, he took action that was consistent with both his personal and business values and objectives, and he knew what he wanted. The business was a tool to allow him to create the type of life he wanted.

Many owners and managers are clear about their priorities and focused on the outcomes they want. In most cases, they are clear from a business perspective about the performance they expect, but do not seem to have the personal clarity that Bob has about treating his business as an investment.

Many of these individuals do not differentiate their personal lives from their business lives. Many of the activities they embrace allowed them to marry both their business and personal lives. Many socialized with their clients and claim them as friends.

The key to success lies in how well you (as a business owner) create an “attitude of success.” Our studies have shown that there are seven behaviors that all successful people exhibit. When these behaviors are implemented in the highest levels of an organization and when combined with the correct attitude, they cascade down through the organization. Successful business owners understand that the organization they manage takes on the attitude of the top person in the organization, and they strive to ensure that their behaviors reflect this. These seven behaviors are as follows.

## **Selfishness**

When I say successful companies are selfish, I am not referring to the childish behavior of *everything is “mine, mine, mine.”* I am referring to a mature selfishness that allows them to make decisions based on the outcomes they want to experience. I define selfishness and intelligent self-interest.

Being selfish asks, "How do I protect my time, energy, and money so I am only spending them on those things that will take me closer to my goals?" This kind of selfishness allows you to make sure your precious resources are only being spent on activities that benefit your company. But, until you can define the types of customers you want to attract and the problems you can fix for them, it is very hard to be selfish. Please see [www.businessmasterynow.com](http://www.businessmasterynow.com) to understand how to create intelligent self interest in your business.

### **Focus**

It is very hard for a company to be focused if it does not know where it is going. The dictionary defines focus as "close or narrow attention; concentration." Without a clear perspective, you (the business owner) cannot focus on the desired outcome. It is too easy to become distracted, unorganized, and inconsistent. When you understand what it is you are to be selfish about, you generate a clear focus—a sense of purpose.

### **Discipline**

Discipline is controlled behavior resulting from training and self-control. Your mind is made up. You have decided to achieve your goals.

Being disciplined means you will not abandon your goals. Discipline has taught you that business life is not smooth and that there will be rough spots. Experience has taught you that by being disciplined, you can get through the tough spots. Your eye is on the target, and you have the discipline of a laser-guided missile; you seek out your objectives, and your focus never falters.

### **Persistence**

*Webster's Dictionary* defines "persistence" as the continuance of an effect after the cause is removed. Once you take the time to create and implement a strategy, your goals will be clear. And when you are focused, disciplined, and selfish, your persistence allows you to see any unplanned obstacles not as problems, but as opportunities. After all, if it was easy, anyone could accomplish what you are accomplishing. But not everyone is on the field of battle with you. They see obstacles and stop. You see obstacles and see opportunities.

As you keep your eyes clearly fixed on your objectives; you try different things to overcome these obstacles. You know where you are going; you know you can't be stopped. You know that your persistence is what drives you forward. You will find a way around any obstacle, and keep right on going.

## Ownership

Ownership is the state of being an owner. It is taking the legal right to the possession of a thing. Not only tangible things, but also your dreams, your goals, your business, and your life; if you do not take ownership for achieving your dreams, who will? As Jesse Livermore said, "There are only two emotions in the market—hope and fear. The problem is you hope when you should fear, and you fear when you should hope."

But not you. Your fear is motivation to move you forward because you learned that when you take action, you get results. You always hope for the best and plan for the worst. You are ready for what life throws at you. You have to be. Taking ownership is about change—making change to move forward, changing behaviors that are not working, and dealing with the world as it is and not as you want it to be.

You own the outcome because you are clear about where you want to go, and you take ownership for it. With ownership, you know that if you are not getting your desired results, you can take action and change the outcome. Ownership is so very empowering. You know that if you do not have the skills, you can learn or hire someone to teach you.

## Orientation toward Results

Results mean ending in a particular way. Once you define your goals—the outcomes you want to achieve—and how you want things to end, you can take ownership to create your desired outcomes. You can create the results.

When you don't get the results you want, you fall back on persistence, ownership, focus, and discipline, and know that you have the skills, the drive, the desire, the knowledge, and the road map that will take you where you want to go. Results are simply a way of measuring your success. You either get the job done, or you don't. If you don't, because of your ownership, you go back and try something different. No excuses. No remorse. Only results. You understand, as Yoda once said, that "there is no trying; only doing."

## **Focus on People**

All successful people understand that their success comes with, and through, other people. That is what this book is about. Successful people recognize these individuals and appreciate them for their contribution to the results. They will also assume complete responsibility for things not working. They must because there is no other course of action when you are the owner and take ownership.

Everything in this book is important, but to make the most of all the information contained within, you need to understand where you want to go and how you will get there. Then and only then can you implement the tools and techniques described in the later sections.

## **Summary**

Owners and managers of these companies treat their time as their only significant asset they “owned.” Decisions about how they use this asset are made based on how the activity supported both business and personal goals. This requires clarity of direction and focuses on decision-making.

They all shared positive attitudes and had strong belief in themselves and their employees. It was a real thrill to be able to discuss the importance of attitude with these capable individuals. Their beliefs and how they used attitude as a business tool to help them through tough times were both inspirational and motivational.

We must always remember that attitude is a choice. You can determine how you choose to react to a given situation. The conference participants were often able to see positive things while in the middle of some very difficult situations.

## **Behavioral Styles Strengths and Weakness in Attitude**

### **Strengths of Thinkers in Attitude**

Thinkers are analytical, persistent and systematic problem-solvers. They are more concerned with logic and content than with style. Thinkers prefer involvement with products and services under specific, controlled, predictable conditions so they can continue to perfect the performance, process and results.

Thinkers prefer to deal with tasks rather than with people, and they like to have clearly defined priorities and outcomes. Give a Thinker a task to do, and it will get done. When Thinkers have definite, precise knowledge of facts and conditions, they quietly hold their ground. They can be indirectly assertive when they perceive they are in control of a relationship or their environment. After determining the specific risks, margins of error and any other variables that significantly influence the desired results, they will take action. Oftentimes, their action may be subtle and indirect. However, if they can control the outcomes, their actions may be more swift and direct.

The attitude presented to a Thinker must make sense, be logical and be supported by facts. They are not comfortable with emotions and tend to filter the emotional message from the logical message.

### **Weaknesses of Thinkers in Attitude**

Because Thinkers like to be right, they prefer checking processes themselves. This tendency toward perfectionism, when taken to an extreme, can result in “analysis paralysis.” In their effort to avoid conflict, Thinkers often refrain from voluntarily expressing their inner thoughts and feelings. This lack of direct feedback may lead to future misunderstandings and weaken relationship-building opportunities.

Thinkers tend to be critical listeners. Generally speaking, they tend to look for “what is wrong” as opposed to “what is possible.” If you are a Thinker, one self-growth tip may be to begin asking yourself more positive questions. Here are a few to jump-start your list:

- How can we move forward on this?
- How can we make this work?
- How will we take advantage of this new challenge?
- How can we turn this setback into a new path toward growth?

### **Strengths of Relaters in Attitude**

Relaters are warm, supportive and predictable. They are the most group-oriented of the four styles. Having friendly, lasting, first name relationships with others is one of their most important desires. They dislike interpersonal conflict so much that when they disagree, they will often keep silent. At other times, they may say what they think other people want to hear. Relaters are natural listeners and like to be part of networks of people who share common interests.

The most important aspect when working with a Relater is to solicit their input and give them time to think and digest the message. They move slowly, and building trust is very important to them.

### **Weaknesses of Relaters in Attitude**

Relaters have difficulty speaking up and expressing their true feelings, especially if it might create conflict. They appear to go along with others even when they inwardly do not agree.

Their need for harmony makes them slower at making decisions as they privately try to find solutions that most likely lead to consensus. Relaters are slow but deliberate in their pace. This deliberate pace results from their desire to minimize risk in unknown situations, partially by inclusion of others in the decision-making process. The Relater’s need to stay personally involved in the detailed aspects of work often makes them hesitant to delegate effectively. They often would rather shoulder more work than inconvenience someone else by asking for help.

### **Strengths of Directors in Attitude**

Directors initiate change, momentum and growth. They are change agents. They focus on attaining their goals, and their key need is to achieve their bottom-line results. The driving need for results, combined with their motto of “Lead, follow, or get out of the way,” explains their no-nonsense, direct approach to getting things accomplished.

Directors want to win, so they may naturally challenge people or practices in the process. They accept challenges, take authority and plunge headfirst into solving problems. They tend to focus on administrative and operational controls and can work quickly and impressively by themselves.

Their primary skills are their ability to get things done, lead others and make decisions. Directors have the ability to focus on one task ... at the exclusion of everything else. They can block out doorbells, sirens, or other people while channeling all their energies into the specific job at hand.

When working on the attitude of a Director, give that person as much control over the creation of the attitude you want him or her to exhibit. Give the person an opportunity to win.

### **Weaknesses of Directors in Attitude**

As mentioned earlier, Directors want to win at all cost. This take-no-prisoners approach will result in a trail of bodies left behind as they achieve the results they so desperately need. They then wonder why they are standing at the top by themselves.

With the Director, there is only *one way* ... the one preferred by the Director! Don't try to tell a Director that he is wrong. He will take it as a challenge and prove you wrong.

### **Strengths of Socializers in Attitude**

Socializers are the great talkers because they are friendly, enthusiastic and like to be where the action is. They thrive on admiration, acknowledgement, compliments and applause. They want to have fun and enjoy life. Energetic and fast-paced, Socializers tend to place more priority on relationships than on tasks. They influence others by their optimistic, friendly demeanor, and they focus primarily on attaining positive approval from others.

Socializers are famous for their optimistic, positive attitudes. They dislike being around (no comma) negative pessimistic people.

### **Weaknesses of Socializers in Attitude**

Their weaknesses are too much involvement in too many projects, impatience, an aversion to being alone and short attention spans. They become bored quickly and easily.

When taken to an extreme, Socializer behaviors may appear superficial, haphazard, erratic and overly emotional. Their need for acknowledgement can lead to self-absorption. They have a casual approach to time and often drive the other styles "crazy" with their missed deadlines and tardiness. The fun-loving, life-of-the-party Socializer can be undisciplined, forgetful, overly talkative, and too eager for credit and recognition. Their natural humor often bubbles over even in serious situations, which call for more reserved behavior.

### **What to Focus on When Creating an Attitude**

The attitude of the business owner is so important because it cascades throughout the organization. It is reflected in the people who are hired, how customers are serviced and why the business exists. When creating an attitude, the focus for the business owner should be: How does creating the business allow the business owner to create the life he or she wants?

The vision to create a specific lifestyle will help drive decisions in the business. It will be the benchmark used to create the strategic objectives of the business. These objectives then lead to how the business will be run. They will be implemented as business systems, information technology systems, people systems and operation manuals used to build and grow the business.

A business owner who wants to create a passive income (a small, internet-based business that requires little—or no—supervision; simple products connected to e-commerce and automated fulfillment) from his or

her business will create a very different set of strategy objectives than one who wants to build a \$100 million business that they personally manage on a daily basis.

**End-of-Section Activities**

1. Do you let your situation dictate your attitude? If so, decide how to use your attitude to create the situation you want.
2. The attitude of the company's owner or president helps create the company's culture. How is your attitude reflected within your company? Has the company created a good-old-boy culture, an autocratic culture, an empowered culture?
3. Does your company set a goal that helps to create the attitude, while supporting the kind of behavior you want from your employees? Remember that systems drive processes, and processes drive behaviors. By defining specific outcomes (behaviors), you can create processes and procedures to measure your success.
4. If you were in charge, what kinds of goals would you set? Would you have a long-term view of the business, or quarter to quarter? This attitude will drive the specific decision-making process to focus on the selected outcome.
5. Are you clear about what's important and how you are spending your time?
6. Are you spending your time on activities that move in the direction of your goals?
7. What changes can you make that would allow you to spend more time on what's important to you?

## Entrepreneurs Are Not Risk-Takers!

### Risk-Taking

*“Some would suggest that entrepreneurs don’t take risks. They are so convinced that they have discovered a niche in the marketplace that the idea of failure doesn’t occur to them. They are, of course, aware of problems along the way, but they will always endeavor to minimize them.”*

We found this quote on the Internet; it was posted by someone named Keith. We used the quote because it nicely summarizes the attitude successful entrepreneurs have regarding risk.

Based on our interviews and observations of successful companies and decision-makers, an entrepreneur is someone who is a reasonable risk-taker, has the self-confidence to take action, is not afraid of hard work, has goals to measure progress, and holds themselves accountable for results.

A reasonable risk-taker is one who defines an opportunity, sees how it solves a problem, and creates and works a plan to address the need. Many of the companies we profiled performed their due diligence on every problem or opportunity, weighed the risks and had then moved forward with confidence.

Self-confidence is an “internal knowing”; a trait that enables successful individuals to move forward when they come to a decision point. Self-confidence comes from either establishing a track record of success or from an ability to take one’s experiences and apply knowledge in new and innovative ways.

The business and financial plan are where the goals are defined and measured. Each of the risk-takers had goals, measured the goals and took corrective action to keep moving forward (see section on Finance & Budget).

Risk implies a lack of certainty in a given situation. There are three primary risks that a company must deal with: **technical, financial and social**.

1. Technical risk is the degree to which it is difficult for an organization to determine the reliability, capacity and precision of a new technology, or whether newer technology will soon make an innovation obsolete.
2. Financial risk is the degree to which an investment decision (e.g. in personnel, technology or development) will yield an attractive return on investment and whether future returns can be accurately forecasted.
3. Social risk is the degree to which conflict is likely to occur during implementation of an innovation. For instance: might a labor union oppose an innovation because of the labor-saving consequences?

Studies have shown that the most successful people make decisions rapidly. They can do this because they are clear about their values and what they really want for their businesses (and their lives.) The same studies also show that these people are slow to change their decisions, if they ever do.

On the other hand, people who fail usually make their decisions slowly and change their minds quickly; always bouncing back and forth trying to decide the best course of action.

Quick decisions can be made (and risk reduced) when you know exactly what you want your business to look like when it is “done.” It is imperative that you clearly define your business’s mission and vision and create a forward-looking plan. When you plan effectively, decisions become quick – and risk is reduced – because the answer to ANY challenge (when analyzed in respect to your goals, mission and vision) becomes crystal clear. Decisions are typically made quickly, and the actions are implemented.

Many of the business owners we interviewed shared how difficult it was to make some of the decisions they made. Yet, when asked what they would do differently, each one said they would have made the decision and implemented the change sooner.

Studies have shown that people who take financial risks in the workplace generally tend to be more successful in their jobs, a finding which runs contrary to the idea that risk-taking is simply self-defeating.

*"Test fast, fail fast, adjust fast."* — Tom Peters

This does not presuppose that the necessary precautions were not taken. Precautions are a necessary part of risk analysis. Risk analysis allows for a detailed understanding of the risks associated with the decision. A risk analysis allows for a financial assessment (impact) of each risk. This analysis allows the creation of a forward-looking contingency plan. When things do not work out as expected, the obstacle has already been planned for and an alternative course of action has already been created.

## **Summary**

Facing risk and making changes are an inevitable part of our business and personal lives. Know your strategy, then take calculated risks designed to reward you with progress toward your goals. Good planning and reliable systems can moderate risk. Being a businessperson, it is your responsibility to understand that a big part of what you do is responding to change. With change comes risk. Understanding how to manage risk is a significant part of managing success.

## **Behavioral Styles Strengths and Weakness in Risk-Taking**

### **Strengths of Thinkers in Risk-Taking**

Thinkers are often excellent risk-takers. They don't rush into decisions and carefully weigh options. As long as they don't "over-think" when presented with a new opportunity, they can excel in this area. They are analytical, persistent and systematic problem-solvers. They are more concerned with logic and content than with style. Thinkers prefer involvement with products and services under specific, controlled and predictable conditions so that they can continue to perfect the performance, process and results.

The primary concern of the Thinker is accuracy. This often means that emotions take a back seat. They believe feelings are more subjective and distort objectivity. Their biggest fears are of uncontrolled emotions and irrational acts, which might prevent the achievement of their objectives. They are uncomfortable with emotionality and/or irrationality in others. Thinkers strive to avoid embarrassment by attempting to control both themselves and their emotions.

### **Weaknesses of Thinkers in Risk-Taking**

Of the four styles, Thinkers are the most risk-conscious and have a high need for accuracy. Combining these factors may lead them to an over-reliance on the collection of information and input from too many sources. Thinkers prefer to deal with tasks rather than people, and they like to have clearly defined priorities. They like to operate at a methodical pace, which also allows them to check and recheck their work. Thinkers have a tendency to eliminate all aspects of risk by understanding all aspects of the risk. This can result in "analysis paralysis," the implication being that the opportunity may be missed because everything about the opportunity may not be fully understood.

### **Strengths of Relaters in Risk-Taking**

Relaters focus on getting acquainted and building trust. They are inwardly flustered by pushy, aggressive behavior. They are cooperative, steady workers who function well as team members. They strive to maintain stability and to create a peaceful environment for others.

Introducing a change into a Relater's day-to-day process will be perceived as a risk to Relaters. Introduce the idea slowly, and give them time to process the idea. Do not ask for feedback immediately because Relaters need time to process the change, both with themselves and with others.

### **Weaknesses of Relaters in Risk-Taking**

While "venturing into the unknown" may be an intriguing concept for some other types, Relaters prefer to stick with what they already know and have experienced. *Risk* is a dangerous word to Relaters. They may even stay in an unpleasant environment rather than take chances by making a change. Disruption in their routine patterns can cause them distress. When faced with a change, they need to think it through slowly, systematically and piece-by-piece in preparing for the change. Finding elements of sameness within those changes can help minimize their stress.

### **Strengths of Directors in Risk-Taking**

A typical Director sees himself as a solutions-oriented manager who enjoys a challenge just "because it's there." He likes the opportunity to complete tasks in a creative manner. He is generally viewed as having a high level of confidence, even when it isn't actually the case. The Director is often the first person to arrive in the morning and the last person to leave in the evening. At the extreme, their high results orientation can lead to an overextended work pattern and result in neglect for their personal and social lives.

Directors are often the first person at work to have a new efficiency "toy." They are the first to have a computer, a fax, mobile phone and (of course) a PDA. Saving time is always a priority for Directors so they can accomplish more.

Directors gain energy by taking risks. They do not feel as bound by conventional restrictions as other types and often feel free to bend rules that get in the way of results. They seek opportunities for change (or they create them!) just to satisfy their need for results. They may even gravitate toward high-risk situations because the excitement of the challenge fuels their drive to exert control in new areas or ways.

### **Weaknesses of Directors in Risk-Taking**

A Director may take a risk just for the excitement of doing something new, having a new challenge to look forward to. Because they are change agents, their primary skills are their ability to get things done, lead others and make decisions.

For the Director, some negative traits may include stubbornness, impatience and an appearance of toughness. Directors tend to take control of other people and can have a low tolerance for the feelings, attitudes and shortcomings of co-workers and subordinates. A Director may walk over someone if he or she thinks it necessary. This in itself can be very risky behavior. Depending on the risk being managed, not having support can be one of the biggest risks a manager can face.

Their complete focus on their own goals and immediate tasks may make them appear aloof and uncaring; insensitive to the how others in the organization manage risk. A Director's attitude toward risk can be a Director's highest risk.

### **Strengths of Socializers in Risk-Taking**

Socializers tend to work quickly and enthusiastically with others. Socializers love the chase, and taking a risk is not foreign to a Socializer. They are risk-takers and base many of their actions and decisions on natural impulse and feelings. Using their natural ability to “sell” others, Socializers can make great evangelists if they believe it will make them look good.

## Weaknesses of Socializers in Risk-Taking

Socializers are great risk-takers and base many of their actions and decisions on natural impulse and feelings. However, making decisions on impulse and feeling can also be very risky. Because Socializers do not like doing repetitive or complex tasks, they need to discipline themselves to perform a thorough risk analysis.

