

# Module 2: Understanding Your Buyer

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## Training Guide for One-on-One Session

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**Duration:** 30 minutes

**Objective:** Teach your team member to identify buyer personalities and adapt their sales approach accordingly

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## Pre-Session Preparation

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### Materials Needed:

- This training guide
- Module 2 Reinforcement Packet
- DISC assessment (simplified version)
- Personality type examples/scenarios
- Colored markers or pens (for visual learners)

### Review from Last Session:

- Check their activity tracking from Module 1
  - Celebrate wins and progress
  - Address any mindset challenges
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# 30-Minute Session Outline

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## Minutes 1-3: Connection & Review

**Opening Questions:** "How did your massive action commitment go this week? What was your biggest win?"

**Quick Review:** - Acknowledge their progress on activity tracking - Celebrate any mindset shifts or improvements - Address any challenges they faced

**Transition Statement:** "Now that you're taking massive action and have the right mindset, let's talk about how to make every conversation more effective by understanding your buyer's personality and motivations."

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## Minutes 4-8: Concept Introduction - Buyer Psychology

**Core Teaching Point:** People don't buy based on logic alone—they buy based on emotion and justify with logic. Understanding your buyer's personality type allows you to speak their language and connect on a deeper level.

**Quote to Share:** *"People don't care how much you know until they know how much you care."* - Theodore Roosevelt

### The Three Buyer Motivations (Brian Tracy):

**1. The Desire for Gain** Buyers want to improve their situation, make money, save time, or achieve their goals. They're motivated by what they'll GET.

**2. The Fear of Loss** Buyers are often more motivated to avoid losing something than to gain something new. Fear of missing out (FOMO) is powerful.

**3. The Need for Approval** Many buying decisions are influenced by what others will think. Status, recognition, and social proof matter.

**Question to Ask:** "Think about your last major purchase. Which of these three motivations drove your decision?"

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## Minutes 9-15: Deep Dive - DISC Personality Framework

### Introduce the DISC Model:

The DISC model helps you quickly identify four main personality types and adapt your approach. Most people are a combination, but usually one type dominates.

### The Four DISC Types:

#### D - Dominant (Driver)

**Characteristics:** - Direct, results-oriented, competitive - Values time and efficiency - Makes quick decisions - Wants bottom-line information - Can be impatient with details

**How They Buy:** - Fast decision-makers - Want to know ROI and results - Respond to challenges and competition - Don't want to be told what to do

**How to Sell to Them:** - Be direct and brief - Focus on results and outcomes - Present options and let them decide - Use phrases like: "You'll achieve...", "This gives you control over..." - Don't waste their time with small talk

**Example:** Successful business owner, executive, entrepreneur

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#### I - Influential (Expressive)

**Characteristics:** - Enthusiastic, social, optimistic - Values relationships and recognition - Makes emotional decisions - Loves to talk and share stories - Can be disorganized with details

**How They Buy:** - Decide based on feelings and relationships - Want to be liked and recognized - Respond to testimonials and social proof - Need reassurance and validation

**How to Sell to Them:** - Build rapport and be friendly - Share success stories and testimonials - Make it fun and exciting - Use phrases like: "People love this...", "You'll be recognized for..." - Give them time to talk and express themselves

**Example:** Marketing professional, real estate agent, sales person

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#### S - Steady (Amiable)

**Characteristics:** - Patient, loyal, supportive - Values stability and security - Makes careful, deliberate decisions - Avoids conflict and risk - Needs time to think things through

**How They Buy:** - Slow, methodical decision-makers - Want guarantees and low risk - Respond to proven track records - Need to trust you first

**How to Sell to Them:** - Be patient and supportive - Provide detailed information and references - Emphasize stability and security - Use phrases like: "This is proven...", "You'll have peace of mind..." - Don't rush them or create pressure

**Example:** Long-term employee, teacher, healthcare worker

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## **C - Conscientious (Analytical)**

**Characteristics:** - Precise, analytical, detail-oriented - Values accuracy and quality - Makes logical, data-driven decisions - Needs all the information before deciding - Can be skeptical and questioning

**How They Buy:** - Very slow decision-makers - Want data, specs, and comparisons - Respond to logic and proof - Need to analyze everything

**How to Sell to Them:** - Provide detailed information and documentation - Be prepared to answer technical questions - Show data, charts, and comparisons - Use phrases like: "The data shows...", "According to research..." - Give them time and space to analyze

**Example:** Engineer, accountant, researcher, attorney

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**Visual Aid:** Draw a simple 2x2 grid: - Top half: Task-focused (D and C) - Bottom half: People-focused (I and S) - Left side: Reserved (S and C) - Right side: Outgoing (D and I)

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## **Minutes 16-22: Practice & Application**

### **Exercise 1: Personality Identification (4 minutes)**

Present 4 brief scenarios and have them identify the DISC type:

