



Personalized Description and Success Strategies

- General Characteristics
- Strategies for Sales Management
- Approach to Selling



Respondent Name

Thursday, December 15, 2005

This report is provided by:

Resources Unlimited

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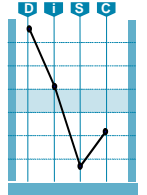
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Behavioral Highlights

This section lists the potential strengths of Respondent's behavioral profile. Personalize the information using these steps: <1> Put a check mark next to the statements that you think accurately describe Respondent's behavioral style. <2> Put an X next to the statements that you feel do not describe Respondent's behavioral style very well. <3> Write in comments to modify the statements to make them more descriptive.



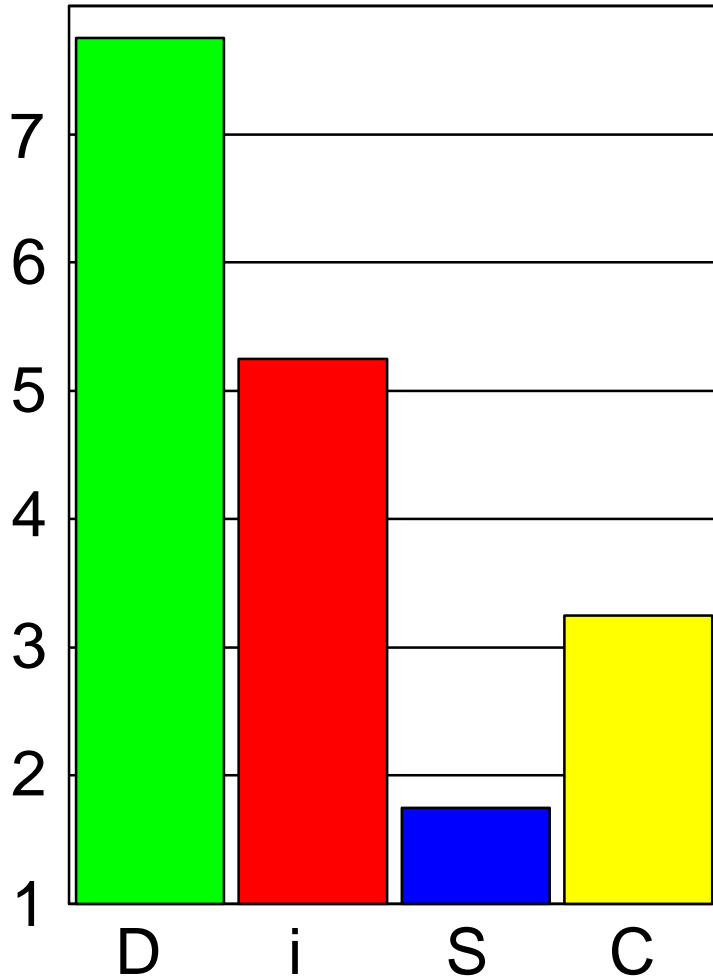
Result-Oriented

Some of Respondent's behavioral strengths may be

- Likes a fast pace, new activities, change, and variety
- Quick to act and creates a sense of urgency in others
- Enjoys challenges and competition
- Can move forcefully to get results
- Uses direct, action-oriented approach to solving problems
- Likes to interact with many different types of people
- Likes to express thoughts and feelings to others
- Animated and enthusiastic in expression
- Quick to adapt to new ideas and changes
- Seeks to find ways to interact positively in difficult situations



Personal Profile System® Graph



The DiSC® Dimensions of Behavior model describes behavioral patterns in terms of four tendencies. They are briefly defined below:

D Dominance: People with a high "D" behavioral tendency seek to shape their environment by overcoming opposition to accomplish results

i Influence: People with a high "i" behavioral tendency seek to shape their environment by influencing or persuading others.

S Steadiness: People with high "S" behavioral tendency seek to cooperate with others to carry out their tasks.

C Conscientiousness: People with high "C" behavioral tendency seek to work within existing circumstances to ensure quality and accuracy.

All people have all four behavioral tendencies but in differing intensities. The relationship of the four tendencies to each other creates a profile pattern which provides information about a person's potential behavioral responses.

