

## Versatile Response Planner

### THE VERSATILE RESPONSE

#### IDENTIFY

*Identify* the person's Social Style.

*"She or he is . . ."*

#### REFLECT

Based on the person's Social Style, *Reflect* on and describe her or his expectations for interactions with you.

*"So she or he needs . . ."*

#### MODIFY

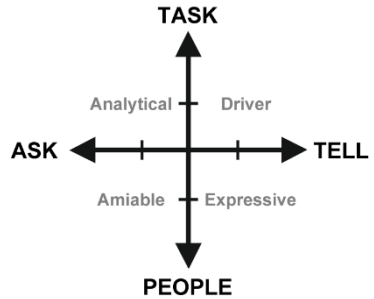
Decide how to *Modify* your behaviors to maximize your effectiveness.

*"Therefore I will . . ."*

The Versatile Response Planner is a tool for you to use when planning for a relationship or an interaction. It contains the following sections:

1. **Identify:** Determine the other person's Social Style.
2. **Planning for the Relationship and Planning for a Specific Interaction:**
  - **Purpose/Objective:** Identify how you would like to improve the relationship or what your objective is for the interaction.
  - **Reflect:** Describe the interpersonal expectations of the other person.
  - **Modify:** Design a Modify strategy.
  - **Review:** Evaluate your effectiveness.
3. **Social Style Summary:** Use this chart to review characteristics of each Social Style.

## Versatile Response Planner

IDENTIFY	
<ul style="list-style-type: none"> <li>Write the person's name or initials in the appropriate quadrant (and/or record this information in the space provided below).</li> <li>Write your name or initials in the appropriate quadrant (and/or record your Social Style in the space provided below).</li> </ul> <p>Other person's name and Social Style: My Social Style:</p>	

### PLANNING FOR THE RELATIONSHIP

PURPOSE
<p>How would you like to improve this relationship? (Be as specific as possible.)</p> <ul style="list-style-type: none"> <li></li> </ul>
REFLECT
<p>In general, what interpersonal expectations does this person have of you?</p> <ul style="list-style-type: none"> <li></li> </ul>
MODIFY YOUR BEHAVIOR
<p>In general, what can you do to improve your versatility in your relationship with this person?</p> <ul style="list-style-type: none"> <li></li> </ul>

## PLANNING FOR A SPECIFIC INTERACTION

SITUATION DESCRIPTION	
OBJECTIVE	
What is your objective for this interaction?	
REFLECT	
<p>Given the objective and the other person's Social Style, what style expectations does he or she have of you?</p> <p><b>Cautions:</b> Given the style differences, what should you be cautious about in your behavior?</p>	
MODIFY YOUR BEHAVIOUR	
Assertiveness Strategy:	<input type="checkbox"/> Increase Ask-directed <input type="checkbox"/> Increase Tell-directed <input type="checkbox"/> Maintain
Responsiveness Strategy:	<input type="checkbox"/> Increase People-directed <input type="checkbox"/> Increase Task-directed <input type="checkbox"/> Maintain
<b>Before:</b>	<b>During:</b>

## REVIEW

After the interaction, assess your strategy and execution: Disagree Agree

1. My observations of this person's style are accurate. ☐ ☐ ☐ ☐
2. My Modify strategy improved the other person's comfort. ☐ ☐ ☐ ☐
3. I achieved my objective for this interaction. ☐ ☐ ☐ ☐

- What could you have done differently?
- 
- **After:** What will you do as follow-up?
- 

## SOCIAL STYLE SUMMARY

	ANALYTICAL	AMIALE	DRIVER	EXPRESSIVE
PRIMARY ASSET	Systematic	Supportive	Controlling	Energizing
BACK-UP BEHAVIOR	Avoiding	Acquiescing	Autocratic	Attacking
FOR GROWTH, NEEDS TO	Decide	Initiate	Listen	Check
MEASURE OF PERSONAL VALUE	Respect	Approval	Control	Recognition
NEEDS A CLIMATE THAT	Describes	Processes	Responds	Collaborates
LET THEM SAVE	Face	Relationships	Time	Effort
MAKE AN EFFORT TO BE	Accurate	Cooperative	Efficient	Interesting
SUPPORT THEIR	Principles and thinking	Relationships and feelings	Conclusions and actions	Vision and intuition
STRESS BENEFITS THAT ANSWER	<i>How</i> the problem is solved	<i>Why</i> the solution is the best	<i>What</i> the solution will do	<i>Who</i> else has used the solution
FOR DECISIONS GIVE THEM	Evidence and service	Assurances and guarantees	Options and probabilities	Testimony and incentives
FOLLOW UP WITH	Service	Support	Results	Attention

## Consultative Planner: Relating

Meeting with:

My objective for this interaction is:

What do I want the client to do as a result of our interaction?

### PURPOSE / PROCESS / PAYOFF STATEMENTS

#### Introduce

**Purpose:** *The Purpose of this meeting is to:*

**Process:** *The way I'd like to proceed is:*

- 1.
- 2.
- 3.

*I anticipate this will take about (length of meeting):*

**Payoff:** *The Payoff for this meeting is:*

*For you:*

*For me:*

**Check:** *How does this sound to you?*

### DEMONSTRATE EMPATHY: BEN DUFFY QUESTIONS

What questions or concerns will this client have about this meeting, my organisation, and/or me?

How will I respond to these questions or concerns?

- 
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-

DEMONSTRATE CREDIBILITY	
	How will I demonstrate?
Propriety	
Competence	
Commonality	
Positive Intent	
REFLECTION	
I achieved my objective for this interaction:	No <input type="checkbox"/> Yes <input type="checkbox"/>
What could I have done differently?	
With whom do you need to share this plan?	

