



The *Behavioral (DISC) and Workplace Motivators* Assessment Tool

This assessment tool helps individuals better understand their own natural communications style, ability, strengths and weaknesses, in order to achieve better results in sales, persuasion, motivation and presentation situations.

The objective is to develop an awareness of where each person you communicate with is coming from, and what to expect from him or her. You can then:

- **Maximize your strengths**
- **Manage your weaknesses**
- **Preempt unwarranted conflict**
- **Close gaps in priorities**
- **Reach consensus on goals and decisions**
- **Achieve the results you want**

We want to help you explore the following questions, employing insights and modifications that will assist you in realizing better outcomes:

- **What are your natural talents?**
- **What is your approach to making decisions and tackling problems?**
- **How do you tend to communicate?**
- **How do you prefer to be communicated to?**
- **What should be avoided when communicating with you?**
- **What is your value to the organization?**
- **What motivates you?**
- **How are your strengths perceived by yourself? By others?**
- **What happens when you overuse your strengths?**
- **How do you adapt from your natural style to your work role style?**
- **Because of your natural style, what are your:**
 - **Time/task management tendencies?**
 - **People relating tendencies?**
 - **Rules, practices and procedure tendencies?**
 - **Pace and flow tendencies?**

The DISC and Workplace Motivators assessment provides a personal, customized report that helps to answer all of these questions. The assessment takes less than 20 minutes and is taken online. A PDF report is emailed to you and you discuss it with your business coach.

Want to Know More About DISC?

When it comes to your **behavior** – your habits as a professional, as a sales person, as a prospector, as a communicator, as a service provider – are you getting the **return on investment** of yourself that you should?

Are you satisfied with your **results**?

Your *natural behavioral style* describes how you prefer to communicate, how you approach people, how you solve problems, and generally how you go about achieving your goals. Everyone's natural behavioral style has strengths within some roles and is effective with some people, but face limitations and ROI drops when styles are mismatched.

Are you as effective as you would like to be in **tackling tasks** and **being effective** with the widest range of people?

Sometimes a *small adjustment* can deliver

huge gains.

The one thing that you can control is your own behavior, and if you understand yourself and understand your prospect or client, you can choose the most effective behavior that will achieve the results you want.

Behavior can be defined as what you do and the style in which you do it. There are four primary styles of behavior in the **DISC** system:

Dominance – relating to control, power, assertiveness and how one responds to problems.

Influence – relating to social situations and communication and how one influences others regarding their point of view.

Steadiness – relating to patience, persistence, thoughtfulness and how one responds to the pace of their environment.

Conscientiousness (or compliance) – relating to structure and organization and how one responds to rules and procedures set by others.

Behavior is predictable. If you can determine a person's behavioral style, you can predict how he/she will act and react in a variety of situations and you can use a predetermined strategy that will work best with his style.

Learning the basic language of DISC is simple. With a little practice, you can put it to work immediately for fast results. With a little focus you can easily integrate it

into your client profiling, sales strategies, presentation methods, public speaking, performance reviews and team development.

DISC leverages three distinct business applications:

- 1) **Knowing Yourself** – DISC is a self-awareness tool with actionable strategies. The ability to interact effectively with people may be the difference between success and failure in your work and personal life. Effective interaction starts with an accurate perception of oneself.
- 2) **Knowing Your Client/Prospect** – DISC is a people-reading tool with strategies for adjusting your selling and servicing style to the buying style of the client, improving rapport and trust and your ability to interview, present, close and develop referrals.
- 3) **Knowing Your Team Member** – DISC can help tremendously to improve Manager – Player relations – so that both parties get what they need from each other to achieve their company and personal goals.

Your personal DISC report (*TTI Talent Insights*, Executive, Management or Sales version) will help you leverage your behavioral style for success. It is a human handbook that describes one's personal characteristics, communication do's and don'ts, keys to motivating and managing, areas for improvement and value to the organization, with a personal action planner.

Paired with private executive coaching, your personal DISC Report becomes a customized action plan to improving your personal effectiveness.

In addition to the assessment and reporting tool, workshops are available to learn the DISC language.

The full-day workshop, **Dynamic Communication**, has a three-part agenda:

- 1) Introduces the behavioral model of DISC;
- 2) Reviews one's personal report and creates an action plan for greater personal effectiveness;
- 3) Takes participants through communication skills exercises to engage clients and prospects using DISC (approaching people, body language/physical skills, opening discussions, one-on-one conversations, handling objections and questions and closing sales).

Tell Me More About Workplace Motivators/Values....

Workplace Motivators or Values, complement DISC behaviors in understanding more of the total person. DISC behaviors are the “how” we move while Values motivators are the “why” we move.

There are six core values that drive the motivation of every individual. How a salesperson measures against these six areas will determine their level of passion to succeed. These six values are:

- 1) **Theoretical values** measure a person’s need to know. The higher someone rates in this area, the more emphasis he or she places on learning.
- 2) **Utilitarian/Economic values** measure an individual’s need to have a return on investment, whether that investment is money, time spent on an initiative, or an activity.
- 3) **Aesthetic values** reflect one’s need to seek harmony and form, and to establish subjective standards for evaluating the surrounding world.
- 4) **Social/Altruistic values** reflect the need to love and serve others.
- 5) **Individualistic/Political values** reflect the measure of belief in one’s control over one’s own destiny -- as well as the destiny of others.
- 6) **Traditional values** measure the need to follow a certain belief system or philosophy.

The half-day workshop, **Values Motivation**, delves into the other half of the participant’s TTI Success Insights report and puts the values into the context of how they affect decision making and goal setting. We also discuss how Values impact DISC patterns for deeper insight into a client’s financial needs and buying styles.

Behavioral research suggests that the most effective people are those who understand themselves, both strengths and weaknesses, so they can develop strategies to meet the demands of their environment.

About the Advisor to Advisors:

Edwards A. Holliday

- Founded Atlantic Leadership Group in 1989
- Owns and operates a franchise of Leadership Management, Inc., a world leader in programs and processes for developing strategy, leadership culture and productive practices.
- Owns and operates a distributorship of TTI profiles and training tools, a world leader in DISC assessment technology.
- 24 years of consulting and coaching experience in a wide range of service companies.
- Consulted with over 2000 Financial Advisors in 9 firms. Current clients include: UBS Financial Services, Morgan Stanley, Oppenheimer & Co., RBC Wealth Management, Merrill Lynch, Wells Fargo Advisors.
- Servicing 10-20 brokerage branches every month, holding 20-40 sessions in person each month with Financial Advisors, 80% of clients are teams and average production is above \$1M per advisor.