



## Customer Service Action Planner



### *DiSC<sup>®</sup> Customer Service Action Planner*

## Increasing Effectiveness in Customer Service



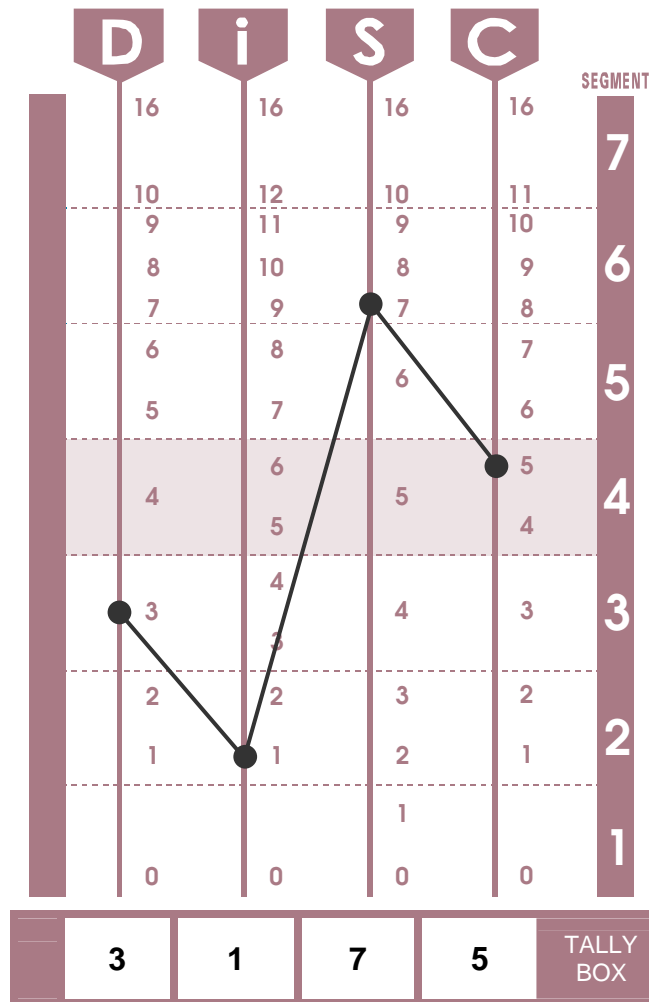
Respondent Name  
Friday, June 18, 2010

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# Sample's DiSC<sup>®</sup> Profile

Below is the DiSC<sup>®</sup> Graph that shows Sample's behavioral profile as you described her in your situation.



PROFILE DETAILS	
<b>First Name:</b>	Sample
<b>Last Name:</b>	Name
<b>Gender:</b>	Female
<b>Customer Service Situation:</b>	Exploring Client Needs and Expectations

## DiSC® Styles of Behavior

The chart gives you insight into the goals and fears of each DiSC® style of behavior. Sample's highest DiSC style is shown in the shaded box so you can better understand what motivates her.

The Intensity boxes for each DiSC style match Sample's profile graph plotting points. To refine your understanding of Sample, circle the words that you feel best describe her.