The greatest risk of Socializers is their ability to make decisions based on their feelings and natural impulses. Because of the Socializer’s decision-making process, it can lead to too much involvement in too many projects.

Another risk with Socializers is they tend to make sweeping generalizations on very little data. They may not thoroughly investigate, assuming someone else will do it.

## Where to Focus When Creating a Risk-Taking Company

Being in business is all about taking risks. It is a natural part of daily life. But some changes can carry higher risk than others. The primary objective of introducing a risk-taking culture is not to avoid risk, for that is not possible, but to eliminate as many risks as possible. That is best accomplished by doing a risk analysis, creating contingency plans for possible risks and communicating the change effectively and repeatedly throughout the organization.

### End-of-Section Activities:

1. What are the consequences of taking a specific risk (costs, market failure, etc.)?
2. What are the consequences of not taking a specific risk (opportunity lost, loss of market position)?
3. What risks do you need to take to get you closer to your goals?
4. What will you do if your risk-taking fails? Do you have a contingency plan in place? Have you completed a risk analysis and assigned dollar values to each risk?

## Certainty of Purpose (Defining Success)!

### Business Strategy

What is a business strategy and how is it valuable?

A strategy is typically a component of a business plan that describes what you are going to do and why. The plan covers how you are going to implement the strategy. It answers such questions as:

- What is the purpose of the business?
- How is my company different from the competition?
- What are the goals of the business?
- Which market to pursue, and how large is the market?
- How does a company take the product and/or service to market?
- Who are my potential customers?
- What is the competitive advantage, and how do I know it is an advantage?
- How long until the company is profitable?
- What skills are necessary within my organization?
- What resources are required?
- How financially viable is the business (product or service)?
- How is success defined?

A business strategy is valuable because it provides a directional road map to help you make decisions about where to invest your resources (time and money). Your strategy helps you define the people and talents that will bring about success. But most importantly, it allows for measurement of progress toward a specific goal. The very act of measuring shifts the focus of your organization to tasks that are important.

Before we move forward, it is important to recognize that successful business leaders have three primary traits that help ensure success and long-term viability of the business.

First, they take ownership for the successes and failures of the enterprise. With the realization that they are responsible, they immediately put themselves in the position of taking action for things that are not working.

Secondly, successful business leaders give credit where credit is due; they understand that they cannot be successful without the efforts and support of their staff, family, friends, customers and associates. Once realized, they enable others to feel like they are contributing to something bigger than themselves. However, when things are not working, successful business owners take responsibility. They ask themselves tough questions:

- What can I do to remedy this situation?
- What is not working?
- Did I hire the wrong person (or people)?
- Did I provide enough training?
- Is the strategy still solid?
- Is the plan still effective?
- What action can I take to correct the problem?

The third thing successful business people do is stay focused on executing the plan. You've probably heard about the study by Jim Collins in the Harvard Business Review titled "Level 5 Leadership: The Triumph of Humility and Fierce Resolve." Collins found only 11 out of nearly 1,500 *Fortune* 500 companies that met criteria for greatness—yielding stock returns at least three times the market's—for 15 years after a major transition period. The leaders of these organizations had an iron-willed, professional commitment to the long-

term success of the company, combined with profound personal humility. In other words, they stayed focused on the long-term profitability of the organization while understanding that team members are major contributors to the organization's success.

## What is a Business Plan?

The primary value of your business plan will be to create a written outline that evaluates all aspects of the economic viability of your business venture, including a description and analysis of your business prospects.

A business plan is an essential step for any prudent entrepreneur, regardless of the size of the business. Business plans can vary enormously. Libraries and bookstores have numerous books devoted to business plan formats, and business planning software is also available, making the creation of several different types of business plans easy, organized and professional... including all the essential elements.

Be aware that most start-up entrepreneurs are reluctant to write down their business plan. This can easily be interpreted as a sure sign that they are not 100% committed to the success of their own enterprise. Strange... but true!

## Why Prepare a Business Plan?

Your business plan is going to be useful in a number of ways:

- First and foremost, it will define and focus your objective. It will help you to define how and where to spend your time and with whom you will spend it.
- Another purpose for a business plan is for you to use it as a selling tool in dealing with important relationships—including your lenders, investors and banks.
- You can use the plan to solicit opinions and advice from people, including those in your intended field of business, who will usually give you invaluable advice. Too often, entrepreneurs forge ahead ("My Way!") without the benefit of input from experts who could save them a great deal of wear and tear. "My Way" is a great song, but putting it into practice can result in unnecessary hardships.

## What to Avoid in Your Business Plan

It is easy to overestimate your expected accomplishments. After all, you would not be starting the business if you did not have high expectations for a profitable payout. Before you get carried away, place some reasonable limits on long-term projections. We define "long-term" as greater than one year. Better to stick with short-term objectives and modify the plan as your business progresses. Too often, long-range planning becomes meaningless because the reality of your business usually varies from your initial concept. For established and larger businesses, it is important that you create a three-year, five-year or even a 10-year plan. A larger business has different needs and expectations than a smaller business. Please keep this in mind when reading this chapter. Our focus is on businesses with less than \$50 million in revenue.

Avoid "pie-in-the-sky" optimism. In fact, to offset optimism, be extremely conservative in predicting capital requirements, timelines, sales and profits. Socializers should consult a Thinker to get objective feedback on your plan. Few business plans correctly forecast how much money and time will be required. If this is your first business plan, you will more than likely be wrong. That's okay. The objective is to think—and act—like a big business. As your business matures, the forecasting will become more concrete and accurate.

Do not ignore spelling out what your strategies will be in the event of business adversities and/or setbacks. We like to refer to this as a risk analysis. There are certain assumptions that one makes in documenting a business plan. Usually, the assumptions have a tendency to change over time. In this section, define the potential risks, the impact on the bottom line if they materialize and what action you will take.

Use simple language in explaining the issues. Make it easy to read and understand.

Don't depend entirely on the uniqueness of your business or even a patented invention. Success comes to those who start businesses with great economics and a realistic, workable plan (not necessarily great inventions).

## Six Steps to an Effective Business Plan

Start-up entrepreneurs often have difficulty writing out business plans. This discipline is going to help you in many ways, so **don't skip this step!**

1. Write out your basic business concept.
2. Gather all the data you can on the feasibility and the specifics of your business concept.
3. Focus and refine your concept based on the data you have compiled.
4. Outline the specifics of your business. Using a "What, where, why, how" approach might be useful.
5. Understand your market. A good way to measure your level of understanding is to test market your product or service before your start. You think you have a great kite that will capture the imagination of kite fliers throughout the world? Then hand-make some of them and try selling them first.
6. Choose a healthy, growing and stable industry. Remember that some of the great inventions of all time, such as airplanes and cars, did not result in economic benefit for many of those who tried to exploit these great advances. For example, the cumulative earnings of all airlines since Wilber Wright flew that first plane are less than zero (this means that airline losses have been greater than their profits). Success comes to those who find businesses with great economics and not necessarily great inventions or advances to mankind.
7. Successful people look for people they like and admire, have good ethical values, have complementary skills and more experience. Successful people hire people who have the skills they lack.
8. Define your unique ability and seek out others who turn your weaknesses into strengths.

## TOP 10 DO'S

### Let's talk about the 10 do's of a business plan

1. Prepare a complete business plan for your business. Knowledge is power... but only if you take action.
2. Use the business plan templates. Don't reinvent the wheel. There are hundreds of books on planning.
3. Research (use search engines) to find business plans that are available on the Internet. You can get business plan templates free on the Internet.
4. Submit your business plan to experts in your intended business for their advice. If approached correctly, people are more than willing to help. Just don't abuse these relationships.
5. Spell out your strategies for how you intend to handle adversities. This translates into what you will do if things don't work like you think they will. What are your contingency plans?
6. Spell out the strengths and weaknesses of your management team, if you have one. If you are the management team, do some serious and honest self-evaluations.
7. Include a monthly, first-year cash flow projection. This will tell you where you need to spend your money and how much reserves you will need.
8. Freely and frequently modify your business plans to account for changing conditions. Your plan is a living document that allows you to change as the market changes.
9. Look for ideas outside your industry. We tend to get myopic when we limit ourselves to people within our industry. Japan became a world leader because it looked hard at what America did, found a way to do it better and implemented these concepts in its businesses.
10. Get focused and stay focused. If you are not doing things to reach your business objectives, how do you know you are doing the right things?

## TOP 10 DON'Ts

### Let's talk about some things you don't want to do:

1. Don't be optimistic (on the high side) in estimating future sales.
2. Don't be optimistic (on the low side) in estimating future costs.
3. Don't disregard or discount weaknesses in your plan. Spell them out and define how you will address these weaknesses
4. Don't stress long-term projections. Better to focus on projections for your first year.
5. Don't depend entirely on the uniqueness of your business or the success of an invention.
6. Do not project yourself as someone you're not. Be brutally realistic.
7. Do not try being everything to everybody. Highly focused specialists usually do best. The small businesses we studied carved out a specific niche and stayed focused on their niche.
8. Don't proceed without adequate financial and accounting know-how. If you don't have it, buy it.
9. Don't base your business plan on a wonderful concept. Test it first.
10. Never, never, never skip the step of preparing a business plan before starting.

Let me share with you some **Points to Ponder when creating your plan.**

- Create your business plan before you start. If you've already started your business—create your plan now!
- Being in business is not for everyone, and that's OK.
- It's better to turn down a client than to disappoint one. When someone is disappointed in a product or service, they tell, on average, nine people. When they are satisfied, they tell two people.
- Your business plan needs constant updating.

## How to Create a Business Plan

Creating a plan does not *have* to be difficult or complex. However, depending on your product, service or market, it could be rather involved. There is a five-step process you can use to create a business plan and it is designed to be simple and suitable for most organizations. What are the five steps?

1. Vision
2. Resources
3. Skills
4. Incentive
5. Action planning

The first step, Vision, asks and answers a single question: What is my purpose for being in business? Wal-Mart's vision is "to give ordinary people a chance to buy the same as rich people." A vision for a restaurant might be "to serve fresh, healthy, home-cooked food." We like to think of it as the way you want the community to see your business. In Scott's business it is: "Help our clients make more sales with less effort."

The vision statement is followed by a mission statement.

The mission is designed to support the vision and describes how the vision will be implemented. Wal-Mart's mission might be "to provide quality merchandise at low prices." The restaurant's mission might be "to support the local community by buying all food products fresh from the local community." The vision defines the purpose and the mission describes how the vision will be implemented. Scott says that The Cyrano Group "Provides technologies and methodologies that salespeople master in minutes."

The second step addresses resources. Without a vision and mission statement, it is harder to accomplish this step. The fundamental purpose of this step is to answer the question: What do I need to implement the vision and mission? This is designed to be very broad, and it can reach into all areas of the business. Some questions you might consider include:

- Is there a new market for the existing products and services?

- Is it necessary to change people, process, technology or trusted relationships?
- What new systems are required (or removed from production)?
- Is it necessary to purchase a new plant or acquire a new company?
- What is the market?

These are important questions because without these answers, people become anxious. If you do not ask yourself tough questions, you will lack clarity in product and service offerings. For example, if you are selling windows, where should you sell them? Will you sell them through distributors or manufacturer representatives? Do you sell them through a direct sales organization? Do you buy and re-sell someone else's windows or manufacture our own? Do you sell them in a specific territory, or is it more regional? Additional follow-up questions would include:

- Who are your customers? Are they homeowners with a yearly income of 50K year? Are they homeowners whose homes are worth at least 500K? Are they homes that are 40 years old or older? Are your customers new home builders that require wholesale pricing, but do the selling for you?
- If the window that you selling can work in two different markets, do you need two different approaches?
- What are the pains you solve for your customers? Are you selling a product (such as a window), or are you selling security, comfort, appreciation in home value and protection of assets?

The most important question is, why would someone buy windows from you? What differentiates you, or your products, from your competitors? Do you have the right product for your market? Are you selling a high-end product to a low-end market? Or, are you selling a low-end product to a high-end market?

Learn to ask yourself tough questions and answer them honestly. If you do not know the answers, ask your potential customers what they want to buy.

These are all questions that are addressed in the resource section of the business plan. Every question you ask must be related back to the vision and mission statements. If you cannot tell how a specific action or strategy supports the vision or mission, we would ask you to think about why you are doing it. This clarification process is used to define the resources you need to support your plan.

The third step is to answer the questions pertaining to the skills needed by your organization. You defined your purpose for being in business, described how you would implement the vision and documented the resources necessary to implement the vision. Now it is time to identify the skills necessary to implement your plan. If our company will be selling windows, it would be useful to have home improvement experience. Otherwise, the management team sets the employees up for frustration. If I don't know how to measure a window or know what energy-saving glass is or how it works, how can they be successful? Do you hire this resource or contract it out? What financial skills are necessary? For example, running a mature company requires a different set of skills than a start-up.

If you are purchasing a company, experience in acquiring companies would be very useful. If you need capital, knowledge in raising money would be beneficial to the organization. This same approach applies in the plant, information technology, sales, marketing and front/back office applications.

The fourth step is managing change, or incentive to change. How do you create and implement incentive programs that motivate? Remember the behavioral styles we discussed earlier? Do you think all four behavioral styles use the same incentive system? Of course not. If you have the wrong incentive systems in place, you run the risk of not motivating employees. If change does happen, it will take much longer than it should.

The final step is the action (implementation) plan. If the action plan, or implementation plan, is not defined and executed correctly, you will have a series of false starts. What are the benefits of having an action plan? In a word—discipline. You can implement measurable and repeatable business processes to allow the organization to institutionalize what works. But in order to do that, you have to know where you are going and how you are going to get there.

### **Summary**

A business plan is critical to an organization's success. A good strategy will address five specific areas: vision, resources, skill, incentive and plan. Each area requires discipline to think through, document and implement. If you miss a step in the process, you create problems. If you don't follow the vision, you create confusion. Skipping the resource step creates frustration. If you don't analyze required skills, you create anxiety. Not addressing the incentive can cause change to slow. Finally, not creating a good, sound action plan will cause many false starts.

**End-of-Section Activities:**

1. Do you know where you want to go?
2. Do you have a plan for where you are going and how you are going to get there? Do you adjust it regularly to accommodate changes in the business environment?
3. Is your team on board? Do they understand and accept the goals, methods and skills required?
4. Are your skills and activities consistent with your goals?
5. Does the action plan, when implemented, creates the desired results?

**Strengths and Weaknesses of Behavioral Styles When Creating a Strategy****Strengths of Thinkers in Business Strategy**

Thinkers are great at following a plan; it is part of their nature. Once the plan is defined and agreed to, you can feel very good about executing.

Thinkers also excel in the seeing the flaws and problems with a plan. They have great analytical abilities and can dissect a plan quite easily. Thinkers are also strong researchers. If you need facts, figures, or competitive analysis, Thinkers are great at either finding or developing the material. Thinkers will typically think about the plan from conception and spot potential problems that others may gloss over. This makes Thinkers great employees to do the risk analysis of a plan. Be sure to give them some guidance, or they will create a document too complex for the average person to read.

**Weaknesses of Thinkers in Business Strategy**

Thinkers are risk-averse and have tendencies to over-think and over-analyze a plan. This risk-averse behavior may cause them to take too long to finish the plan.

When the plan is complete and a Thinker is asked to implement the plan, it will be executed. It may not be executed correctly but it will be executed. Thinkers are very process-oriented, and if the desired results are not achieved, they will blame the process. After all, the Thinker only did what he was asked to do. If you want different results—change the process.

Thinkers are not typically big-picture thinkers. As a business owner, you will need to guide the Thinker. You do this by starting at the bottom and showing them the necessary steps to achieve the desired outcome. This makes the Thinkers excellent implementers. As a result, they may not see the value in the planning process because the outcome is difficult for them to see.

Thinkers are critical thinkers. As a result, they can needlessly poke holes in an idea. This can cause problems because many good ideas die before they can be tried.

**Strengths of Relaters in Business Strategy**

Once the plan is defined and Relaters understand their role, they are great at plan execution. Relaters are great at building teams and moving a plan forward.

When building the plan, Relaters will focus on how the plan affects their team. This can add significantly to the parts of the plan that focus on company culture and skill sets. Because Relaters are great at team-building, they can bring great information for team about challenges and opportunities in the business that others may miss. Also, Relaters are great at gaining consensus on the final outcome of the plan.

**Weaknesses of Relaters in Business Strategy**

Many of the strengths of Relaters can also be weaknesses during the business planning process. Relaters are slow to make change; it may take too long to gain a consensus if time is in short supply. They also can lose

focus of the bigger picture because they tend to focus on the impact the plan will have on the team. Relaters are notorious for procrastinating when starting large projects. If you are a Relater, don't view the creation of a business plan as a project; see it as a series of documenting your thoughts, objectives and intended outcomes.

### **Strengths of Directors in Business Strategy**

Directors are great at setting goals and creating a plan to implement the defined goals. They may not write them down or share them with others, except on a need-to-know basis. Directors are great at seeing the big picture and because they "fly at 40,000 feet" and tend to work a project from the top down. They know where they want to go, and they put a plan in place to take them there.

Once the plan is created, Directors are great at implementing it. They delegate quickly and are effective at managing multiple processes. They work fast and can manage many details and activities at the same time. They are disciplined in following the plan and ensuring the organization follows the plan.

### **Weaknesses of Directors in Business Strategy**

Directors are very goal-oriented. This is important because a business plan is a series of well-defined business goals. Directors are very good at keeping goals in their head. They may not do a good job of sharing the goal with others unless they see a good reason for doing so. Directors may make changes in the plan and "forget" to tell others.

Directors expect others to do what they are told—without explanation. Directors may change the plan unexpectedly (but not arbitrarily) and not let others know. Because Directors are so results-oriented, they may not solicit input from others in the organization. Finally, Directors often become frustrated in dealing with employees who do not see the big picture, or complete tasks as quickly as they may do so themselves.

### **Strengths of Socializers in Business Strategy**

Socializers are great at selling the plan across the organization. The Socializers' ability to build relationships and create enthusiasm in others makes them natural motivators when selling the plan to others in the organization. This is critical in large organizations where buy-in is critical.

### **Weaknesses of Socializers in Business Strategy**

Typically, Socializers will not follow a plan. If they do, they will only work on what interests them (typically brainstorming, sales and marketing). If Socializers take the time to build the plan, they will not follow it—especially if an unexpected opportunity surfaces. Socializers are not good at managing the implementation details. Socializers need high-level flash reports that provide a good summary; they won't review details.

### **What to Focus on When Creating a Business Strategy**

As a proponent of Peter Drucker's school of business, we want to stress how important it is for you to become a customer-driven organization. Money isn't the primary reason for being in business; customers are! Find your customers' needs and learn how your products and/or services fill those needs. Once the customers' needs are defined, build a customer-focused organization to support the actions that satisfy those needs. What are the behaviors, actions, metrics and rewards needed to inspire employees to action?

### **End-of Section Activities**

1. Has your company created a business plan? If not, why not?
2. Does a process exist in the organization to review the business plan on a regular basis?
3. Does anyone in the organization have a responsibility to drive the planning process?
4. Are the business goals of the organization defined and distributed throughout the organization?

5. How do your products and service satisfy your customers' problems?
6. Do you have a company vision/mission statement that everyone knows?

## Financial Goals are Critical!

### Financial and Budget

A budget is a plan—a financial plan—that is written down and quantified. Your budget is the financial aspect of your business plan. One reason for a budget is to provide your firm with financial goals. When your plan is absent, how will you know where you are going? As Yogi Berra once said, “If you don’t know where you’re going, you probably won’t get there.”

A primary purpose of a budget is to force management to think ahead. When plans are made in advance, more choices are available than when operating in firefighting mode. This provides a framework for better decision-making.

*Side note: If you are a Socializer, give yourself a big pat on the back for reading this section! You are already learning to adapt your behavior!!*

A final benefit of budgeting is that it becomes a tool for communication and provides a corporate framework for standardizing activities and communicating goals. The CEO uses the budget process to show stakeholders (including staff) where he or she wants to take the organization.