Name: Respondent Name
 Date: 12/15/2005
 Classical Pattern: Result-Oriented

Completed by: Self
 Environmental Focus: Work

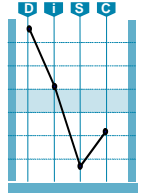
The above graph displays the relationship of the four behavioral tendencies in Respondent's profile pattern. The information on the following pages is based upon this profile pattern.

Remember, the *DiSC PPSS* is not a test. There is no such thing as a "good" or "bad" pattern. Research indicates that the most successful people are those who know themselves and develop strategies to meet the needs of specific situations. The following information is most helpful when reviewed, discussed, and put to use in developing specific action plans for increasing personal effectiveness.



Behavioral Overview

The following narrative, based upon the profile responses, provides a general overview of Respondent's natural behavioral style in the environment. This section is designed to provide a broad overview of his natural, most comfortable behavior. Respondent's actual observed behavior may be somewhat different due to modifications based on the demands of the situation, the expectations of others, and his personal values. Review and discuss the information, deleting the portions that do not seem applicable and highlighting the portions which may be most relevant and useful.



Result-Oriented

Respondent tends to be forceful, direct, competitive, poised, and convincing. He tends to be an individualist with a high level of ego-strength and may tend to be egotistical. He may seem to exude self-confidence, actively seeking opportunities which test and develop his abilities to accomplish results. He tends to like difficult tasks, competitive situations, unique activities, and "important" positions. He may undertake new activities willingly and confidently. He may be very much aware of his abilities; however, he may tend to be much less aware (or accepting) of any limitations. He may relish the challenge of any new activity, whether or not he has the skills, knowledge and experience it may require.

Tending to prize his independence, Respondent may become restless with group projects or committee work. Group activities tend to be much more acceptable to him if he chooses the activities and retains control. He generally tends to prefer working alone, although he may seek to persuade others to support his efforts and assist with the activity - especially the routine work which he may find boring.

He may tend to do things for his own benefit, perhaps ignoring requests which might involve giving up something he wants. If required to do something which does not appear to be in his own interest, he may become openly annoyed. His egotism may seem overbearing to some. He may seem to lack empathy, perhaps appearing to others as cold and blunt.

Tending to be quick in thought and action, Respondent may be impatient and fault-finding with those who are not. In fact, he may evaluate people on the basis of their ability to get results quickly. Results are what counts to him. Speed, efforts and theories may be of little importance unless they lead to concrete results. Respondent may be very determined and persistent, even in the face of antagonism or the opposition of others who may be in authority. He may take command of any situation whether or not he has been put in charge.

If things are not going well, Respondent may seem to lose his verbal abilities, substituting clear non-verbal signals of impatience and criticism. Whatever he does say may tend to be critical and fault-finding. This may be something of a "lull before the storm." The "storm" may begin with a strong statement that something is wrong, perhaps without any specifics as to what it is or what may be causing it. This may be followed by very broad, general criticism of the situation and the people involved. Finally, Respondent may undertake to "save" the situation single-handedly, perhaps overstepping boundaries, and "ruffling feathers," - all in the course of his efforts to get results.

In spite of his tendency for having a strong ego and a high level of self-confidence, Respondent may have some concern that others may take advantage of him. This concern, if it increases, may cause him to take steps to overpower a potential opponent. He may also have some fear that others will get ahead of him if he is too slow in accomplishing his goals. He may tend to be in a constant race against the clock and other people in the effort to reach the goal. He may also worry about appearing too light-hearted since



Behavioral Overview

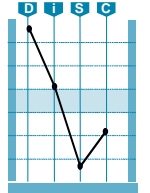
such interactions, and the ties to others that they may produce, may interfere with his pace and his concentration on goal accomplishment.

When approaching a new problem or decision, Respondent may quickly size up the available data, seeking additional facts only if there is a glaring lack of information, and then come to a tentative decision. He may monitor the actual results, making a change if they are not satisfactory. Although he may encourage suggestions from others as a way to get them involved in his project, he may not pay much attention to their information. He may take risks and try new, untested ideas. He may, on occasion, see making such an untested idea work as a personal challenge.