## Consultative Planner: Discovering

Meeting with:

My objective for this interaction is:

What do I want the client to do as a result of our interaction?

### MEETING PREPARATION

Have I prepared my meeting Purpose/Process/Payoff? ☐ Yes ☐ No

Have I prepared my Ben Duffy questions? ☐ Yes ☐ No

Have I prepared how I will ask permission to Discover? ☐ Yes ☐ No

### EXPLORE—IS THERE A GAP? YOUR QUESTIONS

What is the **Current Situation**?

What is the **Desired Situation**?

What are the **GAP causes**?

What are the **Task Motives**?

What are the **Personal Motives**?

**Other Information**

*Reminder: Review your questions to make sure you have a combination of fact- and feeling-finding questions.*

## DISCOVERY AGREEMENT FORMAT

<b>Opening</b>	<i>Dear _____,</i> [Personalize your introductory remarks to the customer. Ensure that the introductory remarks make the intent of the Discovery Agreement clear.]	
<b>Current</b>	<i>Current Situation:</i> <ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>	
<b>Desired</b>	<i>Desired Situation:</i> <ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>	
<b>Define the GAP</b>	<i>The challenges and barriers to the desired situation include:</i> <ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>	
<b>Request Agreement</b>	<i>I hope I have captured the salient points of our discussion. Please make any additions, deletions, or corrections and forward the changes on to me.</i>	
<b>Next Steps</b>	<i>Based upon the information you have given me, I think that the appropriate next step should be. . .</i>	
<b>REFLECTION</b>		
<div> <div></div> <div>No</div> <div>Yes</div> </div> <p>I achieved my objective for this interaction: <input type="checkbox"/> <input type="checkbox"/></p> <p>What could I have done differently?</p> <p>With whom do you need to share this information/plan?</p>		



## Consultative Planner: Advocating

Meeting with:

My objective for this interaction is:

What do I want the client to do as a result of our interaction?

### MEETING PREPARATION

Have I prepared my meeting Purpose/Process/Payoff? ☐ Yes ☐ No

Have I prepared my Ben Duffy questions? ☐ Yes ☐ No

### SOLUTION DESCRIPTION

Provide a brief description of the solution.

### SOLUTION / ADVANTAGE / BENEFIT STATEMENTS

Solution Summary	Advantage Statement <i>Appeals to Task Motives (Profit, Cost, Quality, Effort)</i>	Benefit Statement <i>Appeals to Personal Motives (Power, Approval, Recognition, Respect)</i>

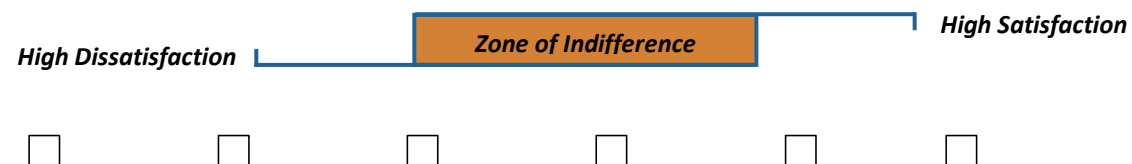
ASSUMPTIVE ATTITUDE		WRITE 2 OR 3 POSSIBLE ATTITUDE STATEMENTS	
What assumptive techniques will I use? <input type="checkbox"/> Options <input type="checkbox"/> Natural Next Step <input type="checkbox"/> Balance Sheet <input type="checkbox"/> Mini-Max <input type="checkbox"/> Cost Analysis			
ADDRESSING OBJECTIONS			
<i>Reminder: Objection = Unanswered Question or Concern + Tension</i>			
What are some likely <b>objections</b> ? • • •		What is the likely <b>unanswered question</b> behind each objection? • • •	
How will you answer each of the unanswered questions behind each objection? • • •			
REFLECTION			
I achieved my objective for this interaction: <div style="display: inline-block; width: 100px; text-align: center;">             No  <input type="checkbox"/> </div> <div style="display: inline-block; width: 100px; text-align: center;">             Yes  <input type="checkbox"/> </div>			
What could I have done differently?			
With whom do I need to share this information/plan?			

Consultative Planner: Supporting	
Meeting with:	What did I accomplish during my last interaction?
My objective for this interaction is:	What do I want the client to do because of our interaction?
MEETING PREPARATION	
Have I prepared my meeting Purpose/Process/Payoff? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Have I prepared my Ben Duffy questions? <input type="checkbox"/> Yes <input type="checkbox"/> No	
SUPPORT ELEMENTS (CHECK ALL THE SUPPORT ELEMENTS YOU ARE ADDRESSING AND WRITE YOUR ACTIONS)	
<input type="checkbox"/> <b>Enhance the Relationship</b> <ul style="list-style-type: none"> <li>How do I ensure the client's satisfaction?</li> </ul>	
<input type="checkbox"/> <b>Reinforce the Decision</b> <ul style="list-style-type: none"> <li>How do I address the client's concerns after the decision?</li> </ul>	
<input type="checkbox"/> <b>Manage the Implementation</b> <ul style="list-style-type: none"> <li>What is my role during implementation?</li> </ul>	
<input type="checkbox"/> <b>Deal with Dissatisfaction</b> <ul style="list-style-type: none"> <li>How do I anticipate and respond to things that may go wrong?</li> </ul>	

**ASK FOR AN EXPRESSION OF SATISFACTION**

How will I know my client is satisfied (and not in the Zone of Indifference)?

Current Level of Satisfaction

**ASK FOR AN EXPRESSION OF SATISFACTION**

I achieved my objective for this interaction:      No      Yes  
☐      ☐

What could I have done differently?

With whom do I need to share this information/plan?