The master budget is broken down into operating budget and financial budget. The operating budget provides all the information necessary to prepare a budgeted income statement. The financial budget includes the cash budget and financial projections. Once the budget is created, it is helpful to have a budgeting process. Budgeting is the frequent comparison of actual and budgeted items. This comparison allows an organization to investigate variances and to correct problems when it strays from its budget.

The first step in the budgeting process is the completion of an environmental statement. The environmental statement allows the corporation to understand its position with its suppliers, competitors and customers. This includes changes in customer base, technology changes and industry trends. This analysis allows the company to know where there is room for improvement and how much it needs to improve.

Management then develops a set of general objectives. These objectives are a broad-based look at what the firm hopes to achieve. Is the company in rapid growth, facing pricing pressures or customer erosion, planning expansion or facing competitive pressure? Measuring against a budget and income projections will allow you to make corrections quickly and accurately.

The next step in the budget process is developing a set of financial assumptions. Assumptions include inflation rate, impact of competitors on product prices and sales activities, potential price increases from suppliers, etc... After a clear understanding of the environment is defined, measurable goals should be established.

At this time, we would like to discuss goal-setting. Financial goals, like all goals, must be *achievable, measurable and time-bound*.

*Achievable* goals are realistic; “stretch” goals have their place in personal growth, but goals that are unrealistic can create internal and external problems for an organization (please see the chapter on Attitude).

*Measurable* assumes that they are being tracked and measured, helping you take corrective action when variances are detected.

Finally, a good goal is *time-bound*. This means that a specific timeframe is assigned for achieving a goal. The budgeting timeframe is most often an annual event.

Important aspects of goal-setting:

- If you are dissatisfied with your company's performance, you need to make sure goals are identified, clearly communicated and measured.
- Make sure your corporate values allow you to support your goals. Goals need to be consistent with your corporate values. If you create goals that are not consistent with your corporate values (usually identified by a company's culture), you will create an inherent conflict between what you want to accomplish and other people's expectations.
- Prioritize your goals and fix your attention on a small number of goals. The more goals you focus on, the more difficult your business becomes.
- Make goals measurable.
- Create your plan and implement it. Take action everyday to take you closer to your desired outcome.
- Measure your progress and adjust accordingly.

Small business owners we interviewed reinforced these ideas with their comments:

“Spend money the right way.”

“Making investments wisely—don’t fear spending according to a plan.”

“Know and measure the numbers. Measure and consider risk and reward.”

“Manage the banks. We found that local community banks were not as supportive of small business as the large, regional banks.”

“Don’t be under-funded. Stay focused!”

And last but not least: “Manage by the numbers and watch cash flow.”

Successful owners discussed the importance of using the numbers to take calculated risks. By having a good handle on the numbers, they were better able to identify opportunities that were consistent with their financial goals.

These owners talked about making *planned* purchasing decisions. If new technology was needed, they researched their best options and budgeted for the purchase in the coming fiscal year.

As variations to the plan were identified, were these variations due to an unforeseen change in the market, customer base, pricing structure or price increases from the supplier? Did this require an adjustment to the existing plan? If so, what was the impact on the rest of the business?

## Summary

The budget and planning processes were very important to conference participants. This financial plan defined the existing financial environment, looked at external factors that could impact the company, allowed the company to develop goals and measured the progress against these goals. The process needs to be flexible enough to make changes based on variances and changes in the financial and business environments.

## Strengths and Weaknesses of Behavioral Styles in Finance and Budgeting

### Strengths of Thinkers in Finance and Budgeting

Thinkers are analytical, persistent and systematic problem-solvers. Thinkers are attracted to accounting and financial projects. They are more concerned with logic and content than style. Thinkers prefer involvement with products and services under specific, controlled, predictable conditions so they can continue to perfect the performance, process and results. What's more predictable than numbers?

The primary concern of the Thinker is accuracy. When putting together a budget and financial reports, accuracy is extremely important to them. Thinkers see themselves as logical problem-solvers who like structure, concentrate on key details and ask specific questions about critical factors. They are masters at following important, established directions and standards, while still meeting the need to control the process by their own actions. Process-oriented Thinkers want to know why something works, since such insight allows them to determine for themselves the most logical way to achieve the expected results—from themselves and others.

### Weaknesses of Thinkers in Finance and Budgeting

Because Thinkers like to be right, they prefer checking processes themselves. This tendency toward perfectionism, when taken to an extreme, can result in “analysis paralysis.” These overly cautious traits may result in worry that the process is not progressing exactly right, which further promotes their tendency to behave in a critical, detached way.

The Thinkers’ fear of being wrong can make them over-reliant on the collection of information and slow to reach a decision. While Thinkers are natural observers who ask many questions, they may focus too much on downside possibilities and remote dangers … at the expense of missing up-side opportunities and bottom-line payoffs.

Thinkers may spend too much time in the Budgeting phase while ignoring income-generating functions like sales and marketing.

### Strengths of Relaters in Finance and Budgeting

Relaters like routine, predictability and defined limits. They tend to anchor the other types with their patience, cooperation and follow-through. They need a firm grip on the facts before feeling ready to proceed, so they prefer systematic information whenever possible. They enjoy team efforts and willingly work to bolster comfortable and efficient working conditions.

Relaters typically do well with Finance and Budget, as long as they actually start the process. Hitting numbers brings about feelings of security and predictability.

### Weaknesses of Relaters in Finance and Budgeting

Relaters have difficulty speaking up and expressing their true feelings, especially if it might create conflict. They appear to go along with others even when they inwardly do not agree. This can be problematic when discussions get heated, as they sometimes do when talking about money. This tendency creates an environment where the more aggressive types may take advantage of the Relater.

Relaters would do well to continually steer the conversation right back to the facts: the budget. This would allow them to express their feelings about the situation without having to internalize the conflict.

### **Strengths of Directors in Finance and Budgeting**

The value of a budget for Directors is their key need to know if we achieved the bottom-line results. The driving need for results, combined with their motto of “Lead, follow, or get out of the way,” explains their no-nonsense, direct approach to getting things accomplished.

Directors want to take charge of situations so they can be sure of attaining their goals. There is no better way to take charge in a situation than to know the numbers, hit the numbers and set higher goals.

### **Weaknesses of Directors in Finance and Budgeting**

For the Director, some negative traits may include stubbornness, impatience and an appearance of toughness. Directors tend to take control of the budget and tell other people what they need and when they need it. This behavior can cause the Directors to alienate subordinates and vendors. Under stress, a Director may ignore the budget, make an unplanned purchase and worry about cash flow another day.

### **Strengths of Socializers in Financial and Budget**

Socializers are not typically interested in the numbers unless those numbers help them look good. Because Socializers gravitate toward positions in sales, they focus on the numbers because of the positive feedback they receive when they reach the numbers. Numbers tell the world how good they are.

### **Weaknesses of Socializers in Finance and Budgeting**

Socializers prefer careers that maximize their influence and persuasion with other people. They tend to gravitate to environments that allow them to socialize, mingle and gain positive feedback. Numbers are something Socializers are not particularly interested in unless the numbers tell the world that they are doing a good job.

Socializers prefer concepts over details. They also tend to be overly optimistic. Being positive people, they tend to avoid bad news. If they sense sales are down or that they are over spending, Socializers may avoid reading the reports that verify the bad news.

### **End-of-Section Activities:**

1. Does your company have a financial budget in place?
2. If so, is it being used to make purchasing decisions?
3. Does the budget support the business' strategic plan?
4. Are the goals of your financial plan consistent with your company's culture? For example, if company growth has been flat for years, it might not make sense to set an aggressive target goal until you are sure the right people are in place and the marketing and sales organization can create new growth.
5. It might not make sense to compete on price unless you have driven the costs out of the business that allow you to compete on price.
6. Does your company have the tools to measure budget versus actual performance against plan?

## Create Measurable, Repeatable, Predictable Processes!

### Business Predictability

Every company has processes; some are clearly defined, others are implicit. Business processes are the methods of delivering products and services. When a process is not clearly defined and documented, every situation is unique and requires human intervention. The goal for introducing predictability in your business is to ensure that each employee has a clear understanding of the outcomes you want your customer to experience; independent of where in the process each interaction occurs.

Without exception, each executive we interviewed continuously improved existing business processes; becoming more efficient, effective and productive... while reducing costs. What many of them did not say or could not articulate was that business predictability is as much about marketing as anything else. Business predictability in your organization should be designed to give your customers a completely predictable experience. Consistency gives them a comfort factor that your organization will always behave in the same way each time they interact with your company. Consistency makes your company the safe choice for your customers; they always know the expected outcome. As a rule, people would rather buy a familiar (or safe) choice over a new choice, even if the new option appears better.

Business processes include a wide variety of tasks: processing invoices, servicing customers, shipping products and handling complaints. Everything your business does should be converted into a process that can be measured, modified, streamlined and redesigned (created). If you take a big-picture approach, your business processes include your management information systems. A company's business processes define the interaction between your organization's employees and the ways employees interact within the larger framework of the company, and how successfully the company interacts with the external environment.

How do you know what processes need improvement? Problems manifest themselves in different ways. Some examples of problems in business processes are noted below. Does the process have:

- Inherent delays?
- Excessive transportation and storage requirements?
- Low ownership and/or accountability?
- A high percentage of mistakes requiring rework?
- Significant paper handling?
- Recurring problems?
- An unusually high percentage of wasted time and/or energy?
- Poor feedback system?
- Focus on quantity, not quality?
- Long cycle times/long process times?

Many of the companies studied were very clear on the impact of implementing process improvement in their businesses.

*“... putting a process in place that ensures that everyone is treated the same (especially important during growth)”*

*“Continuous improvement is essential, especially based on customer feedback.”*

*“Constantly analyze and improve your business or production processes.”*

*“The way to succeed is continuous improvement; nothing is sacred.”*

*“When business processes are broken down into well-defined segments, individuals who may not have completed an advanced degree can become excellent employees.”*

*“Put people first—have your hiring, education and termination processes firmly in place.”*

*“One secret is to carefully nurture the sales process with a unique approach: he uses an internal sales staff, but because different qualities are valuable in each of the stages of selling—generate/qualify/close... he actually uses different people for each stage.”*

Many processes used in many businesses have not been designed; they have evolved over time. “Build it as we go” philosophies lead to inconsistent processes that are not as effective and efficient as they should be. The “Ready... Fire... Aim!” approach to systematizing processes lead to activities that drain personal and organization energies.

Many owners understand the value of process improvement from the financial perspective, but sometimes miss seeing wider reaching implications. Solid business processes should:

- Drive a company’s culture
- Define how well new employees are trained
- Set expectations on how well customers are treated
- Propagate the attitude of the company owners throughout the organization

There are many reasons need to design solid business processes:

- Mergers or acquisitions
- Inefficiencies / cost controls
- Lack of process effectiveness
- Competition and global pressures

One of the biggest opportunities for performing process improvement is to drive a specific set of behavioral expectations into your organization. Remember, discipline creates systems, **systems drive processes; processes drive behavior; behavior drives results**. Behavior within the organization must become predictable. If you are not getting the desired results from your business, good processes will remedy the problem.

You cannot manage outcomes, only behaviors. If you are not getting the results you expect, are you managing the behaviors that drive the desired results? Behavioral changes can be implemented through understanding the behavior you want from your employees, implementing the processes to drive that behavior and measuring the results.

Measure results! Otherwise, how will you know how effective each process has become? Many people assume that once a business process is modified that the work is over. In reality, this is only partially true. A good process is not only measurable but time-bound as well. As your business changes, it will become necessary to maintain progress made by “enhancing” your processes. If you fail to test, measure and adjust, the ineffectiveness that created the initial need for change will be continually reintroduced into your process.

Be careful not to become too internally focused on your business processes. Many people enjoy designing or redesigning processes, and over time, they spend more time working on the activities of process improvement instead of focusing on the expected results of the process.

One company Ron interviewed refused to let a proposal go out the door until it was reviewed by more than *twenty people!* In this process, people would fly in from all around the country for a monthly configuration review meeting. People were more focused on the meeting than on the result of the meeting. Lack of timely turnaround resulted in the sales organization finding ways to circumvent the process in order to be more responsive to the client. In most cases, the configurations being reviewed were not the same configurations being presented to the client.

If you are thinking about implementing a process improvement project in your company, a good methodology (overview) is especially important. Consider the one described here:

- **Planning & Organization:** Know what you want the redesign to accomplish. For example, do you want to:
  - Drive down costs
  - Make your company more responsive
  - Implement an empowering employee culture
  - Clearly define roles and responsibilities
- **Data Gathering & Recording:** What data do you need to gather? How will you gather that information? As a business owner, you must know how the data gathering tools and techniques support the project objectives. Will you:
  - Conduct interviews?
  - Conduct employee surveys?
  - Document the process?
  - Conduct site surveys?
- **Analyze Data:** Take what you learn and create a baseline process. After the baseline is completed, you will better understand the implications of making a change in the process.
- **Create a Work Analysis Report:** Document your findings and distribute the results to the correct audience for validation and approval.
- **Redesign the Process:** Redesign the process to drive the expected behaviors, cost savings and productivities defined in the *Planning & Organization* phase of the project.
- **Analyze Risks:** Understand the risks associated with the planned changes. Do a risk analysis and create a contingency plan in the event that certain risks materialize.
- **Create an Implementation Plan:** Quite often when processes are changed, companies use this opportunity to implement new technologies. Process improvement does not necessarily *require* the use of technology, but it is quite common. When technology is implemented, make sure you find the best way to implement and utilize it effectively.
- **Create a Cost/Benefit Analysis:** The irony here is that we listed cost/benefit analysis last. ***In reality, there should be a review of expected costs and benefits with each phase of the project.*** This step is nothing more than the formalization of what you have learned in the prior steps.

## Summary

In summary, poorly designed or implemented processes are the root cause of many problems.

Most processes have not been pre-designed; they were built on-the-fly. Well-designed business processes have a clear definition of roles, responsibilities, expected timeframes and process objectives. Well-defined business processes can lead to higher employee morale, improved customer satisfaction, increased productivity and reduced costs, and improve bottom-line performance.

### **Strengths of Thinkers in Implementing Business Predictability**

Thinkers are great at developing processes. They love having predictability in the business and having processes clearly defined and continually refined. Thinkers place high importance on having processes and policies followed... to the letter of the law. A primary goal of a Thinker is to introduce accuracy into any process. Thinkers need to know how to justify actions logically, and they do this through planning. Thinkers develop efficient and effective processes.

### **Weaknesses of Thinkers in Implementing Business Predictability**

Thinkers can overanalyze a process and make it so complex that it ceases to be effective. Thinkers also have a tendency to think in terms of productivity and efficiencies while not being concerned with the effectiveness of the process. A Thinker has a tendency to focus on the process and not the outcome. Thinkers need to remember that people are involved in every level of the business and their activities are what keep the business going. Thinkers need to focus on the overall results of the process (the outcome) when designing processes for predictability.

Thinkers have a tendency to over-automate processes. Morale issues arise because participants don't gain a sense of ownership over the process. A Thinker would be wise to consider having a Relater review the process before putting it in production. While Thinkers focus on accuracy, Relaters focus on communication and involvement.

### **Strengths of Relaters in Implementing Business Predictability**

Relaters do a great job of getting people involved and developing a consultative approach to implementing predictability in any organization. Relaters like the stability, while Thinkers love the process. Having a well-defined process will make Relaters feel very good about the organization. A well-defined process will clearly define how the Relater can work with that process.

### **Weaknesses of Relaters in Implementing Business Predictability**

The very nature of implementing predictability in the business is going to be a problem for Relaters. Relaters love stability, and you cannot implement predictability in a business without change. Pulling decisions out of Relaters is difficult; every decision implies change, and change implies conflict. When under stress, Relaters tend to become submissive. This means they can be easily overpowered by the more dominant individuals in the group.

Introduce change slowly to Relaters whenever possible. Provide time for them to process their feelings and implement the change in a friendly manner (by providing personal assurances); focus on how it will help them increase security and stability.

### **Strengths of Directors in Implementing Business Predictability**

Directors are decisive and impatient. They want everything immediately; including changes that can be measured and adjusted. The Director's abilities to marshal an organization to a specific purpose, provide the leadership to make it happen and to make quick decisions are all necessary components to implementing predictability in any business.

### **Weaknesses of Directors in Implementing Business Predictability**

The challenge with Directors is that they have no interest in details and they have a tendency to make decisions without fully considering the impact upon others within the organization. They do not tolerate indecision well, and their emphasis is on results. The Director approach is to make change for the sake of change, because if it doesn't work, you can always change it again. Directors would benefit by setting the tone and direction for a project and then turn implementation over to a Thinker. The role of the Director would change to project champion. The Director would then clear out obstacles that are hindering the project, make the tough decisions and provide the leadership to ensure a successful conclusion to the project.

### **Strengths of Socializers in Implementing Business Predictability**

The best role for a Socializer regarding business predictability is that of cheerleader and internal sales representative; "selling" the project to other team members. This allows Socializers to be in a position that leverages their natural strengths: motivating others to join a cause, the chase, recognition and the visibility of being the front person on an important project.

### **Weaknesses of Socializers in Implementing Business Predictability**

Implementing predictability in an organization for a Socializer is going to be a challenge. They dislike routine, tend to be disorganized, avoid details and have a strong need for personal approval. Many of these personal attributes are inconsistent with implementing predictability; the focus should be on building routine systems. We recommend that you excuse Socializers from any long-term projects after the brainstorming and "internal selling" phases.

### **What to Focus on When Implementing Business Predictability**

Business predictability is all about creating a smooth-running engine that enables your people to respond consistently and predictably to the needs of both internal and external customers. This predictability needs to follow the business strategy where the business experience is defined for the client. Visualize every step of your "customer experience" and build your systems to support this vision. Track, measure and adjust... often.

### **End-of-Section Activities:**

1. Do any of your processes require review and rework?
2. Do the same problems keep recurring?
3. Is there high waste?
4. Do your processes lack feedback systems?
5. Is the processing cycle time too long?
6. How long are process delays? Is this a problem?
7. Who owns the process?
8. Who is responsible for refining your processes?
9. Are the people involved in each process being held accountable for the quality of their work?
10. Does the process have clearly defined roles and responsibilities?

Well designed business processes have a clear definition of roles, responsibilities, timeframes for completion and defined objectives that lead to improved morale, increased productivity, reduced cost and improved performance. **Examples of business processes include: accounts payable, product development, order entry, etc.** Please rate your business process(es). Feel free to use another sheet for each process if necessary.

Please specify a business process: \_\_\_\_\_

Business Process Improvement	Not Applicable	Strongly Disagree	Disagree	Agree	Strongly Agree
High rework required (repeating steps)					
Same problems keep recurring					
Inefficiencies in the process					
Poor feedback systems (unsure how to isolate problems)					
Long cycle times (steps within a process)					
Long process times (the process itself)					
Process delays (time spent waiting)					
Low process ownership (who is the person I call who can get the problem fixed?)					
Low process accountability (who does what activities within the process?)					
Lack of clear definition of roles & responsibilities (who do I call, and what types of problems do I handle?)					

If you have a check mark in the “agree” or “strongly agree” categories, it is an indication that further investigation is required. There could be a very strong payback for your investment in refining this process.

If your check marks fall into the “strongly disagree” or “disagree” categories, you are probably doing quite well.

## Use Information Technology as a Strategic Weapon!

### Information Technology

Information Technology (IT) should be an asset and support your business through a clear definition of the role technology will play in the business. IT's role should be defined in your business plan.

Implementing a full technology strategy can have benefits that cascade throughout the organization. For example, a tactical use of technology: XYZ Company decides to build its own PCs using components purchased from local vendors, because they decided it was less expensive to do it this way. When the true cost was analyzed, it became apparent that this was not the case: the component cost was less expensive, but the overall costs were higher. When a machine broke and needed repair, it was taken apart, and the broken component was sent back to the vendor. Factoring the time to disassemble and troubleshoot, voided warranties, costs of inventorying extra parts and rebuilding machines (when included in the total cost) made it clear that it was far less expensive to buy PCs than to build them.