Motivating Factors

People have different sources of motivation and different goals based on their most preferred behavioral tendencies. This section lists those factors usually found to be most motivating to someone with Respondent's behavioral tendencies. Some of these factors may not apply to Respondent because he may have modified his behavior due to his life experiences and values system. Some of the factors may appear to be contradictory because of the differences in the tendencies that comprise Respondent's behavior. Review and revise as necessary.



Result-Oriented

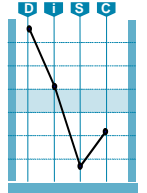
Respondent may be motivated by:

- Having control over his work environment
- Being able to direct other people's activities
- Being offered new opportunities and new challenges
- Situations where he is held accountable solely for results rather than for how the results are achieved
- Opportunities for advancement
- Rewards for achieving goals
- Situations providing positive interactions with others
- Opportunities to verbalize his thoughts and feelings
- Environments where two-way dialogue is encouraged
- Enthusiastic verbal recognition: "Great!" "Fantastic!"
- Immediate verbal feedback
- Having his feelings acknowledged



Preferred Environment

People have different preferences in the environment in which they most prefer to work or live. What one person finds delightful may be intolerable to someone else. This section provides information on what environment Respondent might find most desirable based on his behavioral tendencies. Some of these factors may not apply to Respondent or may appear contradictory because of the differences between the tendencies that describe Respondent's behavior. Review and revise as necessary.



Result-Oriented

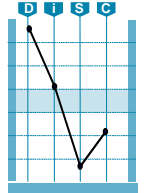
Respondent wants an environment which provides:

- Maximum freedom to determine how things are done
- Fast-paced, results-oriented
- Performance measurements and rewards based upon achieving agreed-upon results
- Him the opportunity to control events
- A fast-moving pace which involves relating to others with enthusiasm
- Recognition and positive feedback
- Opportunities for creative, imaginative "brainstorming"



Tends to Avoid

All people have different situations or activities that they naturally tend to avoid based on a dislike or fear of what is involved in the task or interaction. By knowing what our most likely avoidance behaviors are, we can choose strategies for coping with them and reduce possible negative outcomes such as procrastination. This section lists the activities and situations Respondent is most likely to avoid based on his behavioral tendencies. Some of the factors may not apply to Respondent. Review and revise as necessary.



Result-Oriented

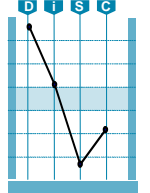
Based on dislike, discomfort, or fear, Respondent tends to avoid:

- Situations where he has no control over the environment
- Appearing soft or weak
- Situations requiring routine, predictable behaviors day after day
- Being closely managed by others
- Having to check in frequently and report what he is doing
- Having to report step by step how he is going to do a task or activity
- Situations where others may react to him with hostility
- Actions that might lead to loss of approval from others
- Having to choose between being liked or being respected
- Follow-through on extensive detail
- Routine, repetitive task work
- Environments that provide little or no contact with people
- Environments with rigid time constraints



Strategies for Increased Effectiveness

This section describes possible actions that Respondent might take to modify certain naturally occurring behavioral tendencies to achieve greater effectiveness. Some of these strategies may be already in use, others may represent areas for potential skill development. It may be useful to prioritize the strategies based on the needs of the current environment. Review and revise as necessary.



Result-Oriented

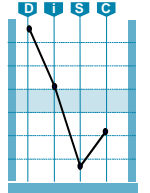
Respondent would increase his effectiveness by:

- Taking more time to think through possible consequences before taking action
- Listening and considering the thoughts, feelings and experiences of others
- Learning to negotiate outcomes on a win/win basis
- Explaining his reasoning process rather than just announcing conclusions
- Learning to participate in a group without being in charge
- Developing tact and diplomacy in communications and interactions with others
- Giving recognition to others for their efforts
- Developing a more realistic assessment of people and situations that includes negative and positive information
- Structuring a process for completing tasks in an orderly and timely manner
- Developing the ability to be firm and direct when dealing with interpersonal conflict
- Willingness to hear and consider negative thoughts and feelings of others
- Following through on key details on a more consistent basis
- Better management of time requirements
- Evaluating the amount of time spent in meetings and verbal communications with others



Demotivating Factors

People have different factors that affect their motivation both positively and negatively. By understanding what these factors are, we can increase the amount of time we are experiencing those conditions that enhance our positive motivation and reduce the impact of those factors which will reduce self motivation. The following list can be used to create an environment more supportive to positive motivation by managing or eliminating demotivating factors specific to Respondent's behavioral style.



