BEACON Capital Management

BEHAVIORAL SELLING

UNDERSTANDING DISC PERSONALITIES TO IMPROVE SALES

Effective verbal and non-verbal communication is essential to financial professionals today, both for understanding your client's needs and for them to be receptive to receiving your help. To help you gain a client or prospect's trust, take a look four of the different personality types to identify and connect with each of them.

C COMPLIANCE

The "C" is looking for: INFORMATION

Emotion: Fear

Quick Observations: Introverted, task-oriented

Communication: Direct

Overextension: Critical

Body Language:

Stance - Arms folded, one hand on chin

Walks - Straight line

Gestures - Very reserved, little or no gestures

Communication Clue: Asks detailed questions

D DOMINANCE

The "D" is looking for: RESULTS

Emotion: Anger

Quick Observations: Extroverted, task-oriented

Communication: Direct

Overextension: Impatient

Body Language:

Stance - Forward leaning, hand in pocket

Walks - Fast, always going somewhere

Gestures - A lot of hand movement when talking, big gestures

Communication Clue: Doesn't want others' opinions, only facts

S STEADINESS

The "S" is looking for: SECURITY

Emotion: Non-emotional

Quick Observations: Introverted, people-oriented

Communication: Indirect

Overextension: Possessiveness

Body Language:

Stance - Leaning back, hand in pocket

Walks - Steady, easy pace

Gestures - Will gesture with hands

Communication Clue: Has a "poker" face

I INFLUENCER

The "I" is looking for: THE "EXPERIENCE"

Emotion: Trust/Optimism

Quick Observations: Extroverted, people-oriented

Communication: Indirect

Overextension: Disorganized

Body Language:

Stance - Feet spread, two hands in pockets

Walks - Weaves, people focused, may run into things

Gestures - A lot of big gestures and facial expressions when talking

Communication Clue: Talks with hands

Source: Target Training International, Ltd.

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