

Module 2: Understanding Your Buyer

DISC Assessment & Buyer Psychology Worksheet

Name: __ Date: __

Part 1: DISC Personality Self-Assessment

Rate yourself on each trait (1 = Rarely, 5 = Always):

D - Dominance (Results-Oriented)

- I prefer to take charge and make decisions quickly: ____
- I am direct and to-the-point in conversations: ____
- I focus on results more than relationships: ____
- I am comfortable with confrontation and challenges: ____

Total D Score: ____

I - Influence (People-Oriented)

- I enjoy meeting new people and socializing: ____
- I am enthusiastic and expressive: ____
- I prefer collaboration over working alone: ____
- I make decisions based on how others will feel: ____

Total I Score: ____

S - Steadiness (Process-Oriented)

- I prefer stability and predictable routines: ____

- I am patient and a good listener: ____
- I avoid conflict and seek harmony: ____
- I value loyalty and long-term relationships: ____

Total S Score: ____

C - Conscientiousness (Detail-Oriented)

- I focus on accuracy and quality: ____
- I prefer data and facts over opinions: ____
- I am systematic and organized: ____
- I ask many questions before making decisions: ____

Total C Score: ____

My Primary Style: ____ (Highest score)

My Secondary Style: ____ (Second highest)

Part 2: Identifying Buyer Personalities

For each of your current prospects, identify their DISC style:

Prospect Name	Primary Style	Key Indicators	Best Approach

Part 3: Communication Strategy by Style

How to Sell to D (Dominant) Buyers

What they want:

- Quick decisions

- Bottom-line results
- Control and options

Your approach:

- Be direct and brief: _____
- Focus on ROI and results: _____
- Give them choices: _____

How to Sell to I (Influence) Buyers

What they want:

- Relationship and trust
- Recognition and approval
- Fun and enthusiasm

Your approach:

- Build rapport first: _____
- Share success stories: _____
- Be enthusiastic: _____

How to Sell to S (Steadiness) Buyers

What they want:

- Security and guarantees
- Time to decide
- Personal service

Your approach:

- Be patient and supportive: _____
- Provide testimonials: _____
- Explain the process: _____

How to Sell to C (Conscientiousness) Buyers

What they want:

- Data and documentation
- Accuracy and quality
- Logical explanations

Your approach:

- Provide detailed information: _____
 - Answer all questions: _____
 - Give them time to analyze: _____
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Part 4: Buyer Motivation Analysis

For your top 3 prospects, identify their primary motivations:

Prospect 1: _____

- DISC Style: ____
- Primary Motivation (check one):
 - Financial gain/ROI
 - Security/safety
 - Status/recognition
 - Problem-solving
 - Relationship/trust

How I will adapt my approach:

Prospect 2: _____

- DISC Style: ____
- Primary Motivation: _____

How I will adapt my approach:

Prospect 3: _____

- DISC Style: _____
- Primary Motivation: _____

How I will adapt my approach:

Part 5: Practice Scenarios

Scenario 1: The Analytical Buyer (C-Style)

A prospect asks for detailed comparisons of your loan programs vs. competitors, wants to see all documentation, and needs 2 weeks to review.

My response strategy:

Scenario 2: The Relationship Buyer (I-Style)

A prospect wants to chat about their family, asks about your background, and seems more interested in “liking you” than the loan details.

My response strategy:

Scenario 3: The Results-Driven Buyer (D-Style)

A prospect says “Give me the bottom line - what’s the rate, what’s the timeline, can you do it or not?”

My response strategy:

Scenario 4: The Cautious Buyer (S-Style)

A prospect expresses concerns about risk, asks “What if something goes wrong?”, and wants reassurance about the process.

My response strategy:

Part 6: Weekly Application

This week, I will:

- 1. Identify the DISC style of ___ new prospects**
- 2. Adapt my communication** to match their style in ___ conversations
- 3. Practice active listening** to detect personality cues
- 4. Review and refine** my approach based on results

Commitment: I will use DISC insights to connect better with my buyers.

Signature: __ **Date:** __