Let's look at a different use of technology: Another company decided to purchase a software application. They assumed they could implement the program less expensively than by engaging an experienced consultant. Seven years later, the program was still not running smoothly. They overestimated the skill sets of their employees, they did not plan effectively, they failed to assign time allocations for each activity and they under-funded the project.

On the other hand, when a technology strategy is defined and implemented as part of the formal business plan, the risk is significantly reduced. Your strategy needs to address:

- Company hardware and software standards
- Definition of roles and responsibilities
- Vendor performance management criteria
- Asset retirement strategy
- "Buy vs. Lease" analysis
- How technology supports the business plan

Let's discuss how to create and implement an information technology strategy. The approach to IT must be addressed as part of your business plan. You must investigate and clarify the roles technology will play in your business. From an information technology perspective, there are only three kinds of projects:

1. Those necessary to remain in business
2. Those necessary to stay even with your competition
3. Those that provide a strategic advantage

For our discussion, we will focus on the third type of projects, those that give you a strategic or competitive advantage.

First let's define strategic and competitive advantage. A strategic advantage can be thought of as redefining (or changing) how the game is played. For example, Amazon changed the rules for bookstores. Books can now be purchased online and shipped to your door quickly and inexpensively. You can read other's opinions and track other purchases. Today, more books are sold over the Internet than sold in bookstores. This changed how bookstores market to attract and retain customers. Many of the smaller bookstores went out of business, and the larger stores added coffee shops or cafés. Some invite entertainers to perform at their stores, many bring in authors for signings; all in an effort to attract customers.

Wal-Mart is a great example of creating a competitive advantage through the strategic use of information technology. They were successful in integrating a supply chain and driving costs down. Savings were then passed on to customers. They compete effectively on price and quality because of their strategic use of information technology.

A competitive advantage raises the bar in every niche, market or industry. For example, when a manufacturer creates an innovation that allows them to produce the product for 20% less than the industry average, the rules haven't changed, but the competitive bar has been raised to a new level. Other definitions of competitive advantage could be higher quality, lower cost, speed to market, and/or improved customer service.

What kinds of problems can be addressed by the effective use of IT? This is a broad question, and IT can be leveraged in many markets, on many kinds of applications and on many different kinds of problems. Some of the more effective solutions would address the following business challenges:

- Foreign / local competition
- Deregulation
- Globalization
- Mergers & acquisitions
- Increasing productivity
- Controlling (or lowering) expenses

Challenges generally fall into the following categories:

- Manufacturing & high-tech firms
- Deregulated companies
- Mergers & acquisitions
- Companies facing financial crisis
- Companies under heavy end user demand
- Highly competitive service industries

Many people mistakenly believe that management understands every aspect of IT. Nothing could be further from the truth, especially in smaller companies. Management, through the effective use of strategic planning, must define the role IT will play within the organization. They must define critical processes and applications, return-on-investment challenges and priorities of business objectives and budget. These include:

- Cost/Benefit analysis
- What constitutes a hard dollar return-on-investment
- Soft dollar benefits that are acceptable
- Which external/internal agencies/departments will be used for benchmarking
- Defining the biggest impact on the business
- How priorities are determined

“Hard dollars” can be defined as activities that contribute to expenses being taken out of the business or money coming into the business that directly impacts the bottom line. “Soft dollars” impact the business, but not directly. An example of a hard dollar savings would be the elimination of three people from the process. An example of a soft dollar savings would be to increase productivity of the existing staff so that more work gets done by the same number of people; no additional hiring is required. Another example would be leveraging smart CRM technology to send marketing messages to existing customers; an increase in sales is realized, but you have no accurate measurement of actual sales growth directly related to the activities.

## How to Measure IT Value

IT does not typically generate direct value. IT adds value by facilitating productive and effective use of existing business processes. You accomplish this by defining core processes that most impact your business objectives that cost-justify moving the project forward. Depending on the processes, the cost justification would include:

- Reducing cost
- Improving productivity
- Increasing throughput
- Increasing market share
- Improving shareholder equity

Each of your business units has a different expectation on how IT should perform and where in the organization the impact would be greatest. For example, if your stakeholders for a specific application or project include chief executive officer (CEO), chief financial officer (CFO), directors, or business owners, the metrics they use to determine the effectiveness of a project might include:

- Revenue
- Net income
- Cost savings
- Stakeholder earnings

If the primary stakeholder were the customer, use a different set of metrics to determine the value of a project to the organization. Some metrics may include:

- Customer satisfaction
- Customer retention
- Customer profitability
- Increased sale/transaction
- Customer service levels

If the value is in a business process that crosses multiple departments, divisions or organizational boundaries, value could be defined as:

- Cycle time reduction
- Productivity increase
- Reduced costs

Value can (and should) be measured differently within the IT organization. These metrics might include:

- Number of transactions accurately processed
- Staffing requirements
- Overall costs
- Meeting deadlines
- Maintenance costs
- Training costs

### How do you appraise your situation?

If you want help appraising an immediate opportunity (or eliminating a threat), you can use the following methodology. *Use this only as a guideline to quickly assess your situation.*

The first step in the process is to identify the opportunities and/or threats being felt. Once the opportunities/threats are identified, take the following action:

- Prioritize the opportunities/threats based on impact to your business plan (if you have written your business plan). Otherwise, assess the impact to your business in general.

- Determine the seriousness of the threat or the potential of the opportunity.
- Make a decision about the urgency of the threat or the potential of the opportunity.
- Perform problem analysis to validate seriousness, urgency and impact.

The outcome of this analysis will be a list of the top two or three opportunities/threats upon which to focus. Once this is complete, take the following actions:

- Determine the root cause of the problem
- Define metrics for solutions
- Brainstorm solutions
- Select a course of action
- Perform risk analysis
- Determine budget
- Create implementation plan
- Assign resources
- Assess skill sets
- Implement plan

For every technology intervention, there is a customer using the results of the solution implemented. Customers can be defined as either internal or external, so maintaining a customer focus, not a technology focus, is important.

### **Moving forward with a project**

For applications used to interface with customers or manage customer expectations, such as (Customer Relationship Management (CRM), the focus should be on solving a business problem that improves the customer experience. You have decided there is a problem and that you want to solve it. What steps do you take to reduce your risk and increase your opportunity for success? If you follow these steps, you will be well on your way to effective and productive use of information technology:

- Define a measurable goal or outcome
- Ensure the project aligns the business objective with the IT objective
- Make sure you obtain executive support for the project
- Ensure the business drives the functionality
- Minimize (or eliminate) customization of the software
- Use trained, experience consultants
- Actively involve Users in the solution
- Invest in training
- Measure, monitor, track and adjust

### **Ten Critical Success Factors**

There are ten steps any business owner should follow to ensure projects progress forward in a timely manner. The most critical step is ensuring the project supports your business plan. If the project does not solve a problem or satisfy an objective described in your business plan, why do it? If the project directly supports the business as described in your plan, take the following steps:

1. Create a vision for the project (impact/expected outcome)
2. Define critical success factors (how do you know you are done?)
3. Define incentives to support the desired change (why is the project important?)
4. Name one decision-maker who owns the results and give that person the authority for the project
5. Define necessary skill sets

6. Determine if the players will be employees or external resources (or a combination)
7. Find/train the players (and don't skimp on training)
8. Create an action plan (realistic, measurable and achievable)
9. Perform a risk analysis and create contingency plans
10. Measure progress. Be flexible and adjust... often

## 11 Mistakes You Can Make to Ensure Project Failure

As you look at the steps necessary to be successful, you should also understand why projects fail. Failures can often be traced to specific actions. These errors significantly increase the odds of failure:

1. Approve a project that does not support your business plan
2. Don't share your plan with others or provide regular status updates
3. Don't implement a change management procedure
4. Don't budget correctly
5. Don't use the right people
6. Underestimate the amount of time the project will take
7. Don't do an implementation plan
8. Don't perform due diligence when selecting vendors
9. Don't write a contract (or statement of work) that defines deliverables, outcomes, payment milestones, change management processes, budget, timeframe and/or required resources
10. Don't assign roles and responsibilities
11. Don't train the Users

## Create a 90-Day Plan

We talked about the importance of IT to the organization and how to identify and manage effective projects. We discussed the importance of following the proper methodologies for eliminating risks and improving your odds for success.

Here are simple steps to help you move forward with confidence:

- Clearly identify the priorities of stakeholders
- Define the outcome(s) you desire
- Set metrics for measuring the outcomes
- Measure...
  - Before; to establish a baseline
  - During; to measure changes
  - After project completion; to see if metrics were met

## The Actual Plan

The action plan is broken down in three separate and distinct phases to allow you to take progressive steps. This planning process will allow you to learn at your own pace and get comfortable with the process.

Month 1 - Audit your processes to identify business inefficiencies.

Month 2 - Define and prioritize your company's requirements.

Month 3- Evaluate and select technology vendors.

## Month One

During the first thirty days, focus on identifying speed bumps within your business:

- Review your planning strategy, tools and processes needed to forecast *customer demand*.

- Evaluate how your company manages and mobilizes working capital, inventory, cash and resources to fulfill customers' orders. Assess the effectiveness of your company's procurement and inventory management.
- Determine your ability to make decisions in real time.
- Analyze your business processes. Look for opportunities to automate manual processes; shorten the time it takes to move through the supply chain.
- Explore how technology could be used effectively within your business.

## Month Two

Define and prioritize your company's requirements and determine how they support specific objectives documented in your business plan:

- Assess your findings and prioritize inefficiencies based on the costliness to your company.
- Categorize your business requirements as "must have", "like to have" and "nice but not necessary".
- Prioritize projects based on return-on-investment (ROI), cost and potential impact on the business.
- Present findings to stakeholders.
- Develop an accurate and realistic project budget and timetable to completion.
- Research best practices.

## Month Three

You have done your homework on your business. Now it is time to determine who can help you in a manner most consistent with your expectations:

- Evaluate and select technology vendors based upon:
  - Technical expertise
  - Knowledge of your industry
  - Other requirements specific to your business
- Calculate full implementation costs, including:
  - License costs
  - Training costs
  - Customization costs
  - Hardware costs
  - Software costs
  - Maintenance
  - Support costs
- Determine the amount of disruption to your business:
  - Downtime
  - Lost productivity
  - Training
  - Learning curve

Congratulations, you are now ready to move forward with confidence! Remember, having knowledgeable partners reduces the risk and lowers your stress level. Do your homework, find the right partners and trust their judgment.

## Summary

Technology is here to stay. Understand that the items described may not be relevant to all businesses. Depending upon the size of your company, some of the processes outlined may be superfluous. Remember to treat your IT team (or vendor) as a partner in your business.

## Strengths of Thinkers in Information Technology

Thinkers are excellent for the creation and the implementation of an information technology plan. Putting the plan in writing gives them clarity and documentation. They are logical, methodical planners and can provide solutions that will reduce the risk and improve the probability of success. They seek precision in their work and they are deliberate in their decision-making. They enjoy the process, and once the process is defined for them, they will follow every step in the process.

## Weaknesses of Thinkers in Information Technology

The potential downside for Thinkers is that they are perfectionists and can over-think any process. They may come back with six different options and confuse you with alternatives. You must be clear in your instructions and expectations. Set specific deadlines. Otherwise, you may never get a response. Thinkers do not like to be wrong, and technology can be very complex. When you give them a task, try to avoid making unnecessary changes. If you keep making changes, you will irritate them (though they might not outwardly express their displeasure).

## Strengths of Relaters in Information Technology

Relaters are outstanding listeners, and their decision-making process is consultative. This collaborative process can be valuable when you need to get buy-in from many people when you are making a decision about creating an IT strategy or selecting hardware (or software). They are very interested in the impact of the solution and how it will affect the entire organization.

## Weaknesses of Relaters in Information Technology

Relaters prefer stability, even when a change would bring about improvement. Relaters often learn to live with a problem rather than making a change. Because IT by its very nature is a change-enabling process, Relaters may have a challenge in dealing with required changes. Because they are slow to make decisions, having a Relater lead a project may draw out decision-making processes longer than necessary.

## Strengths of Directors in Information Technology

The strengths of Directors are leadership and decision-making. They love to make things happen. Nothing happens fast enough for these “change agents”. When time is short and the organization is under business or competitive pressures, a Director, being very goal oriented, is the person to “make it happen”.

## Weaknesses of Directors in Information Technology

The weaknesses of Directors are the same things as their strengths: they are in a hurry and cannot tolerate indecision. A Director should consider having a Thinker create the tactics to implement the plan. This planning process should include a clear timeframe and expectation of the deliverable.

Directors can also come across as being dictatorial. They need to understand that others process information in different ways and rarely attack projects with their level of intensity. Occasionally, Directors need to “let others win” as a means of increasing buy-in, improving morale and accomplishing goals.

## Strengths of Socializers in Information Technology

Socializers love being the center of attention, especially on an important project. No one is better at seeing potential up-sides to new technologies and projects. They also excel at seeing the “big picture”... how technologies may improve, or interface with, other aspects of your business. Once they sell themselves, they will move throughout your organization, using their charm to persuade others to buy-in on the project, and their enthusiasm seems to excite the entire organization. They love the chase and they draw energy from their interaction with others.

## Weaknesses of Socializers in Information Technology

Socializers hate getting involved in details and long-term follow-through, and they also can be disorganized. Some Socializers don't let the truth get in the way of a good story; they have a tendency to exaggerate and/or gloss over facts. Therefore, they may "oversell" a project and set expectations at a very high level. If possible, a Socializer should be paired with a Thinker. The Thinker can handle the details and keep the Socializer focused, and Socializer will keep Thinker from getting lost in unnecessary details.

## What to focus on when creating an Information Technology strategy?

When creating a strategy, it is important to have a Director help create the initial strategy. Their leadership and "Do it now!" attitude are critical in gaining momentum in projects. Directors focus on progress, outcomes and bottom-line impacts to your business. A Director should then pair up with a Thinker to peel back the details and a Relater would help others understand the process for implementing the strategy.

### End-of-Section Activities:

1. Does your business plan have a technology component?
2. Do you have a trusted technology advisor who can help you sort out what technology can work in your company?
3. Does the information technology installed in your company do what you need it to do? If it doesn't, what needs to be changed?
4. Do your IT team/vendors understand how to apply technology to solve your business problems?
5. Are you happy with your technology vendor's performance and customer service? If not, what would you like to do about it?
6. Do you have and track software licenses for all users? Is the process defined?
7. Have you implemented project management tools and techniques? If not, why not?
8. Does your company have a technology asset management program?
9. Do you know what percentage of revenue you spend on IT purchases as compared to your competition?

## Information Technology Assessment

Information technology is the application of computer systems, tools, software and project management techniques to solve business problems, drive out costs and increase productivity. Please rate your use of information technology:

Information Technology	Not Applicable	Strongly Disagree	Disagree	Agree	Strongly Agree
Information technology does exactly what you need it to do. If you picked agree or strongly agree, you can stop right now!					
Your IT employees understand how to apply technology to solve your business problems.					
Your IT purchases support your business plan.					
You own and can track software licenses for all users.					
You have implemented project management tools and techniques.					
Your projects are consistently delivered on time and within budget.					
Your IT vendors are performing to your expectations.					
You know precise percentage of revenues you invest on IT purchases?					

Are your IT projects designed to:

- Create or maintain a competitive advantage?
- Maintain your existing market position?
- Necessary to stay in business?

If your answers were “strongly disagree” or “disagree” in any area, then there is room for improvement in how IT supports your organization. If most of your projects are “necessary to stay in business” or “maintain your existing market position,” there could be room for improvement via implementing IT as a competitive tool in your industry.

A good book to help you understand the impact of not managing your IT assets is **Modern Pirates**: The only resource for protecting your company from the software police & copyright cops by Alan L. Plastow.

**“Nothing happens until somebody sells something.”**  
— Arthur H. “Red” Motley

## Sales

Sales represent the lifeblood of every business. No sale, no money ... game over.

To start the sales chapter, we'd like to share some thoughts for you, the business owner, to consider:

- There are certain types of behaviors that great salespeople exhibit:
  - They are natural “people” people
  - They enjoy interacting with others
  - They are enthusiastic and expressive but can also listen empathically
  - They are inquisitive problem-solvers
  - They take an active interest in others’ success
  - Interacting with others boosts their energy level
- Here are a few quick indicators that you, personally, should not be selling for your company:
  - A prospect calls and your pulse does not quicken
  - You make a large sale and you don’t “celebrate”
  - You find interacting with prospects and/or customers on a regular basis drains you of energy
  - You get frustrated when prospects ask too many questions about your products or services

There is absolutely no harm in admitting that you are not born for selling, and even if you believe this to be true, you still have many attractive options. You could hire a salesperson, you could ask manufacturer representatives to take on your line, or you could change your attitude about selling.

If you have a negative view of salespeople, perhaps you have the wrong picture of what “selling” *really* is. Many of us still picture the image of the door-to-door, fast-talking “oily” guy who refuses to take “no” for an answer.

This perception of being in sales is no longer valid, though you may believe it is true.

Today, great salespeople listen more than they talk, and they ask intelligent questions. They help their customers solve problems. They are masters at helping prospects find people, products or services that make their lives better or make their businesses more profitable. They make friends and earn respect. If they cannot create a “win-win” relationship between their company and each prospect, they stop the buying/selling process and wait until the situation changes. They are honest and honorable.

People who learn to sell like this are proud to be a professional salesperson, and they should be. Make a decision today either to become that type of sales professional, or to have your company represented by people just as we described.

The way in which your company approaches sales should vary in accordance with the “environment” in which your products and/or services are bought and sold. In our experience, we have encountered three common selling environments:

1. *Transactional Products and Services:* The customer is making a low-dollar/low-risk purchasing decision. Examples may include a majority of retail purchases and some business-to-business transactions (office supplies, printing, temporary employee placement, common parts and supplies for office equipment, etc...)

2. *Long-Cycle Products*: The purchaser is making a big decision and is applying a buying process. Examples may include big-dollar capital equipment, complicated software, buildings, etc.
3. *High-Trust Services*: The client is deciding to hire a person or company who will be providing “invisible” services. Examples may include legal, accounting, consulting, etc.

To help you, we will touch upon each selling environment, but we cannot drill down into complete detail to teach you how to walk your prospects through each buying cycle. We recommend that you read “The Platinum Rule... for Sales Mastery” (by Dr. Tony Alessandra, Scott M. Zimmerman and Dr. Mick La Lopa) if you wish to learn about the five phases of the buying cycle and how to keep in rapport with buyers of the four behavioral styles throughout the process.

Whatever sales methodology you choose to master (and we recommend learning more than just one), look for these criteria:

- Must be needs/opportunity-focused from *the prospect’s* point-of-view
- Should teach you how to read and adapt to different behavioral styles
- Should teach you how to stay in rapport with people throughout the entire buying process
- Should allow for integration with other selling methodologies

Your natural behavioral style should play a large role in your decision about whether or not you invest your valuable time in selling for your company.

Here is a quick snapshot of the four styles and how each may do well (or struggle) in each selling environment:

### **The Director Salesperson**

If you are (or someone you know is) a Director salesperson, the natural tendency is to launch rather quickly into a sales presentation. You get right to the point by telling your prospect the bottom-line benefit of using your product to provide a solution. Your natural tendency is to spend little time on chitchat or getting to know your prospects ... unless it’s required to get the sale! Directors move quickly, and if a prospect does not see the benefit of their proposal, they move on to the next prospect.

Directors have a fast, efficient manner and total focus on goals that make them more comfortable than most people with cold calling. They are able to tolerate negatives as a necessary part of the sales process. Their bottom-line orientation fits their focus on products or services, which adds efficiency to their customer acquisition processes. Directors tend to sell by painting a convincing picture of the benefits of their product or service.

Their best “fit” is with standard products or services where a match can be determined. Products or services requiring lengthy tailoring, customization and/or development (such as complex computer, communication or consultation systems) try their patience. Directors prefer sales processes where quick decisions can be made based on rational, concrete, reality-based data. Directors often like working with products that fill a recognized need rather than in areas where expectations and opportunities have to be developed in conjunction with each customer.