Result-Oriented

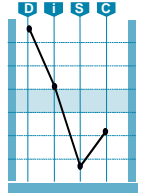
Respondent may become demotivated when:

- His authority is countermanded
- His responsibility is diminished
- His resources are restricted
- Required to do routine activities with little or no variety
- Closely supervised
- Required to report frequently on activities rather than results
- He has no opportunity for advancement
- Working in environments with reserved or unfriendly co-workers
- Required to meet fixed schedules and rigid time constraints
- Working in negative, pessimistic, hostile environments
- Required to focus on thinking to the exclusion of feeling
- Required to perform routine tasks with attention to detail



Behavior in Conflict Situations

Most people use behavior in conflict situations that can be described as either a "fight" or "flight" response based on their natural behavioral tendencies. Some people use a combination of both responses, depending on the intensity or degree of risk involved in the situation. The following describes a range of responses that Respondent might use in a conflict situation. These behaviors may have been modified due to Respondent's values system and/or life experience. This information will be more helpful if reviewed with Respondent, ranking the behaviors from most-likely to be used to least-likely.



Result-Oriented

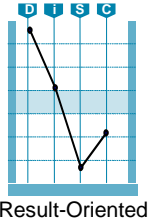
In a conflict situation Respondent:

- Tends to take a direct, aggressive approach
- May escalate levels of aggression
- May create win/lose outcomes
- May overpower others who then retaliate with covert aggression
- Tends to become defensive
- May become autocratic, using rank and authority to end the conflict
- Tends to avoid open, direct conflict
- Tends to become emotionally expressive
- May become personally attacking
- Tends to minimize negative information
- May attempt to placate angry people without addressing the issue
- May give in to avoid looking bad or losing approval
- May become impulsive



Behavioral Tendency Continuum

This continuum displays Respondent's potential range of intensity for each of the behaviors listed. This continuum represents potential behavior based on Respondent's profile pattern rather than actual, observed behavior. This information is most helpful when discussed and evaluated based on experience with Respondent.



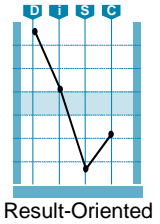
Name: **Respondent Name**
 Date: 12/15/2005
 Classical Pattern: Result-Oriented
 Environmental Focus: Work

	L	ML	M	MH	H
ACCEPTS - open, receives willingly			♦		
ADHERES - sticks to the rules		♦			
ADVOCATES - promotes, urges action					♦
AGITATES - stirs up, rocks the boat					♦
AMPLIFIES - explains, expands the point			♦		
ASSIGNS - delegates to others					♦
ASSUMES - takes for granted					♦
BOASTS - brags about abilities				♦	
CAPTIVATES - charms others				♦	
COMMANDS - directs others					♦
DIGESTS - absorbs, thinks it through			♦		
ESTABLISHES - stabilizes, builds to last		♦			
IMITATES - follows the leader's example			♦		
INVENTS - creates new solutions, ideas					♦
INVESTIGATES - examines, checks it out		♦			
JUSTIFIES - defends, gives reasons for		♦			



Behavioral Tendency Continuum

This continuum displays Respondent's potential range of intensity for each of the behaviors listed. This continuum represents potential behavior based on Respondent's profile pattern rather than actual, observed behavior. This information is most helpful when discussed and evaluated based on experience with Respondent.



