



Primary Care/Specialty



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Objectives

After successfully completing the course, Participants should be able to:

- Discover their individual DiSC® style.
- Recognize each unique customer's buying style.
- Apply knowledge of their own individual priorities, strengths, and challenges in selling when partnering with customers.
- Navigate from their selling style to the customer's learning style to enhance sales performance.
- Use the DiSC® assessment to create an environment that will aid their success while increasing self-awareness and personal effectiveness in all interpersonal interactions.
- Develop a Customer Interaction Plan for a key customer to enhance the sales relationship.

Workshop Overview

Description

This workshop is intended to provide Representatives the skills to better connect with their customers and build solid relationships to close and drive sales performance.

The program focuses on consultative selling skills utilizing DiSC®, a four-quadrant model used by companies of all sizes to help employees and Managers develop a deeper understanding of themselves and others as they strive to develop more productive interpersonal interactions.

Target Audience

This program is designed for Representatives.

Recommended Class Size

This program was developed for classes of 12-16 Participants.

Pre-Work

The following items are completed by the Participants prior to the program:

- DiSC® Assessment (the reports are brought to the classroom by the Facilitator)
- Physician Profile Worksheet (1 per Participant – you may want to bring some extra blank forms in case a Participant did not complete one)

















Facilitator Checklist

Preparation and Setup	Instructional References	Equipment and Files	Supplies
<ul style="list-style-type: none"> ▪ Review the print materials including the Facilitator Guide and Participant Guide. ▪ Preview the PowerPoint files. ▪ Check to ensure the classroom setup is appropriate for the number of Participants. 	<ul style="list-style-type: none"> ▪ Facilitator Guide <p>For each Participant:</p> <ul style="list-style-type: none"> ▪ Facilitation PowerPoint Presentation ▪ Participant Workbook ▪ Individual DiSC® Reports for each Participant ▪ Physician Profile Worksheet (Participants bring) ▪ Everything DiSC® People-Reading Job Aid (one for each Participant) ▪ Everything DiSC® Customer Interaction Guide (one for each Participant) ▪ Either prepared flipcharts or “Discovering DiSC®” wall charts ▪ Name tents 	<ul style="list-style-type: none"> ▪ Facilitator laptop ▪ Projector ▪ Screen ▪ External speakers 	<ul style="list-style-type: none"> ▪ Tent cards ▪ Flipcharts/easels (minimum of four) ▪ Sets of markers

Agenda

Topic	Estimated Duration
Workshop Introduction	5 minutes
Understanding DiSC®	115 minutes
Break	15 minutes
Understanding Your DiSC® Selling Style	75 minutes
Customer Mapping	60 minutes
Lunch Break	60 minutes
Buying Styles	60 minutes
Adapting Your Style	60 minutes
Break	15 minutes
Role-Play: “Putting It All Together”	60 minutes
Wrap-Up	15 minutes



Icons Legend


Icon	Description	Icon	Description
	Topic Duration		Review
	Computer Activity		Transition
	CD/DVD		Training Coordinator Task
	Flipchart		Facilitation Tip
	Handout		Partner Discussion/Activity
	Participant Guide (PG)		Small Group Discussion/Activity
	Slide – Use this icon if a screen shot is unavailable. If using the icon, add the slide number under the icon. Show the slide before carrying out an action in an action column.		Large Group Discussion/Activity
	Slide Thumbnail – Show the slide before carrying out an action in the action column.		Role-Play




Introduction and Understanding DiSC®










Total Topic Duration: 120 minutes




Introduction Slide 1	 5 minutes	Say:	<p>Workshop Introduction</p> <p>Welcome to the workshop.</p> <p>This workshop is intended to provide you with the skills to better connect with your customers and build solid relationships to close and drive sales performance.</p> <p>Let's get started.</p>
Workshop Goals Slide 2	 Participant Workbook Page 2	Review	the workshop goals with Participants.
			<p>Facilitator Introduction (optional):</p> <ul style="list-style-type: none"> Introduce yourself to Participants. Depending on where this program falls in the course sequence, you may also have to provide Participants an opportunity to introduce themselves as well. Transition to the Discovering DiSC® Activity.