Director salespeople are very careful about time ... especially their own! They tend to make specific time appointments and arrive punctually. They are clear about their desired results from customer contacts and quickly present the features and benefits offered by their product or service.

As a rule, Directors would excel in transactional selling, fare moderately well in long-cycle selling, but probably struggle with high-trust selling (where building relationships and trust over long periods of time is key).

### **The Socializer Salesperson**

The Socializer salesperson has a positive attitude, is enthusiastic and optimistic, and has a natural orientation toward people. These attributes provide them with a head start in the sales process. Socializers are excellent at making contact, networking and socializing. They tend to get bored easily. Their best sales situation is one that gives them an opportunity to meet and greet a lot of people but does not require a lengthy needs analysis or negotiation process. Examples of products that fit this natural style are real estate, cars, office equipment and club membership sales.

Socializer salespeople like situations that give them a lot of freedom and provide variety and fun. The Socializer salesperson puts special emphasis on appearance and looking prosperous and successful. The Socializer tends to have the newest cell phone, stylish clothes and other symbols that say, "Hey, look at me!" They excel when the product or service they are selling brings happiness to their customers. They especially like to be involved with products or services that help their customers look good: clothes, beauty services, jewelry and status symbols such as fine art, yachts, or private airplanes.

With their creative minds and advanced communication skills, Socializers are great at painting mental pictures for customers. They may use sentences that begin with, "Just imagine yourself ..." or "You'll be the envy of your neighbors when ..." They tend to be the best of the four styles for generating a long list of corresponding benefits for every feature offered by a product or service they are selling.

The Socializer salesperson is an oddity in some respects. Although they will take the time to know the customers' personal likes and dislikes, as well as readily share their own, they may forget their names, birthdays, the college they attended, and so forth. This is not because they don't care (they have every intention of remembering and doing all these things), but once they move on to the next person, they often forget the intimate details of the previous customer to better focus on the opportunity at hand.

Using customer contact software is a terrific idea for helping Socializers leverage short-term knowledge about each new relationship. It is also critical that Socializers embrace any method of staying in meaningful contact with prospects and customers over long periods of time. In general, Socializers struggle with details and follow-up, so leveraging technology is an imperative for a Socializer to enjoy a long and healthy career in sales. In fact, the Cyrano Marketing System was invented by a "recovering Socializer" who was embarrassed by his inability to follow through consistently with his prospects (Cyrano was invented by Scott Zimmerman).

As a rule, Socializers would excel in transactional selling, struggle in long-cycle selling and do moderately well in high-trust selling (if they can curb their impulse to talk too much and follow-through consistently).

### **The Thinker Salesperson**

The natural style of the Thinker salesperson is to provide the prospect with lots of precise facts and logical information. Because Thinkers are not relationship-oriented, they perform best in sales situations involving technical, faster-moving products, where buying decisions are based primarily on technical capabilities. Thinkers work well with professional buyers, as they tend to give them an organized, logical presentation without spending time on small talk.

Thinkers take the time to understand the needs of the customer, as well as the process in which the product or service is expected to perform. Their proposals tend to emphasize the technical features and superiority of their product or service. Thinkers try to provide a “bullet-proof” solution for their customers and are often surprised if the purchase decision is made on a basis that is not completely “rational.”

Thinker salespeople are painstaking information gatherers, and they carefully piece together the needs of the customer and the requirements of the organization before presenting a solution. Their natural style is to depend on their ability to provide solutions rather than focusing on the interpersonal relationships. They prefer selling scenarios where they can analyze a situation and map out a solution, but leave any training, installation or follow-up to someone else.

As a rule, Thinker salespeople would struggle with transactional selling, do very well in long-cycle selling and have moderate success in high-trust selling.

### **The Relater Salesperson**

The natural style of the Relater salesperson is to build relationships and to progress slowly and steadily through the sales process. They are very concerned with maintaining the relationship and making sure that they have the best possible solution for their customer. They spend a lot of time getting to know the customer personally and seek to understand their personal preferences and dislikes. They also use their listening talents to get an in-depth picture of the customer’s needs and wants.

The Relater’s ideal sales position is one that requires strong customer relationships and a service orientation. Systems or services that require months (or years) of repeated, incremental work to respond to known needs (and involve the same decision-makers) are perfect for the Relater. Relaters maintain relationships with high levels of service, personal involvement and attention to details.

The Relater salesperson seldom pushes for a close ... or seldom needs to. Through their painstaking needs identification process and emphasis on knowing and understanding their customers, getting the customer’s commitment flows out as an almost evolutionary part of the sales process.

Relaters are most successful dealing with systems or products that allow them to interact with relatively few prospects and spend a longer period making sure the product solution fits for each prospect. They tend to provide their customers with lots of data as well as input about the purchase decision. They enjoy sales or service work that requires a team approach.

There is one weakness of the Relater as a salesperson: While it is true that their greatest strength is reading others, this can get in the way when working toward confirming a sale. They become worried about applying too much pressure or what may happen to the customer after the sale. They ask themselves, “What happens if the customer does not like the product or service that they bought from me? I would feel just terrible if they were not completely happy.” This issue is one that a Relater salesperson must learn to deal with to become more successful.

As a rule, a Relater salesperson would struggle with transactional selling and could achieve some level of success with both long-cycle and high-trust selling (if they could ask for the sale).

### **Adapting Your Behavior Pays Big Dividends**

Regardless of your natural style, if you learn to adapt your behavior for your selling environment, you can excel at selling your products and services.

If your environment is transactional, try to act like a Socializer/Director combination. Engage prospects quickly with a Socializer's wit and charm, but let rejection roll off your back with a Director's focus on achieving goals.

If your environment is long-cycle, try to act like a Director/Thinker combination. A Thinker would demonstrate logic in his or her questioning and would not rush the educational process, but a Director would not shy away from the challenge of asking for the order when all the benefits have been discovered. This is a powerful combination for building trust and gaining commitment from a prospect that is facing a big-dollar spending decision.

If your environment is high-trust, try to act like a Relater/Thinker combination. A Relater's slow-paced, low-pressure approach would disarm a prospect and build an emotional connection. A Thinker would demonstrate logic and build credibility, thus appealing to the intellectual side of the decision-making process. Since the prospect cannot "shop" invisible services, the decision will be made primarily on an emotional level. However, there is no harm in helping them rationalize their emotional decision by also appealing to their intellect.

Here's a more in-depth view of the four behavioral styles in the three selling environments:

### **Transactional Selling**

Direct people (Socializers and Directors) often excel in Transactional Selling; indirect people (Thinkers and Relaters) struggle. Transactional Selling requires a high tolerance for rejection, the ability to present and close at a fast pace and the ability to juggle multiple tasks on a daily basis. The ability to think quickly on one's feet is an asset for Transactional Selling. The ability to build and maintain dozens (or hundreds) of business relationships (but not on a deep level) is a requirement for Transactional Selling success.

Directors would naturally excel in this environment because they are fast-paced, goal-focused and handle rejection well. To succeed in Transactional Selling, one must be able to hear a lot of "No, thank you!" or "We already have a supplier for \_\_\_\_\_" responses. However, this environment is the very reason why Scott Zimmerman invented the Cyrano System (covered in the chapter on marketing). Long-term follow-up is essential for making easy Transactional Sales, because you never know when their current supplier will do something to lose the account.

Socializers also thrive in transactional selling because they are enthusiastic presenters, are memorable and can often make buying ordinary items fun. Socializers who learn that rejection is not directed at them personally become all-stars in Transactional Selling. Mix in a follow-up system that increases their visibility and allows them to connect with hundreds of people, and you have the model of a "Transactional Selling Hero."

Hearing, "No thank you!" from a prospect usually means, "I'm in the middle of something, and I don't really care where we buy our \_\_\_\_\_s, so I really don't want to hear a sales pitch about how good you are about delivering your \_\_\_\_\_s."

Who can blame them?

There is nothing sexy, unique or exciting about placing a re-order for letterhead or requesting an office temporary for a couple of days to answer phones. Salespeople who contact many prospects (repeatedly) are often rewarded with business because they find themselves in the right place at exactly the right times to stumble across an order. Additionally, if you are calling on smaller businesses, you will find that the purchaser of Transactional Products does perform this duty on a part-time basis; it is not the main focus of their job.

Buyers of Transactional Products usually seek reliability and convenience when making purchases. Demonstrate that you can provide these, and you'll see your sales increase.

Prospects rarely have an emotional attachment to suppliers of low-cost “commodity” types of products, so it is fairly easy to snatch up crumbs that lazy competitors leave behind.

Finally, there is nothing wrong with flat-out asking for a trial order during a sales call. “I could tell you that we turn orders for business cards in half the time that your current vendor does, but I’d much rather show you,” was a statement Scott made to a purchasing agent for a manufacturing company. She threw a \$42 order his way to test him. Scott’s company delivered the order to her desk *the next day*, and that small order led to \$90,000 in printing and design work over the next two years.

In contrast, Transactional Selling would be a poor use of time for Relater and Thinker entrepreneurs.

Prospects would find your slow-paced method of describing your products and services frustrating. They don’t have time to invest in learning all the details about your company, your benefits or anything else related to making simple purchasing decisions.

Transactional Selling success requires fast-paced, fast-thinking, expressive people who can juggle many tasks with ease. This is the only selling environment where your products could still sell in spite of a poorly trained salesperson. If the benefits afforded from the products or services are overt, the prospect may decide to buy (as long as he or she won’t have to deal with the salesperson on a long-term basis for service or training).

### Long-Cycle Products

Guarded people (Thinkers and Directors) often excel in selling products that require a long buying process. In contrast, open people (Socializers and Relaters) would struggle. Long-Cycle Product Selling focuses the attention on the benefits and outcomes that the product itself could provide the prospect.

Because Guarded people stick to an agenda during conversations, they rarely distract from the educational process required to help prospects make intelligent purchasing decisions regarding high-priced products. They also stick to their promises about honoring time commitments, and this builds trust. In addition, they follow through well and this, too, builds even more trust.

In contrast, Open people focus on relationships and feelings and are known for letting their conversation digress. Purchasers requiring a lot of data and information about the product would find it frustrating to buy from an Open person. Letting focus wander during the selling/buying process is a sure way to erode trust. More important, introducing personal issues into a conversation with a Guarded, detached buyer will create tension in your relationship. If you are an Open person, learn to keep your conversations focused on business, and never be the first one to bring up personal feelings or stories. Although it may be difficult, strive to keep business separated from your personal life, and find your friendships outside your selling environment.

### High-Trust Services

If ever there were a situation when the axiom “People buy from people they like” were true, this is it. Indirect people (Thinkers and Relaters) have an advantage in selling High-Trust Services. To understand this more clearly, think of yourself in your current role as a business owner (who needs legal or financial advice) and think about the behaviors that a prospective attorney or an accountant might exhibit to earn your business.

Would you respond positively to a fast-paced, aggressive person? Not likely.

How would you respond to a slower-paced, calm expert who asked you insightful questions? Most of us would respond positively, without a doubt.

Because making a decision to hire someone for his or her services is almost completely a “gut” decision, your behavior will make or break your success. Your prospects cannot “shop” your service against four or five others and make a logical comparison before buying. This isn’t like lining up cars and comparing features and benefits. You are asking someone to *trust* that you and/or your company will provide the services that he or she needs to solve problems or seize new opportunities. Should you fail to deliver, there is no product to return, and the client will be left holding the bag.

Reducing tension and building trust are the keys to selling High-Trust Services well. By acting like a Relater, you will appeal to the prospect’s emotions and form a “connection.” Relaters listen empathically, and this is the strongest attribute to converting prospects into clients.

As Dr. Alessandra correctly preaches, ***“People don’t buy when they are made to understand, they buy when they feel understood!”***

Truer words were never spoken, especially when it comes to investing in professional services. The better you get at connecting with people, getting them to open up to you and building trust, the more people will ask to buy from you. Relaters are great at connecting, exploring and collaborating (the first three phases of selling taught in “The Platinum Rule... for Selling”). Mastering these skills makes it easy to gain commitment from prospects.

By also demonstrating logic, as a Thinker, you will put the prospect at ease as he or she envisions you delivering your services.

Combining both observable behaviors, and never rushing the relationship-building process, is a consistent winner for selling High-Trust Services.

To learn more please read The Platinum Rule for Sales Mastery by Dr. Tony Alessandra and Scott Zimmerman.

## Every Company Should be a Market-Driven Company

### Marketing

“Marketing” is a nebulous term, at best. Ask 10 business people what they think it means, and you’re likely to get nine or 10 different answers. Due to the limited space available in this book, we will only be able to touch upon some highlights and speak in terms of generalities.

Business-to-business (B2B) marketing is completely different from traditional business-to-consumer (B2C) marketing. B2B marketing is one company attempting to gain sales entry into another company. B2C marketing consists of companies attempting to get consumers to buy their products.

As this book primarily targets businesses attempting to sell to other businesses, we will place most of the emphasis on B2B marketing.

We define B2B marketing in the following terms:

- Activities designed to create awareness of your company, your products, your services, your differentiation and/or the value that you deliver to your customers
- Activities designed to create qualified selling opportunities
- Activities designed to cross-sell other products/services to existing customers
- Activities designed to deepen the loyalty your customers feel toward your company and/or your staff
- Activities designed to increase referrals
- Activities designed to convert prospects into customers
- Activities designed to convert customers into Apostles

Many business owners mistakenly assume that marketing “sells.” This is not true, and attempting to create marketing messages that “sell” to the reader can often create feelings that are the exact opposite of the intended reaction. Good marketing messages engender trust, offer something to help the reader solve a problem (or capitalize on a new opportunity), and should communicate the value that *the outcomes* of working with your company deliver to your clients.

Selling is accomplished face-to-face, one-on-one, **not** from a prospect reading a brochure, mailer, newsletter, e-zine or print ad. People still buy from people, and this will never change. Marketing should play a key role in creating more—and more qualified—selling opportunities.

Our marketing methodology consists of a mix of demographics, psychographics, psychology and leveraging technology. Directors and Thinkers will naturally excel in determining demographics of clients and prospects but will have to work to master psychographics (the softer “people” side of evoking emotions and identifying the psychological make-up of ideal prospects). Conversely, Relaters and Socializers could benefit by focusing on demographics and leveraging technology to their advantage. This chapter serves to clarify these areas and educate you about best marketing practices that we have embraced at our company.

Details regarding one-to-one marketing, new technology and proven psychology may be learned in our upcoming book: “The Platinum Rule... for Marketing.”

### Demographics and Psychographics ... finding a mix in your marketing

Traditional marketing focused on “left-brain” activities: sorting through demographics, database information, tactics and strategies of advertising, branding, positioning and lead development. Although these activities are

important, they are not the “end all” for effective B2B marketing. Today, smart companies are creating more detailed profiles of their ideal prospects ... well beyond the “statistics” of the businesses they are targeting.

**Demographics** will provide you with statistical information about your customers and prospects. Directors and Thinkers focus on demographics by default. Here are a few examples of demographical information:

- Size of company
  - Annual revenue
  - Number of employees
  - Market share
- Location(s) of company
- Industries they serve
- Structure of management
- Products they produce and/or services they provide

**Psychographics** focus more on the intangible aspects of the *people* within the company that you are targeting. We have discovered that different people will buy the same product or service but each for entirely different reasons. Naturally focused on people and feelings, Socializers and Relaters have an edge when it comes to mastering the intricacies of psychographics. Getting inside the mind (or the heart) of each prospect is the essence of true “one-to-one marketing.”

Here are a few examples of psychographics that we use when matching messages to our database:

- Position(s) they Occupy
  - Owner, president, CEO
  - Business Development
  - Marketing manager
  - Sales manager
  - HR
  - CFO/controller
  - Sales representative
- Primary Behavioral Style
  - Director
  - Thinker
  - Relater
  - Socializer
  - Unsure
- Secondary Behavioral Style
  - Director
  - Thinker
  - Relater
  - Socializer
  - Unsure
- Preferred mode(s) of Communication
  - E-mail
  - Postal mail
  - Telephone
  - Personal visit
- Values
  - Quality
  - Efficiency

- Service
- Frugality
- Products and/or Services of Particular Interest
  - Product 1
  - Product 2
  - Product 3
  - Service A
  - Service B
  - Service C
  - Service D
- Current competitive/buying situation
  - Has relationship with competitive supplier; needs time to see us as a better choice
  - Has no relationship; not using what we offer, but looking; needs wooed
  - No relationship; doesn't understand what we offer; needs educated

## Embracing New Technology

Leveraging “intelligent databases” (i.e.: *Cyrano Relational Marketing System* ... [www.TheCyranoGroup.com](http://www.TheCyranoGroup.com)) is becoming more common for companies looking to accomplish target marketing, building one-to-one relationships and deepening client loyalty.

Cyrano is a Web-based application that builds a real-time database that contains extremely detailed psychographical information about every prospect, client, colleague and/or referral partner. More important, Cyrano takes action on what it is learning about each contact; sending messages that match behavioral style, need-specific products and services, preferred modes of communication, etc., are now accomplished in a couple clicks of a mouse.

Technology can be amazing, but time has proven that *every* contact management system will fail unless the company using it is building a culture to support the concept. Unless a company is comprised of people who want to build and maintain meaningful relationships with customers, leveraging one-to-one communication technology is futile. We have learned that it is impossible to automate something that has not first been embraced manually.

## Create, Measure and Adjust ... a *Marketing Process*

A key word to keep in mind when thinking about B2B marketing is “process.” Companies that can create a process for targeting, converting, retaining and cloning ideal customers are the winners.

Thinkers have an edge in creating a marketing process but may invest so much time in sourcing the perfect technology, proofing and reproofing messages, and questioning every detail, that nothing is ever finished and launched. “Paralysis by over-analysis” is the death knell for any marketing initiative. Thinkers must allow for some “imperfection” when embracing something as “soft” as marketing.

Here are the steps required to build a Marketing Process:

- Brainstorm all competitive advantages your company/product/service provides:
  - Price
  - Turnaround
  - Quality

- Service
- Knowledge
- Technology
- Ease-of-use
- Speed
- Etc.
- List all benefits your company/product/service provides to your customers:
  - Cost savings
  - Time savings
  - Access to knowledge
  - Increase in sales, revenue, etc.
  - Improve morale, esteem, etc.
  - Etc.
- Create an “Elevator Pitch” that communicates benefits to prospects:
  - Who you are
  - Whom you best serve
  - What pains you eliminate
  - How you improve their situation
  - How you are better/different from your competition
  - A compelling reason they can believe what you just said
  - A compelling reason why they should learn more about you or your company
- Turn your elevator pitch and benefits into compelling copy for marketing use.
  - Web site
  - E-mails
  - Brochures/postcards/mailers
  - Stationery
- Match benefits to behavioral style of your prospects.
  - Directors like:
    - Time savings
    - Competitive advantages
    - New technology
  - Socializers like:
    - Time savings and removal of detail/routine-oriented tasks
    - Anything that increases their visibility
    - Features that help them systematize any follow-up processes
  - Relaters like:
    - Security and stability
    - Features that help build teams and involve other people
    - “Complete” packages and/or total training solutions
  - Thinkers like:
    - Proven processes
    - Removal of risk
    - “Complete” packages and/or proven training solutions
- Deliver the messages to your target audience.
  - Gain permission.
  - Deliver messages in preferred medium.
    - E-mail
    - Postal mail
    - Via telephone

- In person
- Match messages to speed of recipients' bandwidth.
  - Directors and Socializers read/buy quickly.
  - Thinkers and Relaters need time to digest and decide.
- Match types of messages to "persuasive hot buttons" of each style.
  - Directors like overviews and evidence.
  - Socializers like testimonials and case studies.
  - Relaters like case studies supported by evidence.
  - Thinkers like evidence supported with data, field-testing and unbiased, third-party testing.
- Define the purpose of each message.
  - Educate about benefits.
  - Build top-of-mind awareness.
  - Build trust.
  - Create a selling opportunity.
  - Cross-sell a specific product or service that matches a need.
  - Cement a relationship (thanking the customer).
- Define your marketing/selling environment.
  - *Transactional*: Your customers can make a buying decision quickly with little risk or investment.
    - Get permission.
    - Implement a "drip marketing" mentality by putting messages in front of the prospect often.
    - Add "value" to your messages to keep prospects reading them.
    - Position your company as either reliable or fun to do business with.
  - *Long-Cycle/High-Dollar Products*: Your prospects will take a long time making a buying decision due to the high cost and/or complexities of your products.
    - Get permission.
    - Implement a product/solution-specific, one-to-one marketing campaign over a long period of time.
    - Position your account rep as a knowledgeable, helpful expert.
    - Keep your messages professional, never personal.
    - Continue marketing process over twice the duration of the typical buying cycle
  - *High-Trust Professional Services*: Your prospects are buying "you"; they cannot shop your services, and there is no product to return. Building and maintaining trust is key.
    - Get permission.
    - Implement a long-term "give-to-get" marketing campaign that sends the prospect information that helps him or her solve (even if unrelated to your service) specific problems or moves them toward a specific goal.
    - Send messages that show you remember them and want to help them (specific articles, tips, invitation to seminars, book reviews, etc.).
    - Let time work to your advantage.
    - Allow the prospect to "discover" that you care about them more than the person who is currently providing the services you provide.
- Leverage Marketing Automation
  - Profile each prospect.
  - Execute one-to-one campaigns that match:
    - Profile
    - Phase in relationships
    - Preferred mode of communication

- Behavioral style
- Selling environment
- Build your personal, professional and corporate “brand” over time.