Name: **Respondent Name**
 Date: 12/15/2005
 Classical Pattern: Result-Oriented
 Environmental Focus: Work

	L	ML	M	MH	H
MAINTAINS - continues, preserves		♦			
MANEUVERS - plans skillfully					♦
MODIFIES - adapts, adjusts, revises	♦				
NURTURES - shows care for others		♦			
OBJECTS - protests, argues, disputes			♦		
OBSERVES - watches attentively			♦		
PLANS - prepares, maps out task		♦			
PRAISES - compliments, shows approval				♦	
PROHIBITS - cautions, prevents risk			♦		
PROTECTS - guards tradition, stability		♦			
RECONCILES - appeases, settles differences		♦			
REVIEWS - examines in detail			♦		
SPECULATES - gambles on the future					♦
TESTS - examines, tries it out			♦		
TRUSTS - believes in others				♦	
VERBALIZES - talks things out			♦		



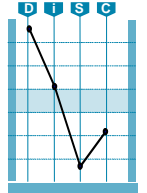
Performance Management Worksheet

5. What strategies for developing, modifying or eliminating behavior would be most useful for improving Respondent's behavior in conflict situations in this work environment?



Managing Respondent in a Sales Environment

All people are not the same. A management strategy that is very effective with one person may be disastrous with another. Trial and error learning about which strategies are effective with which person can be very costly both in lost time and lost sales. This section provides a starting point for developing sales management strategies based on Respondent's natural behavioral tendencies. By reviewing and discussing the strategies listed for each key management activity, you can develop an accurate, effective plan for managing Respondent in his specific sales environment.



Result-Oriented

Developing

- Help him become productive as quickly as possible
- Show him the simplest, quickest, most practical way to get results and meet his sales goals
- Emphasize primarily the key details which will be necessary to get sales results
- Define clearly the limits of his authority and the resources available to him for achieving sales results
- Use fast-paced, enthusiastic descriptions of the sales process and how it works with customers
- Get him involved quickly in new situations so he can begin building relationships with customers
- Reduce amount of details involved in training to avoid overwhelming him
- Check his understanding of the information by periodically requiring specific feedback on "how to's" of the job
- Provide assistance in developing structure for completing activities that require organization of information and attention to detail

Motivating

- Provide opportunities for him to work independently
- Allow him to direct the efforts of others for achieving significant results
- Offer him flexible options for achieving results
- Provide him challenges and opportunities to "win"
- Provide opportunities to interact with others in a positive, enthusiastic manner
- Allow time for discussions where he can verbalize his thoughts, feelings and ideas



Managing Respondent in a Sales Environment

Motivating (Continued)

- Assist him by providing support for following up on details
- Provide opportunities for visibility and recognition

Giving Recognition

- Use brief, direct statements focusing on his achievements, results and demonstrated ability to be a leader in his field
- Acknowledge his ability to handle difficult customer situations successfully
- Recognize the unique or innovative nature of his thoughts, ideas and/or actions
- Use enthusiastic public praise for his ability to use his verbal and interpersonal skills to achieve sales
- Acknowledge his persistently optimistic attitude in sales situations that others might find discouraging
- Recognize him for enthusiastically involving others

Coaching/Counseling

- Focus discussion on obstacles to achieving sales results and how he can eliminate them
- Discuss desired changes in his behavior in terms of potential positive impact on sales results
- Reduce his defensiveness by requesting solutions from him
- Be firm and direct, specifying the desired result as well as describing the current level of sales performance
- Direct the discussion to what he is going to do to eliminate the gap in performance
- Define the time limits for improvements and state the consequences clearly
- Provide an opportunity for him to express thoughts and feelings after hearing your feedback
- Acknowledge his feelings and direct his attention to facts and results
- Resist his attempts at side-stepping the discussion by re-directing his attention to the facts
- Use open-ended questions (what, where, when, how) to keep the discussion focused on facts rather than feelings



Managing Respondent in a Sales Environment

Coaching/Counseling (Continued)

- Direct the discussion to how he will improve his sales performance, avoiding extensive discussions about other people and other situations
- Discuss specific action plans for changing his sales performance rather than general statements about improving his attitude
- End the discussion by determining what result will be achieved by when, focusing on the benefits to him in terms of improved sales results and more recognition from others

Communicating

- Prefers direct, to-the-point communications without a lot of time spent on social chatter
- Be prepared to listen to his ideas before moving on to other topics
- Tends to practice selective perception and/or hearing, remembering only that with which he agrees
- Check at end of discussion to make sure everything was heard and stored in memory by asking him to summarize and restate
- Tends to prefer informal, open-ended discussions in more social environments, such as over lunch
- Desires an opportunity to share experiences, stories and ideas in an enthusiastic, responsive exchange
- May need to be directed to stay closer to the subject under discussion in order to finish within a reasonable time frame
- May not pay attention to the details of what is being said, and later may be unclear about the facts
- May have difficulty listening to negative information
- Check to determine whether the seriousness of the discussion was understood