	 30 minutes		<p>Discovering DiSC® Activity</p> <p>Facilitator Summary: In this topic, you will:</p> <ul style="list-style-type: none"> ▪ Instruct Participants to move around the room to align themselves with the appropriate Discovering DiSC® posters (or prepared flipcharts). ▪ Ask Participants to work in small groups to record their reasoning on flipcharts. ▪ Ask small groups to present their charts to the large group. <p>Learner Objective: After completing this topic, Participants should be able to:</p> <ul style="list-style-type: none"> ▪ Associate themselves with behavior preferences or tendencies displayed on the Discovering DiSC® wall charts (or prepared flipcharts). ▪ Explain why they identified themselves the way they did. <p>Resources:</p> <ul style="list-style-type: none"> ▪ Discovering DiSC® wall charts or prepared flipcharts: <ul style="list-style-type: none"> ○ You can use a prepared flipchart in place of the DiSC® wall charts by preparing four flipcharts prior to the class. If you need to do this, prepare the following four flipcharts: <ul style="list-style-type: none"> • Write “Active” in big, bold letters across the top with the following bullet points underneath: fast-paced, assertive, dynamic, and bold • Write “Thoughtful” in big, bold letters across the top with the following bullet points underneath: moderate-paced, calm, methodical, and careful • Write “Questioning” in big, bold letters
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			<p>across the top with the following bullet points underneath: logic-focused, objective, skeptical, and challenging</p> <ul style="list-style-type: none"> • Write “Accepting” in big, bold letters across the top with the following bullet points underneath: people-focused, empathizing, receptive, and agreeable <ul style="list-style-type: none"> ▪ Four flipchart stands ▪ Markers
			<p>Tip: The Facilitator needs to work diligently to keep the group focused and to adhere to suggested times to complete this activity in 30 minutes.</p>
		Say:	<p>As Pre-Work, you completed the DiSC® Online Assessment. Before we distribute your report and review it in detail, we will explore the model that provides the foundation for this assessment.</p>
		Say:	<p>Let’s begin by looking at some basic differences among people.</p> <ul style="list-style-type: none"> ▪ I’m going to ask you to move to different parts of the room based on how you see yourself in your work environment. ▪ Don’t be concerned with trying to think through the right answer – there is no right or wrong. Just answer the questions as honestly and accurately as you can.
	 Active	Direct	<p>the Participants’ attention to:</p> <ul style="list-style-type: none"> ▪ The “Active” flipchart in the front of the room as you review the listed descriptors (fast-paced, assertive, dynamic, and bold).



	 Thoughtful		<ul style="list-style-type: none"> The “Thoughtful” flipchart in the back of the room as you review the descriptors listed (moderate-paced, calm, methodical, and careful).
		Instruct	the Participants to decide which flipchart best describes them – “Active” or “Thoughtful” – and to stand by it.
		Say:	Take a moment to observe who is in your group. Now, let’s see what happens if I ask you to describe yourself in a different way.
	 Questioning  Accepting	Direct	the Participants’ attention to: <ul style="list-style-type: none"> The “Questioning” flipchart on the left side of the room as you review the descriptors listed (logic-focused, objective, skeptical, and challenging). The “Accepting” flipchart on the right side of the room as you review the descriptors listed (people-focused, empathizing, receptive, and agreeable).
		Instruct	the Participants to decide which flipchart best describes them – “Questioning” or “Accepting” – and to stand by it.
		Say:	Take a moment to observe who is in your new group. Are the people the same or different than those in the last group you were in?
		Say:	So far you have been with two different groups based on how you tend to see yourself at work. Now, let’s see what happens when you get together with people who answered both questions the same way you did.

		Instruct	<p>the Participants to:</p> <ul style="list-style-type: none"> Look at the flipchart stands in the four corners of the room. <ul style="list-style-type: none"> The four flipcharts represent the four possible combinations of descriptions: <ul style="list-style-type: none"> Active & Questioning Active & Accepting Thoughtful & Questioning Thoughtful & Accepting Move to the corner of the room with the flipchart that matches their previous responses.
		Direct	<p>Participants to sit with their groups at a table near the corner of the room where they are standing.</p>
	 	Explain	<p>the following instructions:</p> <ul style="list-style-type: none"> Each person should share with their group why they answered each question the way they did and provide specific examples to support their responses. Use one of the blank flipcharts hanging on the wall nearest to your group. A member of each group should record the group's responses on a flipchart sheet. Another member of each group should plan to present the group's findings to the large group. <p>Tips:</p> <ul style="list-style-type: none"> Allow 8 minutes for the small group discussions. Once the group discussions start, invite Participants who think they placed themselves in the wrong group to move and join another group.