Overview of marketing by style:

- Directors:
  - May embrace technology quicker than people of other styles. However, they may not invest enough time when researching available options.
  - Will do a good job at creating or buying a turnkey business development process
  - Will do well at the demographic aspects of marketing but need help on the psychographic side
  - Will struggle with impatience on long-cycle and/or high-trust marketing and selling
  - Will excel in transactional marketing and sales
  - Could improve if they allow a Socializer to brainstorm creative messages, allow a Relater to support sales team and allow a Thinker to research technologies
- Socializers:
  - May decide to buy marketing technology so quickly that they don't understand what they've bought
  - Need help systematizing any follow-up process
  - Are the best at brainstorming ideas and seeing benefits of products and services
  - Are good at creating compelling copy
  - Will struggle with long-cycle and/or high-trust marketing and selling
  - Excel in transactional marketing and sales
  - Could improve if they allow a Director to finish campaigns and find a Thinker to help them build a complete, automated system
- Relaters:
  - Struggle to make big decisions regarding:
    - New technology
    - What their messages should say
    - Defining a niche market
  - Are great at supporting salespeople
  - Good at sourcing support information
  - Would do well to outsource most marketing functions
  - Would do well in High-Trust marketing and selling environments
  - Could improve if they allow Directors to make final decisions and find Socializers to brainstorm creatively
- Thinkers
  - May take too long to source right technology
  - May invest too much time proofing and rewriting messages
  - Would do well in building a turnkey system (if they don't over-think each step)
  - Typically embrace automation that eliminates human error (like Cyrano)
  - Would do well in Long-Cycle/High-Dollar marketing and selling environments
  - Could improve by allowing Directors to make final decisions, allowing Socializers to create “rough” marketing messages and allowing Relaters to finalize marketing messages.

Marketing really is a nebulous term. We have discovered that this is so because every business has different “marketing needs” related to their selling environment.

Regardless of your behavioral style, embrace the concept that marketing requires skills of each of the four styles.

- Directors will get the job done.
- Socializers will generate great ideas and they communicate well.
- Relaters will support the sales team.
- Thinkers will create a process.

If you can't adapt your behavior to create a self-sustaining, automated marketing machine, outsource and/or hire the talent and technology to help you:

- Develop effective messages.
- Deliver them to a targeted audience.
- Create more selling opportunities.
- Develop and sustain more relationships.
- Increase customer loyalty.
- Increase referrals and repeat business.

### **Strengths of Thinkers in Marketing**

Thinkers excel in compiling data, creating reports and creating systems. Thinkers do well in determining the correct demographics of targeted prospects. They do well in comparing features, benefits, costs and value when sourcing technology and other marketing resources. Because they are thorough and precise, Thinkers would master both demographics and psychographics. You would do well with Thinkers by ensuring that a complete, end-to-end system was in place to reduce human error in the marketing process.

### **Weaknesses of Thinkers in Marketing**

Thinkers often suffer from "paralysis by over-analysis." While your competitors are miles ahead in getting messages delivered to your customers and prospects, Thinkers are often still planning, researching and analyzing options. Being more intellectually centered rather than feeling centered, they would have a difficult time creating marketing messages that evoke emotion. Thinkers are not natural brainstormers, preferring instead to think through ideas and options before making decisions.

### **Strengths of Directors in Marketing**

Directors are great at making swift decisions. Of all the styles, they will get more done in less time. Whether buying technology, deciding on a logo or finalizing copy and layout of a brochure or Web site, Directors can make a decision and move forward. Of all the styles, they will not waste time sweating over unimportant details. While a Relater or Thinker is worrying if a brochure is perfect, a Director has already created and sent five marketing messages to the audience and created the outcomes he or she desired. Directors are awesome at getting a large project 80%-95% finished ... quickly. They should turn the project over to a Relater or Thinker for finalization while moving on to a new marketing initiative. Also, Directors are very goal-driven and excel at measuring the results of their marketing activities. They embrace change, challenges and risk freely and this helps them in most marketing initiatives. Directors will excel at digging into the demographics but need to work on the psychographical side of one-to-one marketing.

### **Weaknesses of Directors in Marketing**

Directors will make mistakes, no doubt about it. If the project in question requires perfection (no typos in a brochure or sourcing complicated technology), be prepared to ask for help. Directors are the weakest listeners of all styles, so if part of your marketing process includes interviewing clients and/or prospects and listening for suggestions to improve a product or service, you will struggle in this area. Directors are impatient, so be prepared to embrace systems that automate *long-term* marketing/communication functions (like Cyrano).

### **Strengths of Socializers in Marketing**

Of all the styles, Socializers are the most prolific, creative brainstormers. They are exceptionally gifted at coming up with new ideas and communicating benefits in compelling ways. They are good at motivating teams, generating excitement and moving people emotionally. They should be involved in all meetings where fresh ideas are needed. Many Socializers excel at coming up with creative slogans, catch phrases and tag lines. Because of their innate ability to read people, Socializers will do well at mastering psychographics.

### **Weaknesses of Socializers in Marketing**

Socializers often make decisions impulsively. They need to slow down when planning and be checked for accuracy, and may need help following through on plans. Many Socializers change their minds too often and could benefit by surrounding themselves with people (Thinkers and Relaters) who will execute a plan over a long period of time. No one is better at generating new ideas, but many Socializers have difficulty in following through on them. Automating as many tasks as possible for Socializers (it took a “flaming Socializer” to invent Cyrano) is always a good idea.

### **Strengths of Relaters in Marketing**

Relaters do well in tasks and projects that require faithful follow-through. They are great at organizing events (trade shows, grand openings, meetings, seminars, etc.) and coordinating projects. Relaters would also do well acting as internal public relation agents because they stay in contact with members of the media in a friendly, non-pushy manner. Relaters also do well in outsourcing projects (like Web development or getting a brochure designed), so long as they have a system for making/approving small decisions. Most Relaters could nicely balance demographics and psychographics.

### **Weaknesses of Relaters in Marketing**

Relaters often have a hard time making big decisions. Because of an inner need for security and stability, Relaters are very slow to take risks or embrace changes. These characteristics can cause unnecessary delays when finalizing brochures, implementing new technologies and/or moving forward on projects.

## Why is Training Necessary?

### Training

The biggest surprise in this entire research project was the different views discovered about training.

Companies use training to accomplish many different objectives that include:

- Creating a company culture
- Driving cost out of the business
- Defining roles and responsibilities
- Improving productivity
- Allowing employees to make a greater contribution to the organization

According to an international study conducted by Coopers & Lybrands 1996, companies that conduct training gave the following reasons.

- Productivity increases
- Greater workforce flexibility
- Saving on material and capital cost
- More motivated workforce
- Improved quality of final product or service

This same study indicates that training is most valuable when linked to the business strategy, when outcomes are clear and when training needs are supported by good HR practices.

Many companies that support training and are effective at linking training to a specific business strategy implement business processes to reinforce training and create a company culture that advocates training.

This training does not always take place in a traditional classroom setting. It sometimes includes restructuring the business process to utilize an individual's strengths, allowing them to build on existing skills. This allows otherwise marginal employees to fit in and make a valuable contribution. In addition to customizing training to allow a company to capitalize on the strength of the employees, other methods of training are implemented regularly:

- Internet-based training/Computer-based training
- Situational-based training
- Self-paced training

Internet-based training is composed of training that can be taken by the employee at any time that is convenient. As Internet-based training becomes more and more sophisticated, abundant and less expensive, more and more companies will utilize this training tool. Currently, there is a wide range of training available under a wide variety of topics.

Situation-based training is designed to facilitate and conduct realistic, state-of-the-art aviation training exercises for aviation combat units scheduled to deploy to combat situations. Soldiers and civilians are put through a series of situational-based training scenarios using high-tech virtual simulators, advanced communications and integrated operations systems. Other situation-based training programs exist for business coaches, airplane pilots and business executives.

Self-paced training is probably the most popular. People learn at different paces and in different ways. Good self-paced training will recognize this and present the material in ways that give the student the best opportunity

to learn. All of the training styles reflect methods to test the comprehension of the student and offer a review of the material, where needed.

The workforce is changing, the markets are changing and the general population has access to more information than ever before. Continued personal and professional development are needed. Each of us must understand that continued improvement of our existing skills and acquisition of new skills are critical.

Companies that understand this environment of continuous learning can contribute to the effectiveness of the organization and impact the bottom line.

## **Summary**

Education, to be the most valuable, must be linked to the business strategy, have clear outcomes and be supported by good HR practices. Changes in the regional (and global) economy will require a more skilled workforce. Training, in the past, was considered a perk. With the fast-changing world, training takes on a critical role. Training can drive personal and business productivity and be used to change the culture of an organization. Training can no longer be used as a reward system. Training must be implemented in any organization. This can lead to a “learning organization” and can lead to new opportunities.

## **Strengths and Weaknesses of Behavioral Styles in Training**

### **Strength of Thinkers in Training**

Thinkers prefer careers in which they can strive for perfection, creativity and completeness. They make excellent teachers, professors and other professionals where logical presentation of material is necessary.

Thinkers are analytical, persistent and systematic problem-solvers. They are more concerned with logic and content than style. Thinkers prefer involvement with products and services under specific, controlled, predictable conditions so they can continue to perfect the performance, process and results.

Strengths of the Thinker include accuracy, independence, clarification and verification, fine-tuning and organization. They naturally focus on expectations (e.g. policies, practices and procedures), processes and outcomes. They want to know how things work so their own actions can be correct. Their core personal need is for autonomy in controlling the processes involved in fulfilling expectations in moving toward the intended outcomes.

When attending training Thinkers prefer an orderly approach to the material being presented. They are natural observers who ask many questions. The Thinker is a contemplator, examining the pros and cons of any given situation and trying to consider everything.

### **Weaknesses of Thinkers in Training**

Thinkers' need to weigh possibilities and ramifications can cause stress for other (more impetuous) behavioral types, and sometimes Thinkers contemplate a situation until the opportunity slips away completely.

Thinkers' natural orientation is toward objects and away from people. From their perspective, people are unpredictable and complicate matters. With more people added to the formula, the chances of getting unpredictable results increase. Thinkers choose to work with colleagues who promote objectivity and thoroughness in the office. When encouraged to do so, Thinkers can share their rich supplies of information with co-workers who can benefit from their wealth of experience and knowledge.

### **Strengths of Relaters in Training**

Relaters are warm, supportive and predictable. They are the most group-oriented of all of the four styles. Having friendly, lasting, first name relationships with others is one of their most important desires. They have

natural counseling tendencies and are supportive of other people's feelings, ideas and goals. Other people usually feel comfortable interacting with Relaters because of their low-key, non-confrontational nature. Relaters are natural listeners and like to be part of networks of people who share common interests.

Relaters focus on getting acquainted and building trust. They are cooperative, steady workers who function well as team members. They strive to maintain stability and to create a peaceful environment for others. When faced with a change, they need to think it through slowly, systematically and piece-by-piece in preparing for the change. Finding elements of sameness within those changes can help minimize their stress.

The primary strengths of Relaters are their accommodation of, appreciation for and patience with others. They are courteous, friendly and willing to share responsibilities. They can make excellent instructors because of their people focus and desire to follow process and procedures that work.

### **Weaknesses of Relaters in Training**

A classroom setting that addresses the tranquility and constancy that Relaters require is important for Relaters to learn. Relaters have difficulty speaking up and expressing their true feelings, especially if it might create conflict. They appear to go along with others even when they inwardly do not agree.

In fact, Relaters' slow but deliberate pace results from their desire to minimize risk in unknown situations, partially by inclusion of others in the decision making process. Their need to stay personally involved in the detailed aspects of work often makes them hesitant to delegate effectively. They often would rather shoulder more work than inconvenience someone else by asking for help.

Relaters as students require a consistent and methodological approach to the material. They like to feel the instructor cares about them and their success.

### **Strengths of Directors in Training**

When training a Director, it is important to:

- Have controlled timeframes for each module
- Give them control over how they learn
- Get to the point quickly
- Have the facts
- Strive for results
- Make the material pertinent to their job
- Focus on task actions that lead to achieving tangible outcomes

Directors:

- Compete actively in almost everything
- Participate in games or contests to win
- Want to know the purpose of a function

Directors like the opportunity to complete tasks in a creative manner. They are generally viewed as having a high level of confidence, even when it isn't actually the case. The Director is often the first person to arrive in the morning and the last person to leave in the evening. At the extreme, their high results orientation can lead to an overextended work pattern and result in neglect for their personal and social lives.

Directors are often the first person at work to have a new efficiency "toy." They were the first to have a computer, a fax, mobile phone and (of course) a PDA. Saving time is always a priority for Directors so they can accomplish more. When training a Director, be sure to focus on the time and labor-savings activities a Director enjoys.

## Weaknesses of Directors in Training

Directors are probably the most difficult of the four types to train. If they do not see immediate relevance to the job, you can lose them. Once they see the relevance, they can try to take over the class and direct it toward their specific needs.

Directors want to win, so they may naturally challenge people or practices in the process. They accept challenges, take authority and plunge headfirst into solving problems. When doing group exercises, they tend to control the group.

Directors are driven by an inner need to be in personal control. They want to take charge of situations so they can be sure of attaining their goals.

For the Director, some negative traits may include stubbornness, impatience and an appearance of toughness. Directors like to move at a fast pace and tend to become impatient with delays. Directors tend to view others who move at a slower speed as less competent.

Their weaknesses tend to include impatience, intolerance, poor listening habits and insensitivity to the needs of others. Their complete focus on their own goals and immediate tasks may make them appear aloof and uncaring.

## Strengths of Socializers in Training

Socializers are great talkers because they are friendly, enthusiastic and like to be where the action is. They thrive on admiration, acknowledgement, compliments and applause. They want to have fun and enjoy life. Energetic and fast-paced, Socializers tend to place more priority on relationships than on tasks. They influence others by their optimistic, friendly demeanor, and they focus primarily on attaining positive approval from others.

In a training situation, Socializers like a quick pace and tend to think aloud. They enjoy a casual, relaxed environment where their impulses can have free reign. Desk hopping also satisfies their need for companionship. They like to play and mingle as they learn, earn and do practically everything else. The Big Picture is much more interesting to Socializers than supporting details. After seeing the broad overview, they prefer not to personally dwell on specifics. Their enthusiasm helps them generate many ideas, and their tendency to get feedback from everyone around them helps select ideas that have a good chance to succeed.

## Weaknesses of Socializers in Training

In a training situation with Socializers, their weaknesses are too much involvement in too many projects, impatience, aversion to being alone and short attention spans. They become bored quickly and easily. When a little data comes in, Socializers tend to make sweeping generalizations. They may not thoroughly investigate, assuming someone else will do it, or they may procrastinate because redoing something just isn't exciting enough. When Socializers feel they do not have enough stimulation and involvement, they get bored and look for something new ... repeatedly.

Socializers like to be the life of the party. You will often find them in the middle of a circle of admirers. Their willingness to discuss any topic often invites controversy.

## What to focus on when creating a Training Plan?

All training needs to address:

- How it supports the objectives in the strategic plan (if applicable)
- What is the return on investment of the training?
- How will it address the growth path for the individual?
- What policies or procedures exist (or will be implemented) to reinforce what was learned?

Sometimes training has nothing to do with the strategic plan. There is a chance to capitalize on an opportunity, and it just makes sense. In this situation, return on investment is very important. It is necessary to clearly understand the reason for, and expected outcome of, the training.

Training that is mandated by the strategic plan is usually dictated by the business situation. This might include training every employee on the new software being installed or implementing a training program mandated by government or agency regulations.

Sound human resource practices that reinforce what was learned and provide a vehicle to allow the employee to use the recently acquired skill are very important.

**End-of-Section Activities:**

1. Does your company have a training plan in place that is structured to support the business strategy?
2. Is training measured to determine the financial and productivity impact to the organization?
3. How do you measure the impact of training in your organization?
4. Are your employees motivated to keep their skills current? If not, why not?

## Bringing It All Together - Taking Control of Your Destiny

You read about all the different possibilities in moving your company forward. It can be confusing. So where do you start?

There are three principles that are critical to becoming more successful. These are the three considered to be the most important. The first is attitude, the second is business strategy and the third is focus.

Let's look at attitude first. Put aside your ego and engage the advice of quality advisors. Understand that you are not an expert in all fields. Seek out expert advice and trusted advisors and implement behaviors that are necessary for your success. Make the tough decisions and execute on those decisions.

If we had to be specific and tell you what we believe is the most important part of attitude that would have the biggest impact on your business, it would have to be goal-setting. Nearly every section of this book, in one way or the other, discusses the importance of proper goal-setting.

Apply the lessons in this book to your own life. Surround yourself with positive people in a positive environment, people who support you and what you are accomplishing; read positive and motivating material; listen to educational tapes and CDs; and associate with people who have a positive, can-do attitude and are willing to share their experience and expertise.

The single most important piece of advice we can give you is: do something! Don't wait for it to be perfect. It will never be perfect. Only action will take you where you want to be. Just get started!

The second step is to build a business plan. Don't over-think the plan. Use it to get focused and provide clarity and direction to your pursuit. This will help you understand your market and how your product (or service) can solve specific problems, and provide clarity for your unique selling proposition.

Use this plan to focus your efforts. Before you take any action, ask yourself "Is this in my business plan, and will it get me closer to my goal?" If the answer is no, then why do it? If it has to be done, move it lower on the priority list.

Your business plan is your roadmap into the future. A good plan will tell you where and how to spend your time and will provide clarity on the types of activities and opportunities that are most important to you. Your business plan is a living document. This plan allows you to recognize and capitalize on opportunities as they become available.

Remember, a great business plan that sits on the shelf is useless. A marginal business plan that is well executed will take you a long way toward your ultimate goal.

Finally, get focused! If you focus on the execution of your business plan, you will be clear on what is important. You will know when it is time to refuse business. You will have the ability to better identify the risks in a given opportunity. You will know when to engage referral partners and when to do it yourself.

Without the plan, one of the biggest problems we face is that of scattering our resources. You can only focus on and do one or two things well at any given point in time. Your plan should clearly identify what those activities are. Be clear on what you want, be focused on what you want and be disciplined in staying on course.

After you address your attitude, create your business plan and focus your efforts, you will find that you have addressed all the other principles in this book. Spend your time on your attitude, with special attention to

goal-setting, create your plan and stay focused. Know what is important and let the other “stuff” take a back seat. It can best be summarized as paying attention to attitude, strategy and discipline.

Imagine what would have happened if you had successfully applied the principles and practices of *Platinum Rule for Small Business Mastery* 10 years ago ... or even five years ago? Well, hundreds of thousands of people like you have already used these principles and experienced dramatic increases in sales volumes, more satisfaction in their dealings with customers and co-workers (family and friends, also!) and greater awareness of their own strengths and weaknesses. Many people report that they no longer feel like “just a salesperson”; they feel, behave and are treated like a *trusted advisor*. They have an increased ability to help people find solutions to their problems and are more adept at identifying new opportunities.