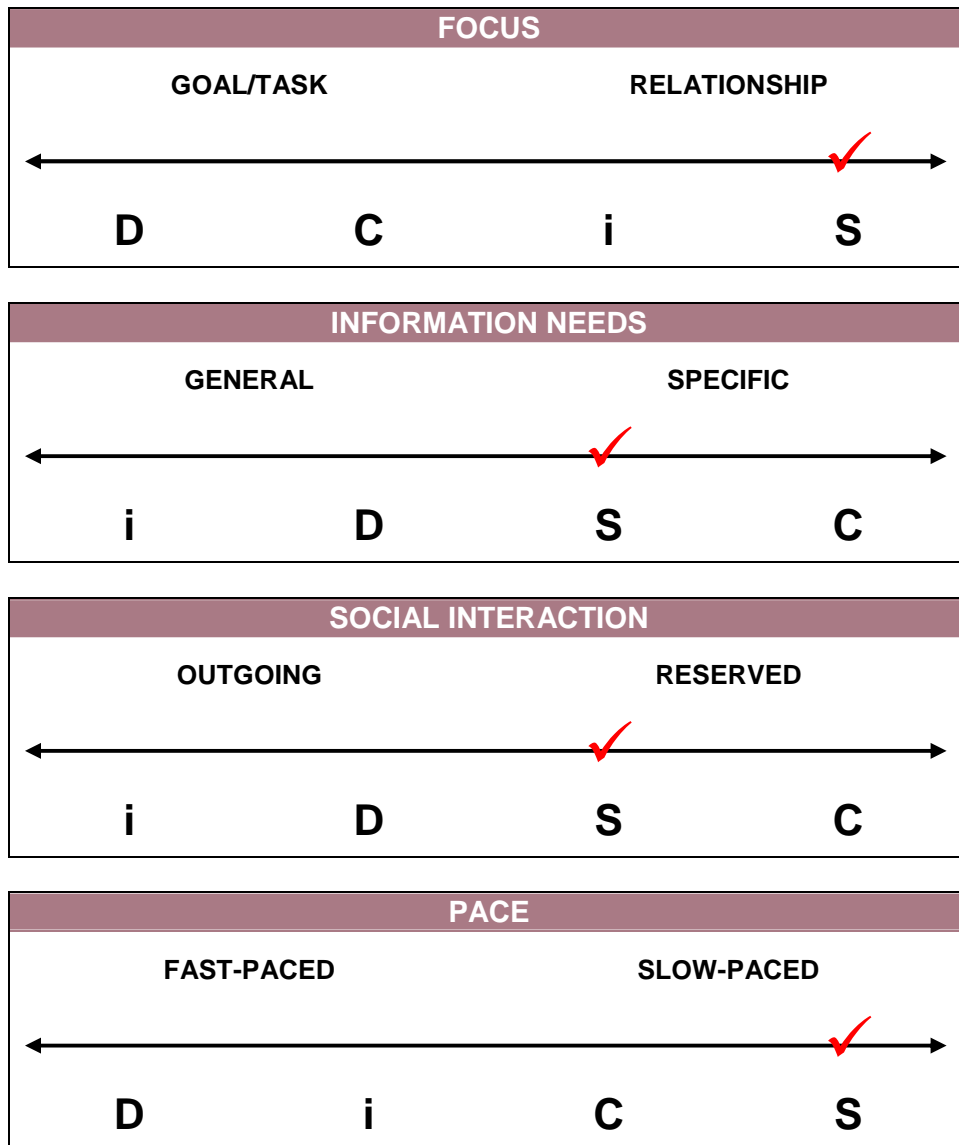
DiSC Style	Her GOAL Drive	Her FEAR Drive	INTENSITY		
			High (Segments 5, 6 and 7)	Moderate (Segment 4)	Low (Segments 1, 2 and 3)
<b>D</b>	Results; control	Losing control of environment; being taken advantage of	Direct Forceful Decisive	Competitive Self-reliant Unassuming	Cautious Mild Modest
<b>i</b>	People involvement; recognition	Rejection; loss of approval	Enthusiastic Self-promoting Sociable	Poised Confident Reflective	Controlled Pessimistic Withdrawn
<b>S</b>	Security; stability	Sudden change; losing security	Patient Predictable Cooperative	Nondemonstrative Deliberate Mobile	Critical Restless Spontaneous
<b>C</b>	Accuracy; order	Criticism of performance; lack of standards	Accurate Conscientious Restrained	Analytical Evasive Persistent	Arbitrary Defiant Tactless

## Adaptability to Different Styles

The four pure behavioral styles exist on comparative continuums with each other. The four behavioral tendencies scales illustrate the degree of adaptation that is required for effective communication as they match your response to Sample's behavioral style.

Sample's strongest behavioral style (i.e., highest plotting point) is marked with the ✓ symbol.

If you have completed your own **DiSC® Profile**, plot your highest DiSC style on each of the four scales with an "X." The degree of difference indicates how much you will need to adapt to communicate with Sample in her comfort zone.



## Suggestions for Interaction

Sample's strongest behavioral style (i.e., highest plotting point) is shown in the shaded column. When developing your **Action Plan** (page 6) for her, review the suggestions provided below for each approach in the customer service process.

