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IDENTIFYING YOUR CLIENT'S STYLE

A key premise in this book is that *the best way to influence others is to understand what they want or need and help them to get it.*

In this chapter and the next we will explore a key principle when relating to others: *adapt your behavioral style to match that of your client.*

There are three steps to mastering this skill. The first step is to understand your own style and where you “fit” relative to other styles. The second step is to learn how to “read” other people’s styles. Step three is to adapt.

In this chapter, we will focus on the first two steps. In Chapter 4 we will discover how to adapt your style to develop a stronger connection with your client.¹

NEWS FLASH: PEOPLE ARE DIFFERENT!

In considering the concept of influence, I thought, “Since I know what *I* want or need – since I know *my* goals, motivations, and fears – wouldn’t it be great if everyone were just like me? Because then it would be easy to know how to influence and help them!”

¹ “Client” can mean “supervisor,” “internal stakeholder,” “CEO,” “direct report,” “client,” etc. I am using client in a general sense to mean “anybody one wants to influence.”

The problem is that not everyone is like me. We are all very different. Okay, I know that everybody knows this to be true. Let's also acknowledge however that:

1. we interpret our world through a certain lens, and
2. our default perspective is to behave as if others see the world the same way.

As humans we tend to treat people as we would want to be treated. We think that people will look at something the same way we do. We have an expectation that people will respond to situations like we would.

It does not take long to learn that this is not true. We discover growing up that some people are naturally outgoing, while others are quiet and reflective. Some like to take charge and get things done, while others like to make sure everyone is included and happy. Some like to take risks and others are conservative in their approach. The list of differences goes on.

“If you put yourself in their shoes and understand where they’re coming from, then you will be more effective as a communicator because communication is person to person. For one on one communication, I think it’s most effective when you spend time in advance thinking about where they are coming from and how to most effectively share the message from their perspective. Everything should be from their perspective.”

- LAURA HAY

INTRODUCTION TO STYLES AND MODELS

In this chapter, we will focus on the ability to *develop rapport with different kinds of clients*, to connect with them, and ultimately to adapt our own behavioral style to match that of our client.

As an influential actuary you want to *build immediate rapport* with your clients and colleagues. You also want to be able to *communicate your message clearly* to others. The communication style you use that is effective with one client, may not work well with another. The message would not get through with the same clarity.

In addition to clearly communicating with different kinds of people, you also want to be able to *convince, influence, lead, and direct those who are different from you* and to know how to relate to them according to their needs.

Successful influencers *understand themselves and how their behavior affects others*. They are aware of how they impact others and how others impact them.

FOUR BEHAVIORAL STYLES OF THE DISC MODEL

For our purposes, we will discuss a person's style as reflecting his or her temperament or behavioral preference. It may sound like an oversimplification, but over history, people have been categorized as exhibiting a preference for one of four different styles. These four-style models go back over 2500 years to the times of Hippocrates (blood, yellow bile, black bile, and phlegm), Aristotle (hedone, ethikos, propaitairi, and dialogike) and Galen (sanguine, choleric, melancholic and phlegmatic).

Since then many other models have been developed. Despite the variations from their ancient counterparts and, arguably, their greater sophistication, when boiled down, you end up with basically four behavioral styles that help us understand ourselves and others.

As an influencer, you want to possess the skill of navigating style differences in your repertoire. For our purposes, we will utilize the **DISC** model which was developed by William Moulton Marston², a professor at Columbia University. His book, *Emotions of Normal People*, introduced DISC theory to the public in 1928.

The four DISC styles are Dominance (*D*), Inducement (*I*), Submission (*S*), and Compliance (*C*). These terms have been updated for modern language to terms such as Dominance, Direct, or Drive for *D*'s; Influence for *I*'s; Steadiness or Stability for *S*'s; and Compliant, Conscientious or Cautious for *C*'s. We will use the terms Dominance (*D*), Influence (*I*), Steadiness (*S*) and Conscientious (*C*). We will comprehend the four styles better once we understand the model.

²Marston is also known for his work in developing the lie detector test. He was also the creator of "Wonder Woman" which introduced the role model of a strong female into comic strips.