For you to also share in the pleasure from experiencing these benefits, we encourage you to get started this very minute. First, think about the goals you want to accomplish in the next year... the next month ... the next week ... even by the end of today! Develop a plan to meet those goals using *The Platinum Rule* and the other principles that make up *The Platinum Rule of Small Business Success*.

### Accept the Challenge

This first step requires your *personal commitment* to this challenge and *belief* in these principles. Their success is a proven fact, and you can learn to put them to work for you. Of course, any skill takes practice, and you cannot realistically expect to put all of them into effect immediately. However, the minute you start to treat people the way *they* want to be treated, you will start to see immediate results. We encourage you to accept this opportunity to strengthen your business competencies!

### Make a Plan

Once you have accepted the challenge, you need a plan to incorporate these techniques into your business. Although we have provided you with an extremely simple, effective method of identifying behavioral styles, it does take some practice. That is why we suggest you begin to incorporate what you have learned about behavioral styles into your business activities.

### Commit to Growth

“Change is inevitable ... growth is optional.” We love that saying because it’s true. Right now, you have the option to “finish the book” and get on with the rest of your life and career. After all, this is close to the last paragraph. However, you also have the option to take this moment and make a life-changing decision. You may decide to *keep learning* about yourself; your strengths and weaknesses, your natural tendencies to react to both favorable and unfavorable conditions, how you make decisions, how you come across to other people, etc. You may decide to learn more about The Platinum Rule and apply your new knowledge in other relationships of your life ... beyond selling to and servicing the needs of your clients and relationships with your co-workers, children, spouse and/or family.

Hopefully, you may decide to use this book as a jumping-off point for a new direction in your career. If that thought excites you, we urge you to visit our site: [www.celebrating-success.com](http://www.celebrating-success.com) and learn how The Platinum Rule may be applied in all phases of business, including prospecting, networking, marketing, communications, customer service, referral building, client loyalty, hiring, management, leadership, etc. We offer programs, technology, books, CDs, DVDs, Brain-X self-paced mastery courses, speeches and on-site workshops that are all specifically designed to help you apply this amazing concept to key facets of your business.

For free articles, tips, ideas and specific product offers that match your behavioral style, preferences and outcomes you wish to receive, visit [www.PlatinumRuleGroup.com](http://www.PlatinumRuleGroup.com) and opt-in to “One-to-One from A-to-Z,” the world’s first e-zine that is completely customized to your personal and professional interests.

May you walk the rest of your journey full of wonder and awe, and may you make many friends along the way.

Here's wishing you continued success,

Tony, Scott and Ron

## Leadership with Style!

### Enhancing Your Leadership Effectiveness by Increasing Your Adaptability

#### ***Making this chapter meaningful to you***

Picture a Director, Socializer, Relater, and Thinker that used to manage you or someone you currently manage. As you read this section, bear in mind each of these particular people and specify what you can do to improve your relationships with them. Focus on each person's more productive traits as well as each one's less productive characteristics.

We have found a common *universal leadership language* which exists within leadership and management. Whether you are a corporate president, chairman of the board, owner of a small company, a board member, director of a non-profit organization, an independent consultant, small business owner or senior pastor of a church, you can greatly increase your effectiveness as a leader by learning to adapt your leadership style.

All people have their own natural and preferred way of doing things. Directors are the most directive in their style of leadership. Socializers are naturally motivational in the way they go about persuading others and changing situations. The remaining two behavioral types are less assertive by nature and not as pronounced in their leadership styles. Relaters are supportive of others and sensitive to how changes may impact other members of the team. Thinkers are more similar to *self-determined* Directors. The difference is that Thinkers are concerned with achieving their own desired standards in a way that does not cause disruptions to existing systems or business practices.

#### **The Director Leaders**

##### ***Move over and let them do their thing***

They're like wild horses who don't like to run in rigid formation. If you confine them, Directors may become frustrated and stubborn; let them do their own thing and they may very well impress you. Agree on the goal and specify the boundaries of the playing field. Then get out of their way.

You may be best served to ignore some of the Director's natural competitive spirit. Instead, focus energy on a common goal for bettering the organization. Directors seek encouragement and feedback related to goals and progress to function effectively within the general framework of shared expectations. However, don't expect them to follow every procedure to the letter of the law.

##### ***How to develop Directors***

When coaching a Director, he or she likes to learn the basic steps to quickly sift out what they want. "I don't really plan to read this 200 page computer manual just to learn how to set up pages in three columns. Just teach me what I need to know so I can move forward." In the interest of saving time, Directors may try to find shortcuts, so show them the simplest, fastest route to get them to their destination.

The thought of reassuring someone or explaining something more than once fritters away precious moments that the Director would rather spend on action and results; so he doesn't bother with details. Focus on the high points, like what is to be done and by when. The Director wants to know only enough details required to get a contraption to function so he can then turn

to other important new opportunities. This lack of attention to details can result in his searching for new ways to streamline his routine jobs in getting his desired effects more readily.

### ***Who's managing whom?***

Managing a Director is no easy task because he wants to manage you! You can squelch a Director or you can encourage him to take control of certain arenas. Why not work with the Director's strengths by allowing him to take the reins, where qualified, on particular projects? His preference for change and innovation makes him the natural choice for *new frontier* programs where he can implement his own ideas. Make sure the Director understands he needs to check with you at specific intervals, or he may demonstrate the renegade syndrome—doing his own thing, without answering to anyone but himself.

### ***Getting Director's to decide***

Directors tend to make autonomous, no-nonsense decisions. If the decision will help them meet their goals, they go for it; if not, they'll typically pass. One of the few times this type will procrastinate in reaching a conclusion is when it will take too much time or effort to do the homework to determine the best alternative. You can prevent this procrastination by simply providing a brief analysis for each option you present to a Director.

### ***Motivating Directors***

Provide them with options and clearly describe the probabilities of success in achieving goals. "Ross, here are four possibilities for developing the Evans Estate. I've highlighted the key points for each suggestion, and included costs and time projections at the bottom of each one. The choice is yours."

Directors are more likely to thrive in pressure cooker situations. They naturally gravitate toward power positions and career areas where they can take charge: executives, politicians, military officers, stockbrokers, entrepreneur, and newspaper reporters. Think of win-at-any-cost tennis pro John McEnroe. When in doubt, he questions the decisions made by the referee. For better or worse, he deals directly with the source. "It's not how you play the game—it's winning!" And winning, more than anything else, motivates the Director. Just think of Donald Trump, author of *The Art of the Deal* and *The Trump Game*, as one example of this leadership style.

### ***Complimenting Directors***

Mention their achievements, upward mobility, and leadership potential. Omit personal comments and focus on their track record. "Jones, you've exceeded our company goals every month for the past year and have put in more hours than anybody but the top officials here. The CEO has his eye on you for an upcoming vice-presidential slot."

### ***Counseling Directors***

Stick to the facts. Draw them out by talking about the desired results. Then discuss their concerns. Focus on tasks, problems and/or progress more than feelings. Ask them how they would solve the problem. "Anne, we've heard a few comments that need to be addressed. It seems that some of your employees don't feel appreciated for the extra hours they've been putting in for you on the Evans project. They say they've given up social engagements and worked 14-hour days to beat your deadline. How do you think we can bolster their morale?"

### ***Correcting Directors***

Describe what results are desired. Show them the gap between the current situation and the desired progress or outcome. Suggest clearly the improvement that is needed and establish a time when they will get back to you. “We need to streamline communication around here. Last month, we had two separate divisions calling on the same CEO. I want you to work up a plan to keep everybody informed of who's working on what so we don't duplicate our efforts. Get back to me by the end of the week.”

### ***Communicating with Directors***

Be prepared to listen to their suggestions, the course of action they have in mind, and/or the general results they are considering. This enables you to begin on a positive note by indicating the areas in which you already agree. Then you can work backwards toward gaining agreement on the results you both want—and are willing to either mutually or independently enable the other to achieve. “Sarah, this format will give you the freedom to develop your branch your way and still allow Vern and Ellen to structure theirs another way . . . without sacrificing time or morale.”

### ***Making decisions and problem solving with Directors***

Directors want to provide their own initial view of the decision or problem and the process they prefer to follow in reaching a clear-cut, quick solution.

When suggesting a different idea, opinion, or action to them, point out that you are trying to work in ways that are acceptable to them—and also yourself. Focus on your desire to identify solutions which will also meet their expectations. Stress that you don't want to cause difficulties for either of you. “Phil, instead of writing this report off the top of our heads, I'd rather write an outline first and then the report. I know it takes longer initially, but it saves time in the long run because the writing will be better organized and will make more sense to the board.”

### ***When acknowledging Directors***

When it's appropriate to reward or reinforce their behaviors, focus on how pleased you are with their results or progress. Assume they are also pleased with achieving the desired outcome in that situation. The bottom line? Each of you gets better results by combining your energies on a common targeted goal: “Phil, this report turned out much better with your insights and case studies. Now we have something that's interesting, clear, and well organized!”

### ***Delegating with Directors***

Give them the bottom line and then let them do their thing. To enhance their efficiencies, give them parameters, guidelines, and deadlines. “We need to get that mall built a month sooner or we'll lose our shirts. Fourteen tenants are threatening to bail out of their contracts if we don't open 3 weeks from Friday.”

Action Plan . . .

## **WHEN YOU ARE THE DIRECTOR**

- Allow others to perform tasks and projects without excessive or untimely interference

- Participate in groups without asserting your command
- Self-govern your tendency to give orders to others
- Enlist others' input and support through participative, collaborative actions
- Give others credit when they deserve it
- Praise people for jobs well done
- Let colleagues and employees know that you realize it's only natural that people make mistakes
- When delegating, give some authority along with the responsibility

## WHEN OTHERS ARE DIRECTORS, HELP THEM LEARN TO:

- More realistically gauge risks
- Exercise more caution and deliberation before making decisions and coming to conclusions
- Follow pertinent rules, regulations, and expectations
- Recognize and solicit others' contributions, both as individuals and within a group
- Tell others the reasons for your decisions
- Cultivate more attention/responsiveness to emotions

## The Socializer Leader

### *Help them focus their abilities*

With their energy and enthusiasm, Socializers can get so involved with so many different activities that they may accomplish goals with a flourish. Or, they may show flurries of activity, but not actually accomplish things in an efficient manner. Managers and co-workers can help channel that energy and enthusiasm with tactful reminders and hands-on assistance to help them prioritize and organize. Then, the entire office may function more smoothly. Since Socializers tend to be open books, the other types often can detect when Socializers are having off days and give them verbal boosts with a compliment and personal attention.

### *How to develop Socializers*

When coaching Socializers, don't give them too much at once or they'll become overwhelmed. Skip as much of the detailed, boring information as possible. Get them involved. Socializers are typically kinesthetic, hands-on learners, so let them try by first getting a feel for what's involved, and then showing you what they understand, so you can give them structured feedback. Frequently, this type wants to jump in and try before they're ready, or before they fully understand everything. Allow them to save face when they do something wrong, and heap on compliments when they get it right!

### *Prioritizing with Socializers*

Many Socializers find that sorting out priorities and solutions becomes very difficult when too many opportunities bombard them. When this happens, they may become uncharacteristically mute and immobilized . . . temporarily, of course. Other people can help by prioritizing items for Socializers to tackle. "This account needs attention sometime today, but I need your input on the Chase report in less than an hour." This approach enables him to separate his feelings from the facts at hand as well as other's expectations. Ironically, when the

Socializer's tasks become more organized, his anxiety level lessens—despite the fact that he bristles at the thought of organization. More importantly, since he can't be all things to all people, focusing and refocusing on what's most important, second priority, third priority, etc... is essential to his well-being.

### ***Support Socializers' dreams***

Socializers operate predominantly from a multiple-focus, right brain perspective. They see mental pictures first, and then convert those pictures to words. Preferring main ideas and generalities, not details, they base decisions on their impulses, gut feelings, and others' recommendations and testimonials. For this behavioral type, emotions rule. "Something tells me that I should buy this stock." This doesn't mean that they never use logic or facts, only that feelings and emotions get processed first.

Get ready to act more enthusiastic with the Socializer. Show you're interested in him by letting him talk and by using more animation in your own gestures and voice. Illustrate your ideas with stories or mental pictures that relate to him and his dreams and ideas. He likes to interact with people, so try not to hurry your discussion. Include opportunities for small talk and getting personally acquainted.

Socializers like to focus on the big picture. Generally less motivated by facts and details, they respond better to short overviews or capsule summaries of what you plan to cover. Attempt to develop some stimulating, enjoyable ideas together while focusing on supporting their opinions and dreams. (Notice we haven't mentioned goals for Socializers? They typically avoid the details and long-term follow-through on goal setting; they flit from project to project and idea to idea.) Socializers turn off to people who do not support their dreams. Therefore, support their ideas while showing them how they can transfer their talk into actions.

If you disagree, try not to argue because they dislike conflict. You might not win an argument with them anyway because their strong suit is feelings and intuition. Tony often says that Socializers are the only group of people who can win an argument not even knowing what they're talking about! If trapped, they can twist people around through very clever manipulation of feelings with their usage of words and emotions. Try to explore alternate solutions, instead. When you reach an agreement, iron out the specific details concerning what, when, who, and how and document the agreement with them, since they tend to naturally forget such details.

### ***Motivating Socializers***

They like special packages and a little something extra to inspire them to go the extra mile. For example you might tell Hawkins that when he brings in the Babbitt account, "I'll give you an extra week's vacation and take you and Sharon to the fanciest restaurant in town." Or, show them how they can look good in the eyes of others. "When you close your next order, which will be your tenth major success story this year, you can all but clinch the President's Productivity Award and have your name engraved on a plaque next to the big boss himself."

Many businesses use yearly contests to motivate their employees. Socializers tend to sprint toward a quick win—for the first week or two. Then they may say to themselves, "Hey, I have a whole year to win this contest. Why am I working so hard now?" They may further get sidetracked by other things and do nothing more about it until a week before the contest ends. If they can get excited enough, they may win anyway, but the truth is they haven't worked toward the goal for 11 months. How can these types keep up their motivation? Since Socializers like constant rewards along the way, they may favor shorter contests with smaller payoffs, perhaps

culminating in the *big one* when the year ends. One person even jokingly suggested, “How about an *employee of the hour* award?”

### **Complimenting Socializers**

Pay direct personal compliments to them as individuals, when legitimately deserved. “You are a terrific person and a wonderful employee.” Mention their charm, friendliness, creative ideas, persuasiveness, and/or appearance (or better yet, all of the above). While other types respond to more specific job-related comments, Socializers can mentally relive more global generalizations for weeks to come. “We are so lucky to have you with us, Dee. You’re a real gem.”

### **Counseling Socializers**

Give them ample opportunity to talk about whatever may be bothering them. Pay attention to both facts and feelings, but put your primary emphasis on their feelings. Ask probing questions and involve them by asking how they could solve the problem or improve the situation. Sometimes, just airing their feelings and thoughts relieves tension for Socializers. Talking allows them to get things off their chests and can even become an end in itself, since their energy is largely influenced by the quality of their relationship.

### **Correcting Socializers**

When stress hits Socializers, they prefer looking the other way and searching for more positive, upbeat experiences. They avoid problems as long as they can. If the pressure persists, they tend to literally walk away from the problem. When this tactic fails, they may become emotionally candid in attempts to meet their needs. “I can’t believe I let this happen, but I brought it all on myself.” Sometimes stress manifests itself in animated panic. “I can’t talk now, Hal. It’s really hit the fan this time!”

Let these individuals know specifically what the challenge happens to be. Define the behavior that can eliminate it and confirm the mutually agreeable action plan in writing to prevent future misunderstandings. Since they prefer keeping the conversation light, avoid what they view as negative or distasteful approaches. Rather than, “Why did your sales drop off 50% last month?” use more optimistically stated questions like, “How’d you like to bolster your sales up to your normal range and beyond it?” They’d simply rather deal with things going right.

### **Communicating with Socializers**

Be prepared to listen to their personal feelings and experiences, since they have a need to be both expressive and able to share their emotions with others. Their style requires open and responsive interaction with others, preferably in a manner of congenial and unhurried conversation. It’s much like that between long-time friends. “Just between you and me, Chris, I feel very uneasy about Jill and Howard handling this account alone.”

### **Making decisions/solving problems with Socializers**

They’ll want to avoid a discussion of more complex, negative-sounding or otherwise messy situations. It’s difficult for them to feel positive or agreeable with you or anyone else under these circumstances. In making decisions with them, they will be open to your suggestions—as long as these ideas will allow them to look and feel good—and not require a lot of difficult, follow-up, detail work or long-term commitments. “You know just about everybody

who is anybody, George. Since we need to get \$3,500 in pledges for the event by the end of February, why not go ahead and wrap up all your calls by Friday. Then you can relax a lot more next week." When suggesting a different idea, opinion, or action to them, be sure to point out you are doing it that way that is most agreeable to them. Focus on your desire to identify solutions which will also meet their expectations. Stress that you don't want to cause difficulties for either of you.

Above all, offer your suggestions as gifts which can make this situation (task or relationship) easier and more beneficial to them—as well as to other people who you feel are also likely to find this desirable. "You're lucky I'm on the Nominating Committee, Marilyn. So many people wanted the hospitality position that I couldn't manage to hold it for you this year, but I think I've got one that's even better... how would you like to be one of the judges?"

### ***When acknowledging Socializers***

When it's appropriate to reward or reinforce their behaviors, focus on how pleased you are that they have succeeded in finding workable solution to their problem or objective. Additionally, let them know how much you appreciate their openness and responsiveness to suggestions: "George, I'm so glad we could reach a solution that both you and I feel good about. I appreciate your willingness to call prospective donors on Friday afternoon and evening. That's fine with me. This should work out okay and let's compare notes early next week."

### ***Delegating to Socializers***

Again, make sure to receive clear agreement. Set up check points/times to avoid long stretches without progress reports. Otherwise, Socializers may lapse into their natural way of doing things—spontaneously completing particulars which feel best while postponing less stimulating tasks; especially those that involve follow-up and checking.

Socializers exhibit a natural talkativeness and ease with people. This makes them logical choices for maintaining group morale and motivation. They think out loud and enjoy participating in brainstorming sessions, so why not get their opinions and assistance on recognition awards, entertainment, or fund-raising activities? They want to fill their natural need for recognition, so activities which draw attention to themselves have appeal.

Socializers are often concept people who come up with plenty of ideas, but not necessarily the means of carrying them out, so steer them toward resources to help implement those ideas. "Olivia, this proposal for the King Company looks good so far, but how about including more direct benefits for each employee. Marian has surveys filled out by each employee. Get together with her, bounce some ideas around, and then include more essential information about the key people in your proposal. Add some extra *plus points* on the others . . . 12 pages in all. In this manner, you should do the job very well. Oh, and Olivia, thanks for making the extra effort on this project. It's really important to all of us."

In this example, the manager praises the work done so far, tells Olivia where to go for more facts, encourages a participative exchange between Olivia and Marian, spells out the parameters (12 pages), and shows her the path for staying on track. He's utilizing this Socializer's natural strengths and allowing for her potential weaknesses. Instead of delegating someone to perform large tasks that are naturally stressful for them, why not structure the tasks to fit the natural work style of that person? As one bumper sticker we spotted on a passing car advised, "Never try to teach a duck to whistle. It's a waste of time and it annoys the duck."

Action Plan . . .