	<b>D</b> Dominance	<b>i</b> Influence	<b>S</b> <b>STRONGEST</b> Steadiness	<b>C</b> Conscientiousness
<b>▼ Process</b>				
<b>PLANNING</b> Develop an overall plan focusing on her behavioral style as it relates to your service.	Develop a strategy concentrating on her fear of being taken advantage of and her goal of personal control.	Develop a people-oriented approach. Emphasize how your product or service increases her influence and approval from others.	Research how your service will provide her support. Emphasize how this will simplify and stabilize her existing relationships and practices.	Be prepared to address your product or service performance record. Assure accuracy and appeal to her quality concerns.
<b>INITIATING</b> Use the amount and type of interaction needed to put her at ease.	Limit socializing. Get to the point. Respond to her task-related need.	Be casual and friendly. Relate to her feelings and aspirations.	Be informal and low pressure, but methodical, in your interaction.	Get down to business swiftly but tactfully. Respect her privacy. Let her be the expert.
<b>INTERACTING</b> Clarify how you can help satisfy her expectations.	Be businesslike. Ask “what” questions that focus on her concern for results.	Be enthusiastic. Ask “who” questions that reveal her motivations.	Be sincere. Ask “how” questions that show concern for both tasks and relationships.	Be businesslike. Ask questions that let her express knowledge, strategies, and apprehensions. Respond to “why” questions.
<b>RESPONDING TO CONCERNS</b> Address her concerns based on style needs.	Accept her bluntness. Show your desire to help her achieve added results.	Respond with empathy to her feelings or doubts. Use feeling statements and give testimonials of others' success.	Accept and share her feelings. Offer ongoing support. Probe for real concerns, if necessary.	Seek and respond to her most pressing questions. Reinforce concern for logic by providing reassuring evidence.
<b>GAINING SHARED COMMITMENT</b> Keeping style in mind, influence the customer relationship to gain appropriate commitment.	Highlight her key options. Acknowledge the decision is hers to make.	Use an upbeat approach that inspires her to action. Ask for the action that lets you meet her business needs.	Detail how she can practice action. Sincerely support her decisions. Seek a firm commitment without pushing.	Offer options and clarify her priorities in making a product or service decision. Support her demand for logical actions.
<b>SERVICE FOLLOW-THROUGH</b> Strengthen your win-win relationship by satisfying her expectations and concerns.	She tends to expect efficiency and agreed-upon delivery. Provide reminders of your proven track record. Strengthen your position by achieving desired results.	She may expect your follow-up to spare her personal effort or complications. Meet her need to “look good.” Be responsive, informal, and open in your dealings.	She tends to expect personal attention, availability, and assistance. Provide repeat, predictable follow-up to assure the stability she desires.	She may expect specific assurances for reliability and quality standards. Summarize your business relationship verbally and in writing, and review periodically.

## Management Action Plan

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**PLANNING:** Given Sample's DiSC® style of behavior, what are some things you must make sure you do and avoid doing?

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**INITIATING:** How much and what kind of interaction is most appropriate for Sample?

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**INTERACTING:** What questions will you ask to confirm her personal and organizational issues?

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**RESPONDING TO CONCERNS:** What are some likely concerns (i.e., objections, fears) she may have, and how can you reduce them?

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**GAINING SHARED COMMITMENT:** What ongoing approach is likely to be most effective for gaining Sample's commitment?

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**SERVICE FOLLOW-THROUGH:** What follow-through expectations is Sample likely to have, and how can you effectively respond?

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**What did you learn from your meeting? How can you improve your next contact with Sample?**

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**PLANNING:** Was Sample's DiSC® style of behavior the same as it was the first time you filled out the Customer Profile? If not, what have you now concluded is her actual style of behavior?

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**INITIATING:** How was the comfort level between you? What could you change next time that could increase this comfort level for each of you?

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**INTERACTING:** What customer needs were discovered? What questions might you ask during your next meeting?

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**RESPONDING TO CONCERNS:** What were Sample's main concerns? What responses could you make next time that might satisfy these concerns?

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**GAINING SHARED COMMITMENT:** Did you gain the type of shared commitment you sought with her? If yes, what were the results? What strategy will you use to help further build her commitment next time?

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**SERVICE FOLLOW-THROUGH:** How does Sample need to be serviced in your follow-up business actions? What achieved, productive, business results can you build on to expand your business with her?

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