Problem-Solving

- Tends to take a practical, results-oriented approach, preferring simple, easy-to-implement, immediate solutions
- May need to be directed toward considering the long term, negative consequences of some solutions
- May need coaching in handling complex problems due to his natural tendency to over-simplify in a rush for short-term results



Managing Respondent in a Sales Environment

Problem-Solving (Continued)

- May need to consider that his haste for immediate results may have a negative impact on the overall sales effort
- Tends to avoid complex, detailed problems requiring follow-up
- May need to be coached through a logical problem-solving process instead of relying on a "gut-feel"
- May have difficulty acknowledging that a problem exists due to his optimistic perception
- May need to have actual or potential consequences of the problem clearly stated for him to appreciate the need for a well-thought-out solution

Delegating

- Tell him what result you need and by when: Let him determine how to get it done
- Specify clearly the limits of his authority and the resources available to him allowing autonomy within those limits
- Clarify understanding and acceptance of specific sales performance expectations and time frame for completion
- Establish dates for checkpoints with clear understanding of what is to be completed by when
- Help structure the process for completing the task, especially when dealing with complexity or assignments requiring a methodical approach

Decision-Making

- Tends to be a quick decision-maker
- May need coaching on taking time to gather sufficient information and considering possible consequences before making decisions
- Point out benefits to him in taking more time in terms of improved sales results
- May tend to avoid making decisions involving negative consequences and/or interpersonal conflict
- Discuss how making a decision now will reduce negative results in the long term
- Explain how his indecisiveness frustrates others and makes him look bad



Managing Respondent in a Sales Environment

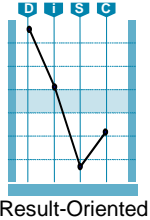
Decision-Making (Continued)

- Tends to make emotion-based decisions, sometimes impulsively, based on a "gut-feel"
- Coach on a more logical, fact-based approach to decisions



Respondent's Natural Approach to the Selling Process

This section describes how Respondent would tend to approach the various stages of the selling process based on his natural style. By understanding Respondent's natural approach to sales, it can be determined which of his natural behaviors are most effective in certain selling situations with specific customer styles. It can also be determined where additional training or coaching may be helpful in increasing Respondent's effectiveness in selling situations where his natural style may not be as effective. As some of these behaviors may already have been modified, review and revise this section as necessary.



Planning

- Tends to prefer to spend more time getting results than in planning
- Tends to focus on the big picture, letting the details take care of themselves
- Tends to focus on the goal or bottom-line result and may not prepare a step-by-step plan for achieving the goal
- May oversimplify complex situations or underestimate the potential obstacles and be surprised by buyer resistance
- His natural approach to planning may be most effective with customers who are impatient, results-oriented, and more interested in "what" than "how"
- His natural style may need modification to prepare for customers who need a more methodical, step-by-step explanation, with more detailed information provided
- Tends to prefer to spend more time interacting with people than in planning
- Tends to view situations optimistically, expecting the best, and may not think through handling potential obstacles
- Tends to use an intuitive, "gut-feel" approach to planning sales calls, and may not prepare adequate support information to cover the details
- His natural approach to planning works well with customers who respond to an enthusiastic overview, with a strong emphasis on interaction with others
- His style of planning may require modification to be effective with customers who are more interested in immediate bottom-line results, or with customers requiring a logical, well-documented approach in the sales presentation



Respondent's Natural Approach to the Selling Process

Opening the Call

- Tends to be direct and results-oriented, getting immediately to the point of the call
- Tends to avoid social chatter, considering it a waste of time, and moves right to business
- His natural approach to opening the call tends to be most effective with customers who are impatient and results-oriented
- His natural style may require modification to be effective with customers who prefer to spend more time interacting and building a relationship before moving to business
- Tends to use an enthusiastic, personal approach to opening the call
- May prefer to discuss low-risk, general topics to build rapport before moving to the purpose of the call
- His natural approach to opening the call works most effectively with customers who prefer to interact socially, verbalizing their thoughts and feelings in order to develop a personal relationship
- His natural style may require some modification to be effective with people who are more reserved, preferring a business-like, factual or results-oriented approach