## WHEN YOU ARE THE SOCIALIZER

- Attend to key details, when appropriate
- Improve your follow-through efforts
- Monitor socializing to keep it in balance with other aspects of business
- Write things down and work from a list, so you'll know what to do and when to do it
- Prioritize activities and focus on tasks in order of importance
- Become more organized and orderly
- Get less appealing tasks over with first (delayed gratification)
- Pay more attention to time management of activities
- Check to make sure you're on course with known tasks, projects or goals

## WHEN OTHERS ARE SOCIALIZERS, HELP THEM LEARN TO:

- Prioritize and organize
- See tasks through to completion
- View people and tasks more objectively
- Avoid overuse of giving and taking advice (which can result in lack of focus on task)
- Write things down
- Do the unpleasant tasks as well as they do the *fun things*
- Focus on what's important now
- Avoid procrastination and/or hoping others will do things for them
- Practice and perfect, when appropriate

## The Relater Leader

### *Encourage them to update their methods*

Relaters contribute stability and perseverance to their workplace. Since they work toward harmony in the office, they usually fit comfortably into the work environment, but they may become used to applying the old methods over and over. Their procedures may often include steps that were necessary when they learned the procedure, but may now be discarded. They could improve their work practices by utilizing shortcuts that eliminate extra steps; Directors and Socializers could help them with this. If asked, Thinkers could demonstrate new ways to accomplish tasks.

### *How to develop Relaters*

When he's in training for a job, a Relater favors one-on-one, hands-on instruction... starting at the beginning and ending at the end. By learning each step, he generally is more comfortable with his functions. During training (and in other new situations), the Relater tends to observe others for a longer than average time. When he feels he can do a task, then and only then will he comfortably begin. This slower pace can frustrate Directors and Socializers, both of whom like to plunge right in with, "Oh, sure! I can do that," whether they've done it before or not! So understanding that Relaters need to do things slowly can reassure the more direct, faster-paced types that the job will get done.

Get ready to be ready with the Relaters. Have a step-by-step list of procedures or a working timetable/schedule at your disposal. Relaters need to feel secure in their mastery of procedures until their actions become *second nature* and more routine. At the same time, they prefer a pleasant and patient approach while they learn what is expected of them.

### ***Motivating Relaters***

Besides thinking they can learn to master a series of procedures, Relaters like to also feel that their relationships with others can benefit from their predictable follow-through. "If you can learn to use this computer by next week, you can send the whole Christmas mailing for Mr. Hawkins on Monday. Then he can go to Texas for his family reunion." Or, show Relaters how to strengthen their relationships with others. "When this office makes its 1000th sale, it can win the Outstanding Division Award for the year. And you, Arthur, can help that happen by getting Bob to understand this new spreadsheet containing relevant data."

### ***Complimenting Relaters***

Mention their teamwork and dependability. "Pam, besides staying on top of this project for two years, I really appreciate the fact you've encouraged everyone else to do their part. We couldn't have done it without you." Or remark about how others regard them, how well they get along with co-workers, and how important their relationship building efforts have been to the company. "Stephen, you've been the glue holding this place together for the last 20 years." Stick to praising what they've done rather than more abstract, personal attributes. Otherwise, their modesty and your vagueness may cause them to dismiss your comments.

### ***Counseling Relaters***

Allow plenty of time to explore their thoughts and feelings so you can understand the emotional side of the situation. Relaters usually express their feelings less directly, so draw them out through questioning and listening responses. Bear in mind this type tends to balk at sudden change; regardless if the change is good or bad. The key point is that their stability-motivated state is disrupted by the unknown. You can help reduce their fears by showing how specific changes will benefit them and their company. "Barbara, moving to Dallas will be an adjustment for all of us at first, but 80% of our staff has agreed to go. The company will move you and your family, help you sell your house, and give you a 10% bonus for loyal service. We like to take care of our own, and you are a valuable, trusted employee. And besides, you'll still be with many of the same friends, co-workers, and the company you've always been with every day here at this office."

### ***Correcting Relaters***

Reassure them that you only want to correct a specific behavior. Relaters tend to take things personally, so remove the *something is wrong with you* barrier as quickly as possible. Don't blame or judge the person; keep the conversation focused on specific behavior and its appropriateness. If the problem involves a procedure, help them learn how to improve it. Point out in a non-threatening way what they're already doing right while also emphasizing what needs changing. "Norma, I admire your persistence on this proposal, but we have to add more details to the inventory and shipping sections before we send it out. For example,..."

### ***Communicating with Relaters***

Be ready to do more talking than listening with them, since they don't naturally feel comfortable when the limelight is focused on them. You will want to clarify any key agenda item with them, working to stay organized and moving forward steadily but slowly as you check to make sure they both understand and accept what is being said: "Did you want me to stick around the office at a particular time each day in case you need to telephone me for emergency questions on this account, or do you want me to call you?"

### ***Making decisions and solving problems with Relaters***

In dealing with problems and decisions with this type, make sure to deal with only one subject or situation at a time, one step at a time. Gain clarity on each point before moving on to other items, and make

sure they are ready, willing, and able to do so. They need stability, so deal with matters calmly and in a relaxed manner. Encourage them to share their suggestions about coming to mutually-agreed upon decisions that promote stability, ensure completeness or reduce risk: "Would you mind writing down a schedule of your office's activities so I can get my proposal written up without missing anything?"

When suggesting a different possibility to Relaters, point out how you are trying to identify ways that you can help continue to make things pleasant for them. You simply have an idea or opinion in this respect which will also help stabilize your own relationship expectations with them and which is important to you, too. "I know that we initially agreed on 10 phone calls per day, but some of our volunteers are unable to make that commitment. Would you be comfortable making 15 calls a day if those calls included your personal friends and family?"

### ***When acknowledging Relaters***

When it's appropriate to reward or reinforce a Relater's behavior, focus on how you genuinely and sincerely appreciate their willingness to make things work for you (and others) within the organization. Approach matters in a systematic, low-keyed and understated manner. Point out how you noticed they make important contributions when they take the initiative to share their own ideas, interests, and insights in helping make sure results are achieved. "Just say anything about the impending merger that you want to share. We certainly don't want to use any high pressure tactics. John, thank you very much for your willingness to provide us with this information as it makes our decision so much easier."

### ***Delegating to Relaters***

Relaters may be reluctant to ask others to do their own fair share of the work. You could make a personal appeal to their loyalty and sense of sportsmanship: "Al, you're an example for this company of genuine cooperative spirit. Your staff wants to please you, so by giving everyone in your department just 10 of those names to call, you should all reach the goal together by noon tomorrow. Otherwise, you'll probably have a lot more difficulty reaching all those people by the target date."

Give them the task, state specific deadlines that need to be met, and explain why it's important to do it a certain way: "I'll need 500 copies of these summaries printed and collated by 5 p.m. today. Mr. Jeffries is getting back from New York two days early and he needs them by 8:30 tomorrow morning for a meeting with one of our largest clients."

Action Plan . . .

## **WHEN YOU ARE THE RELATER**

- Stretch by taking on a bit more (or different) duties beyond your comfort level
- Increase verbalization of your thoughts and feelings
- Speed up your actions by getting into some projects more quickly
- Desensitize yourself somewhat, so that you aren't negatively affected by other's comments (to the point of affecting your own performance)
- Learn to adapt more quickly to new changes or refinements of existing practices
- Bolster your assertiveness techniques

## **WHEN OTHERS ARE RELATERS, HELP THEM:**

- Utilize shortcuts and discard unnecessary steps
- Track their growth
- Avoid doing things the same ways over and over
- Focus on the goal without attending to other thoughts or feelings

- Realize there is more than one approach to tasks
- Become more open to some risks and changes
- To feel sincerely appreciated
- Speak up and voice their thoughts and feelings
- Modify their tendency to do what others tell them
- Stand and accept credit and praise, when appropriate

## The Thinker Leader

### ***Help them substitute quality for perfection***

Since this type is characterized by the most complex thinking pattern, they base their decisions on proven information and track records. They want to make rational choices based on facts, not on other people's opinions or testimonials—unless those people are the Thinkers' personal heroes or experts within their field. Even then, they'll probably want to see evidence in writing. When a Thinker says, "I need to think about it," she usually means it. You can help her make a decision by supplying the materials she requests and by allowing her the time to make the right decision. Focus on emphasizing deadlines and parameters so the Thinker can build those timeframes into her procedures.

### ***How to develop Thinkers***

When coaching a Thinker, point out the most important things to remember first. Then demonstrate the procedure in an efficient, logical manner, stressing the purpose of each step. Proceed at a relatively slow pace, stopping at each key place in the process to check for his or her understanding. Ask for input, especially regarding desired refinements (which may uncover a better way to accomplish the task). This approach ensures success with the task and minimization of stress for the Thinker.

### ***Motivating Thinkers***

Appeal to their need for accuracy and logic. Thinkers do not respond positively to fancy verbal antics, so keep your approach clear, clean, and well documented. Avoid exaggeration and vagueness. Show them why and how \_\_\_\_\_ is the best available option: "Ms. Alberts, we lost important database records when three of our salespeople quit. Those records were stored on their laptops and we have no way of retrieving the information. We are strongly considering a web-based, centralized database system for automating sales force follow-up. Do you agree or see it differently?"

If they decide to take part in a competitive situation, they'll probably do it as they do other tasks—bit by bit—until they do it just right. Unlike their colleagues who may show enthusiasm at the beginning, Thinkers often demonstrate the patience and follow-through to ultimately win—if they perceive the contest as worthwhile and don't become too preoccupied with details along the way. Whereas some people focus on winning shorter term battles, the Thinker is motivated by the ultimate sense of lasting personal glory derived from winning the war.

### ***Complimenting Thinkers***

Mention their efficiency, thought processes, organization, persistence, and accuracy. Don't mix personal and professional comments unless you know them very, very well. Even then, they prefer more privately communicated praise. "Jeffries, you were so thorough on this project that we had every shred of information we needed—and then some—just in case we required a safety net. Thanks again for another job done to perfection!"

One Thinker told us, "Compliments don't mean much to me. I really don't think about them. But I do like genuine, heartfelt appreciation once in awhile, like, 'You did a fine job,' or, 'I've really benefited from your work and others who have also told me about your contributions.'" In other words, keep praise simple and

concise for a Thinker. He went on to say that what he thinks about some accomplishment is much more important to him. "I'm hard on myself."

### ***Counseling Thinkers***

Elicit their thoughts about processes, procedures or problems, perhaps by asking something like, "If it were in your power, how would you change this to improve the situation?" Like Relaters, they often express their thoughts and opinions indirectly, so persist in your attempts to get them to talk. Thinkers dislike change because they typically view changes as unknown variables where unforeseen mistakes might happen. They need to plan for change ahead of time so they can identify (and bring under control) any key considerations that have to be addressed in the process. When possible, allow them time to investigate possible repercussions, especially at the beginning stages. That way, they'll know more about the situation and should feel more comfortable with upcoming changes.

### ***Correcting Thinkers***

Show Thinkers your preferred way to accomplish a task and they'll typically master the format, then modify it to suit their individual needs. Masters of refining processes, they tend to start with what they have to work with and personalize it, so that it works better as they see it. They may avoid people whom they perceive might direct them to do things differently. This is one way Thinkers maintain control of their work. They tend to side-step authorities who they think are endeavoring to correct them. At the extreme, this behavior can appear sneaky to other types, especially if the Thinker gets caught.

Specify the exact behavior that you have witnessed and outline how you would like to see it changed. Establish agreed-upon checkpoints and times. Allow them to save face, as they fear being wrong. "Nelson, your work here is typically done neat, on time, and right on the money. Now that we're updating the operating systems on all computers, you'll be able to turn out the same quality of work, only faster. I'd like you to take this computer class..."

### ***Communicating with Thinkers***

Be well organized and clear in your communications, since they are likely to ask lots of questions about the situation in their search for a logical conclusion. You may want to have them clarify all of their more pressing concerns. Ask your questions in a more discreet, non-judgmental manner to elicit the points, objectives, or assurances Thinkers seek (precision, thoroughness and reduction of risks): "Lenny, I'm not trying to pressure you, but are you not interested in the auditor's position, or in any position?"

### ***Making decisions and solving problems with Thinkers***

Set the stage by making sure they are open to discussing the problem or decision being considered at this time. If they aren't ready, either set a definite time that's better for both of you or explore their concern in even pursuing this subject. When the situation is being explored, review your impression of the entire process. "My understanding is this: You'd like to think it over for a week or so and figure out what kind of time commitment you'd be able to make to the group. When may I call you about your decision?"

Decide on a logical approach for gaining common agreement about both the nature of the problem (or decision involved) and the most reasonable way of finding how to resolve it. Do so in a way that is likely to be most satisfactory to them, you, and any other key individuals involved.

When suggesting a different possibility to Thinkers, point out how you would like to be able to identify those ideas, perspectives, or actions likely to allow you, them, and others to reach a more perfected solution or situation. Stress how fewer difficulties or less confusion is likely to result. Ask them what insights and suggestions they, or experts they know, could bring to this situation: "Carol, if we leave at 10 o'clock Friday morning and get to Palm Springs around 11:00, we can meet with Mr. Conkll and his V.P.'s for lunch to present our ideas for organizing their grand opening party. Do you know any wholesalers we can contact there so we can come up with a realistic estimate for making their party sure success?"

### ***When acknowledging Thinkers***

Focus on your realization of how difficult it can be for them to attempt to meet the high personal standards they set for themselves. Emphasize how much you appreciate their dogged pursuit of perfection. Cite a specific and appropriate example which proves this point. “Robert, you’re a very good chef. That salmon was cooked perfectly—juicy and flavorful without a hint of dryness. I don’t want to embarrass you, but I feel obliged to share with you how truly impressed I am. Thank you for your efforts.” Then, notice his reaction. If it’s discomfort, share with him that you did not mean to embarrass him, but just to let him know how much you value him. If his reaction is more positive, ask him to tell you more about the sense of satisfaction and enjoyment he derives from similar things. “I’ll bet you like creating other recipes, too. Is that correct?”

### ***Delegating to Thinkers***

Take time to answer their most critical questions about details, structure and/or guidance they require in a specific situation. The more they understand the details, the more likely they will be to complete the task properly. Be sure to establish deadlines. “Angela, the court date on the Mortimer case has been moved up to Monday, so we have to respond by speeding things up a bit. It will proceed almost as efficiently as if you researched everything by yourself if we enlist two associates to help you work, under your direction, on tasks you delegate to them and then review. Before getting started, do you have any preferences on the *who’s* or *how to’s* of this process that you think are essential to cover with me at this time?”

Action Plan . . .

## **WHEN YOU ARE THE THINKER**

- Modify criticism (whether spoken or unspoken) of others’ work
- Check less often, or only check the critical things (as opposed to everything), allowing the flow of the process to continue
- Ease up on controlling every emotion; engage in more *water cooler interaction*
- Accept the fact that you can have high standards without expecting perfection
- Occasionally confront a colleague (or boss) with whom you disagree, instead of avoiding or ignoring them (and doing what you want to do, anyway)
- Tone down the tendency to OVER-prepare

## **WHEN OTHERS ARE THINKERS, GENTLY REMIND THEM TO:**

- Share their knowledge and expertise with others
- Make smaller, less risky decisions faster
- Stand up for themselves with people they prefer to avoid
- Shoot for realistic deadlines and parameters
- View people and tasks less seriously and critically
- Balance their lives with both interaction and tasks
- Keep on course with tasks, with less double and triple-checking
- Maintain high expectations for high priority items, not necessarily everything

### ***The “best” leadership style***

Remember, there is no such thing as one best, all-purpose leadership style. Instead, the best leaders are those who realize what a job, role, or specific situation requires for successful performance and then adapts their behavior to facilitate those outcomes. At times, this may involve a clear-cut match between your own strengths and the required actions. At other times, behavior requirements may vary. The effective leader may

adapt their natural style by using new behavior adaptability taught by this book. Perhaps he may call upon other qualified individuals whose talents and energies can more productively handle the immediate problem. A good leader will always take thoughtful action to modify the environment. The goal should be to shift work priorities to ensure the successful completion of every task... without sacrificing the well-being of other people. Productivity will be maximized by using these breakthrough leadership techniques and adapting your communication style.

## About the Authors



Tony Alessandra, PhD, CSP, CPAE

Dr. Tony Alessandra is President of **Online Assessments**, a company that offers online multi-rater assessments and tests; co-founder of **MentorU.com**, an e-learning company; and chairman of the board of **BrainX**, a company that offers digital accelerated learning programs.

Working as a part-time, door-to-door cookware salesman while in college, Tony earned more money than his father. This was just the beginning of a lifetime of successful selling that continues to this day. Throughout his career, Tony has consistently risen to the top sales level in every endeavor. During the last two decades, he has sold (and delivered!) more than twenty-million dollars of his keynote speeches, seminars, workshops, and consulting.

Dr. Alessandra is a widely published author with 14 books translated into 17 foreign languages including **Charisma** (Warner Books, 1998); **The Platinum Rule** (Warner Books, 1996); **Collaborative Selling** (John Wiley & Sons, 1993); and **Communicating at Work** (Fireside/Simon & Schuster, 1993). He is featured in over 50 audio/video programs and films, including **Relationship Strategies** (American Media); **The Dynamics of Effective Listening** (Nightingale-Conant); and **Non-Manipulative Selling** (Walt Disney).

Recognized by **Meetings & Conventions Magazine** as "one of America's most electrifying speakers," Dr. Alessandra was inducted into the Speakers Hall of Fame in 1985---and is a member of the Speakers Roundtable, a group of 20 of the world's top professional speakers. Tony's polished style, powerful message and proven ability as a consummate business strategist consistently earns rave reviews.

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Scott M. Zimmerman

Scott Zimmerman is President of **The Cyrano Group**, a company that provides Platinum Rule® training and relational marketing services.

In 1991, Zimmerman founded Zimmerman Graphics, a full-service marketing/communications firm. He has helped hundreds of companies with positioning, copy writing, graphic design, advertising, promotions, printing and web development.

In 2001, Zimmerman revolutionized business-to-business marketing by unveiling the world's first web-based, fully automated, one-to-one communications system. **The Cyrano Marketing System™** (patents pending) sends customized emails, literature, letters and gifts that match every contact's behavioral style, preferences, interests and critical timing points throughout the relationship cycle. Cyrano builds a real-time, relational database, performs most of the relationship-building work for rainmakers and/or salespeople and is accessible from anywhere in the world.

Today, Zimmerman (and his firm) works with clients who desire to systematize every aspect of their business growth functions: lead acquisition, lead conversion, customer loyalty, and referral programs.

Zimmerman and Alessandra are founders and partners of **Platinum Rule Group**, which was formed to make the philosophy of "*Do Unto Others as They Want Done Unto Them!*" a common practice throughout the world.

Through books, audio/video programs, speeches, assessments and corporate training, we strive to improve our world by teaching The Platinum Rule®.

Scott serves as an entrepreneur, author, speaker, trainer and consultant. He may be reached by calling 1-330-848-0444 or via email: [Scott@TheCyranoGroup.com](mailto:Scott@TheCyranoGroup.com) or [Scott@PlatinumRuleGroup.com](mailto:Scott@PlatinumRuleGroup.com). Scott is the author of The Platinum Rule for Sales Mastery.

Ron Finklestein is President of **AKRIS LLC**, a company that provides business and technology coaching and consulting using a methodology he developed called "12 Action Steps to Predictable Business Growth". This approach is documented in his book *Celebrating Success! Fourteen Ways to a Successful Company*.

For over 20 years Finklestein provided consulting services for Fortune 2000 companies. His experience includes projects in the banking, manufacturing, insurance, information technology, healthcare, and government and finance verticals.

In 2001, Finklestein started AKRIS LLC with the sole focus of bringing large company experience, discipline and focus to smaller organizations to help them grow and succeed. His customers call him the Small Business Success Expert.



Ron Finklestein  
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Today, Finklestein (and his firm) works with clients who desire to systematize and implement predictability in the entire corporate structure: operations, sales, marketing, customer service, and back office processes.

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Check out his web site: [www.celebrating-success.com](http://www.celebrating-success.com) for more information on applying The Platinum Rule for Small Business Mastery (12 Ways to Build a Strong & Healthy Business.)

Other books by the author include: Celebrating Success! 14 Ways to Create a Successful Company ([www.businessmasterynow.com](http://www.businessmasterynow.com)) and 49 Marketing Secrets (THAT WORK) to Grow Sales ([www.49marketingsecrets.com](http://www.49marketingsecrets.com)).