		Instruct	a representative from each group to present a brief 2-minute summary to the large group.
		Ask:	<p>What trends do you notice within each group?</p> <p>Point out that, although there are many common points of interest within each group, your individual reasons for placing yourself within that group may be very different. So, although you have many things in common with the people in your group, you also have many things that make you unique.</p> <p>Keep this in mind as we work through the remaining sections of the course.</p>
		Instruct	Participants to move their personal belongings and program materials to their new seats. They will sit with their groups for the next several activities.
	 10 minutes		<p>Introduction to DiSC®</p> <p>Facilitator Summary: In this topic, you will:</p> <ul style="list-style-type: none"> ▪ Facilitate a presentation that introduces the basics of the DiSC® model. <p>Learner Objective: After completing this topic, Participants should be able to:</p> <ul style="list-style-type: none"> ▪ Describe the basic tenets of the DiSC® model. ▪ Compare the DiSC® model to the results of the Discovering DiSC® activity just completed. <p>Resources:</p> <ul style="list-style-type: none"> ▪ Presentation ▪ Participant Workbook

<p>Keep in Mind Slide 3</p>		<p>Discuss</p>	<p>the bullet points on the slide. Emphasize the following key points:</p> <ul style="list-style-type: none"> As a personality assessment, the DiSC® model is not a test with right or wrong answers. DiSC® results can provide a common language for understanding human behavior. Everyone is a mixture of styles, although we all have certain behavioral preferences. Your DiSC® profile identifies behavioral preferences.
		<p>Instruct</p>	<p>Participants to fold their arms across their chests. Do this at the same time so Participants can observe you as well. (Everyone has a natural way they automatically fold their arms – either left over right or right over left.)</p> <p>After everyone has done so, then instruct all of the Participants to now switch and fold their arms the opposite way. (You may have to practice to be able to do this well in front of the class.)</p> <p>Observe Participants as they attempt to fold their arms the opposite way. Most will have to pause before they can do it; they may have to think about it. Some may not even be able to do it.</p> <p>Make the following key points:</p> <ul style="list-style-type: none"> All of us have developed a preference over time for how we fold our arms. It doesn't mean we cannot do it the opposite way, but we have a preference. Our preferred way of folding our arms feels right – it's comfortable. Most of us can still fold our arms the opposite way, but we have to work harder or stop and think about it. DiSC® is the same way. Your DiSC® profile will indicate

			<p>your behavioral preferences ... your natural tendencies. It does not mean you can't do things differently (e.g., adapt your style to a situation). It does mean you may have to work harder in certain situations.</p>
<p>Marston's Model Slide 4</p>		<p>Discuss</p>	<p>Marston's model. Highlight the following on the slide:</p> <ul style="list-style-type: none"> ▪ The two axes (Active and Thoughtful, Questioning and Accepting) that are used to form the basis for the four DiSC® styles. <ul style="list-style-type: none"> ○ Explain that Ds tend to be more Active and Questioning. <ul style="list-style-type: none"> ▪ Click to show D box that says: A D sees an unfavorable environment that they want to overcome. ▪ Consider the example of getting on a busy elevator ... The D walks up, gets on the elevator, and pushes the button that closes the door. ○ Explain that an i is more Active and Accepting. <ul style="list-style-type: none"> ▪ Click to show i box that says: An i sees a favorable environment in which they can influence others. ▪ Consider the example of getting on a busy elevator ... The i lets others in, says "Always room for one more," and, "Come in, you're going to be late; we'll wait for you!" ○ Explain that an S is more Accepting and Thoughtful. <ul style="list-style-type: none"> ▪ Click to show D box that says: An S sees a favorable environment that they want to maintain.

			<ul style="list-style-type: none"> ▪ Consider the example of getting on a busy elevator ... The S will wait in line patiently, even if a line for another elevator appears to be shorter. ○ Explain that a C is more Questioning and Thoughtful. ▪ Click to show D box that says: A C sees an unfavorable environment that they do not want to try to change. ▪ Consider the example of getting on a busy elevator ...The C will get on the elevator. If it's crowded, the C will count the number of people and, if the number is over the limit, will make someone get off.
The New DiSC® Model Slide 5		Discuss	the new DiSC® model. Compare it to both Marston's version of the model and the activity that was completed at the beginning of the class.
	 45 minutes		<p>Distribution and Review of Individual DiSC® Reports</p> <p>Facilitator Summary: In this topic, you will:</p> <ul style="list-style-type: none"> ▪ Distribute the individual DiSC® reports. ▪ Review the reports through a series of guided activities. <p>Learner Objective: After completing this topic, Participants should be able to:</p> <ul style="list-style-type: none"> ▪ Identify their DiSC® style preferences. ▪ Describe the typical tendencies associated with their DiSC® style preferences. ▪ Describe their intensity index. ▪ Describe the DiSC® model and how people in each quadrant tend to relate to one another.