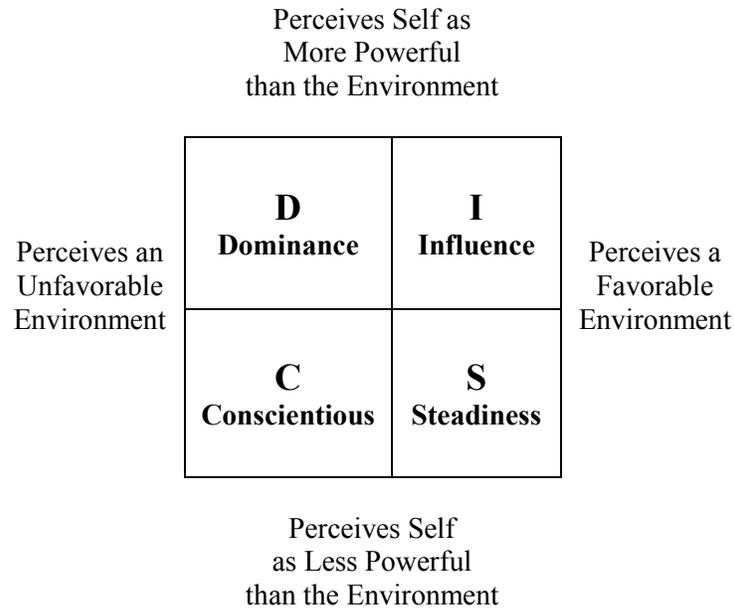


FIGURE 3.1

DISC is a two-dimensional model. The “north-south” axis is the *dimension of personal power*. People in the northern hemisphere tend to see themselves as more powerful than the environment whereas people in the southern hemisphere see themselves as less powerful than the environment. In other words, someone in the north will *direct his or her energy outward toward shaping or changing their environment*, whereas someone in the south will *tend to work within circumstances as they currently are*.

The east-west dimension determines perception of the *favorableness of the environment*. Someone in the east perceives the environment as favorable to them, whereas someone in the west perceives the environment as being unfavorable. A favorable environment would be one that is open, receptive, accepting and trusting. An unfavorable environment might be one that is resistant, antagonistic, and perhaps even hostile.

Each of the four styles forms an *overall life strategy* based on the underlying dimensions of that style. So we see the following:

Those in the **Dominance** quadrant see themselves as more powerful than the environment and the environment as unfavorable. Their life strategy

is to seek to shape their environment (i.e., change people, places, situations, etc.) by using direct action to overcome opposition.

People with an **Influence** style see themselves as more powerful than the environment and the environment as favorable. Since they view the environment as favorable, *I*'s are more likely to shape their environment by using persuasion to bring others into alliance.

The **Steadiness** group members see themselves as less powerful than the environment and view the environment as favorable. *S*'s seek to cooperate with others within existing circumstances.

Finally, people with a **Conscientious** style see themselves as less powerful than the environment and view the environment as unfavorable. *C*'s seek to work conscientiously within existing circumstances, exercising control by ensuring quality and accuracy.

Each style shares an underlying dimension with its adjacent neighbor. So *D*'s and *I*'s both see themselves as more powerful than the environment. *I*'s and *S*'s both see the environment as favorable. *S*'s and *C*'s both see themselves as less powerful than the environment. *C*'s and *D*'s both perceive the environment as unfavorable to them.

FOUR BASIC STYLES IN DETAIL

Let's now look at the characteristics of each style in more detail. Remember that these styles represent tendencies or preferences, not absolutes.

DOMINANCE (*D*'s)

Let's start with "*D*'s" which stands for "Dominance."

Toward other people, *D*'s are direct. They are probably the strongest delegators and directors of all the styles. They get results by and through other people. Their orientation is for results and variety.

D's are sometimes categorized as "chaos mongers" because they often have the attitude "if it ain't broke, break it." They will change things just to change them because they get bored very easily.

A *D*'s desire is to get immediate results, to take action, and to accept challenges. Decisions tend to be quick and impulsive – but actually compared to the other three styles, a *D* is an excellent decision maker. If *D*'s make a wrong decision, they will simply make another decision to correct it. The philosophy is “do something even if it's wrong, no looking back.”

D's are motivated by challenge, power and authority, and direct answers.

A *D*'s biggest fears are being taken advantage of and losing control. *D*'s do well if they can check things out with other people before reacting. What often happens is that *D*'s may be quick to assume people are trying to take advantage of them and write them off. So they benefit by checking things out with people to make sure they are not misinterpreting intent.

In terms of pace, *D*'s move very fast and tend to be impatient. They tend to be more task-oriented than people-oriented. Their tone is formal, direct, and can even be sarcastic at times. Their attitude is confident and about bottom line results.

What you will notice with a “*D*” is *self-confidence, decisiveness, and risk taking*.

INFLUENCE (*I*'s)

“*I*” stands for “Influence.” *I*'s tend to be people-oriented through and through. They are relating to people all the time.

They tend to make decisions based on what is popular. In other words, what will the majority of people appreciate?