Interviewing

- Tends to interview in a direct, aggressive manner, identifying the customer's goals quickly
- Tends to ask "what" questions, focusing on desired results
- His natural approach to interviewing works most effectively with customers who prefer directness; however, the customer may want more control over the interviewing process
- His natural style may require modification with customers who prefer a slower, more indirect approach, or with customers who become defensive in response to his aggressive approach
- Tends to interview in an enthusiastic, fast-paced manner focusing on feelings and relationships
- May tend to ask "who" questions, focusing on involvement and interaction with people
- His natural approach to interviewing is most effective with customers who prefer an eager, personal approach where they have an opportunity to talk about people, relationships and their feelings
- His natural style may require modification to be effective with more reserved customers who prefer a factual, unemotional approach to providing information



Respondent's Natural Approach to the Selling Process

Presenting

- Tends to be concise, focusing on results
- May tend to announce conclusions, rather than explaining his reasoning process
- His natural approach to presenting works most effectively with customers who are interested primarily in results, requiring little or no details in the presentation
- His natural style may need modification to be effective with customers who require a more methodical approach and a more detailed explanation
- Tends to use an enthusiastic approach, presenting the "big picture" with positive expressions
- May tend to over-state benefits in his desire to create excitement for the product or service
- His natural approach to presenting tends to be most effective with customers who respond to upbeat presentations that focus on an overview rather than on details
- His natural style may require modification to be effective with customers who prefer a low-key, factual, well-documented approach

Responding to Concerns

- Tends to respond to concerns directly
- Tends to focus on the goal or the result to be achieved, rather than on the concern
- May not listen fully to the concern, or minimize its importance to the customer
- His natural approach for responding to concerns tends to be most effective with customers who share a similar blunt, direct approach to concerns
- His natural style may need to be modified to be effective with customers who either require more emotional reassurance or a detailed explanation in response to their concern
- Tends to respond to concerns with positive, enthusiastic, general statements
- May not address specific concerns with information; instead may "tap-dance" around the issues, providing verbal reassurance that all will be well
- His natural approach for responding to concerns tends to be most effective with customers who want a strongly optimistic, general response to their concerns, rather than specific facts
- His natural style may require modification to be effective with customers who are more comfortable with detailed or step-by-step, factual explanations for how their concerns will be resolved



Respondent's Natural Approach to the Selling Process

Gaining Commitment

- Tends to move quickly and directly to gaining a commitment from a customer
- May aggressively pursue a commitment, considering "No" a temporary obstacle
- His natural approach to gaining commitment tends to be most effective with customers who are results-oriented and make quick decisions, as long as the customer does not become defensive as a result of experiencing loss of control of the buying decision
- His natural style may require modification to be effective with customers who prefer to take time to gather and review information and who resist making a decision before they have had time to analyze
- Tends to approach gaining commitment in an enthusiastic, optimistic manner
- May continue selling after the customer has made a commitment to buy
- His natural approach to gaining commitment tends to be most effective with customers who make quick decisions based on a "gut-feel", or customers who make decisions based on an emotional response to his enthusiasm
- His natural style may require some modification to be effective with customers who prefer to take time to review information and who approach decision-making analytically, based on product performance rather than on his personality

Servicing

- Tends to follow-up by efficiently checking on results
- May tend to be more interested in getting new sales than servicing existing customers
- His natural approach to servicing tends to be most effective with customers requiring minimal follow-up, as long as they are getting results
- His natural style may require modification with customers who prefer routine contact and follow-up
- Tends to follow up personally, building the relationship with enthusiastic, friendly interaction
- May prefer interacting with the customer more than following up on details of the sale
- His natural approach to servicing tends to be most effective with customers who prefer follow-up involving social interaction, such as dropping by to visit, phone calls or going to lunch
- His style may require modification to be effective with customers who require systematic, scheduled follow-up on detailed requests