**Scenario 1:** "A prospect interrupts your presentation after 2 minutes and says, 'Cut to the chase. What's the bottom line? How much will I make and how fast?'" **Answer:** D -

Dominant

**Scenario 2:** "A prospect spends 15 minutes telling you about their family, their hobbies, and asks about your weekend before discussing business." **Answer:** I - Influential

**Scenario 3:** "A prospect says, 'This sounds interesting, but I need to think about it. Can you send me all the information and some references? I'll need a few weeks to review everything.'" **Answer:** S - Steady

**Scenario 4:** "A prospect asks detailed questions about your methodology, wants to see comparison charts, and says, 'I've done extensive research on this topic. Can you provide the data to support your claims?'" **Answer:** C - Conscientious

### **Exercise 2: Adapting Your Pitch (4 minutes)**

Choose one of your loan products (e.g., DSCR loan). Have them practice how they would present it to each DISC type:

**To a D:** "This DSCR loan gets you funded in 14 days with no income verification. You'll close deals faster and scale your portfolio quickly."

**To an I:** "Investors love our DSCR loans! We've helped hundreds of people like you build amazing portfolios. Our clients rave about how easy we make the process."

**To an S:** "Our DSCR loan has been our most reliable product for 10 years. We have a 98% satisfaction rate, and I can connect you with clients who've worked with us for years."

**To a C:** "Our DSCR loan offers rates from 7.5-9.5% based on credit score and LTV. Here's a detailed breakdown of the underwriting criteria and a comparison with conventional financing."

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## **Minutes 23-27: Action Planning**

### **This Week's Specific Actions:**

**Daily Practice:** 1. Before each sales conversation, take 2 minutes to identify the prospect's likely DISC type based on initial interactions 2. Adapt your opening and presentation style to match their type 3. After each conversation, journal which type you think they were and how you adapted

**Weekly Goal:** Successfully identify and adapt to at least 10 different prospects this week

**Observation Exercise:** Watch 3 sales-related videos or TV shows and identify the DISC types of the characters

**Self-Assessment:** Complete the DISC self-assessment to understand your own natural style and potential blind spots

**Accountability:** "At our next session, I want you to share 2-3 examples of how you adapted your approach based on DISC and what the results were."

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## Minutes 28-30: Reinforcement & Wrap-Up

**Provide Take-Home Materials:** 1. DISC one-page reference guide 2. Personality identification worksheet 3. Script adaptations for each type 4. DISC self-assessment 5. Audio summary for review

**Key Takeaways:** - People buy based on emotion, then justify with logic - The four DISC types have different communication preferences - Adapt your approach to speak their language - Flexibility in your style = more closed deals

**Motivational Close:** "The best salespeople aren't the ones with the best pitch—they're the ones who can connect with anyone by understanding what matters to them. You now have a framework to do exactly that. Use it this week and watch your conversations improve dramatically!"

**Schedule Next Session:** "Next week we'll build on this by diving into the complete sales process framework—from first contact to close. You're going to love it!"

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## Coaching Tips for Different Learning Styles

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**Visual Learners:** - Use the 2x2 DISC grid with colors - Show video examples of each type - Create flashcards with type characteristics

**Auditory Learners:** - Practice verbal descriptions of each type - Listen to recorded examples - Discuss real prospects and identify types together

**Kinesthetic Learners:** - Role-play conversations with each type - Use physical movement (stand/sit) to represent different types - Practice adapting in real-time

**Reading/Writing Learners:** - Provide detailed written descriptions - Assign case study analysis - Have them write out adapted scripts

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## Common Challenges & How to Address Them

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**Challenge:** "How do I know which type someone is?" **Response:** "Listen and observe. D's are direct and fast. I's are friendly and talkative. S's are patient and cautious. C's ask detailed questions. You'll get better with practice."

**Challenge:** "What if I get it wrong?" **Response:** "That's okay! Most people are a blend of types. The key is to be flexible and adjust as you learn more about them during the conversation."

**Challenge:** "This feels manipulative" **Response:** "It's not manipulation—it's communication. You're simply speaking their language to help them understand how you can solve their problem. That's respectful, not manipulative."

**Challenge:** "My natural style is very different from theirs" **Response:** "That's exactly why this framework is so valuable. It helps you stretch beyond your comfort zone to connect with people who are different from you."

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## Success Metrics for This Module

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By the end of this module, your team member should: - [ ] Correctly identify DISC types in 7 out of 10 scenarios - [ ] Adapt their pitch for each personality type - [ ] Complete the self-assessment and understand their own type - [ ] Apply DISC framework in at least 10 conversations - [ ] Report improved rapport and engagement with prospects

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*"Seek first to understand, then to be understood." - Stephen Covey*

*"The most important thing in communication is hearing what isn't said." - Peter Drucker*