Of the four styles, they demonstrate the most emotion. It is not that they *feel* emotions more deeply than other styles; rather they are more likely to wear their emotions on their sleeves. You can therefore usually observe an *I*'s emotions more clearly than the other styles – whether those emotions are expressed through laughter or through tears. Whatever end of the spectrum, *I*'s are going to appear more emotional than the other styles.

I's are motivated by social recognition, group activities and relationships.

Their *biggest fear is social rejection*. I coach many sales people, a profession that tends to attract *I*'s. They typically make great sales people when it comes to the front end of the process. They demonstrate; they develop rapport; they answer your questions, etc. Customers and clients like and trust them.

Where *I*'s are often found lacking in the selling process are in the performance of certain sales skills such as handling objections in asking for the sale and in closing. This is because if they ask for the sale, what might happen? Someone might say "no" and an *I* hates rejection more than does any other style.

I's are usually energetic and enthusiastic. Their pace is fast-moving. They tend, however, to be more patient than *D*'s. Their tone is informal and friendly.

STEADINESS (S's)

We will not move on to the *S*-style, which stands for "Steadiness." The overall strategy of an *S* is to cooperate with others within the existing circumstances.

These people tend to be very accommodating toward others. They are the hosts and hostesses of the world. Their orientation is to the team or the group. They desire to keep the peace and maintain harmony. Their tendencies are to be calm, patient, and loyal. They tend to be very good listeners, especially in a one-on-one conversation.

S's are *motivated by infrequent change, stability, sincere appreciation, and cooperation*.

Unlike *D*'s (their polar opposites), decisions tend to be slow and studied. Their theory is that "no decision is better than a wrong decision." If you try to push an *S* into making a decision, he or she will probably resist and not make one (or at least take a long time to make one).

An *S*'s *biggest fears are change and loss of stability*. He or she will do well in a time of transition if there is enough time to process what is going on. But there will be resistance to sudden and unexplained changes. Support is very important to an *S*.

An *S*'s pace is slow, calm, and patient. The tone is informal and pleasant. The attitude is steady, methodical and people oriented. Harmony is very important. *S*'s do not like to rock the boat.

CONSCIENTIOUS (*C*'s)

The last category is the *C*-style, which stands for "Conscientious." *C*'s are both reflective and questioning. They like to process information before responding to an inquiry. They also will question things, thus having a bias of healthy skepticism.

Toward others, these people tend to assess. Of the four styles, they tend to be the most critical. They are, however, often more critical of themselves than they are of others.

A C's orientation is toward correctness and quality. They want to do things right and value attention to standards, details, and analytical thinking. A *C*'s decisions tend to be objective and fact based. Just like on the 1960's TV show Dragnet³, they are saying "just the facts, Ma'am, just the facts."

C's tend to have a high need for personal space. They can come across as rather cool and aloof. They are actually quite sensitive emotionally but, unlike the *I*'s, you cannot read it in their faces.

A C's biggest fear is criticism of his or her work. If you offer valid criticism to *C*'s, they will be ten times harder on themselves about the error.

Like *S*'s, *C*'s tend to move slowly. At the same time, they are impatient, task-oriented, and formal like *D*'s.

What you will notice about them is their behavior is *cautious, precise, diplomatic, and restrained.*

³ Created and produced by Jack Webb, NBC 1951.

We can summarize the four styles as follows:

	D	I	S	C
Strategy	to shape their environment by overcoming obstacles	to shape their environment by using persuasion to bring others into alliance	to cooperate with others within existing circumstances	to work conscientiously within existing circumstances, exercising control by ensuring quality and accuracy
Motivated By	challenge, power, authority	social recognition, group activities, relationships	infrequent change, stability, sincere appreciation, cooperation	quality, accuracy
Fears	being taken advantage of, loss of control	social rejection, loss of influence	sudden change, loss of stability	criticism of their work, slipshod methods
Characteristics	formal, direct, results-driven, impatient, risk-taking, decisive, task-oriented	fast-moving, enthusiastic, friendly, emotive, people-oriented	slow, calm, patient, steady, people-oriented	cautious, precise, diplomatic, restrained, task-oriented, detailed-oriented

KEY PRINCIPLES TO KEEP IN MIND

As you become familiar with these four styles, think about which style represents your preference. For some people, identifying their primary style is fairly easy. For others, it may be more of a struggle. You may notice behaviors from two different styles that fit you. Some people actually have more than one primary style, but most of us tend to lean toward one style most of the time. This does not mean we cannot modify our *behavior* to be more like other styles. The next chapter is devoted to how we can adapt our style for better relationships with others.

It is important to understand some basic principles of DISC styles:

1. First, there are no superior or inferior styles.

The reactions of some people, when they learn about their own social styles, are interesting. Once I had a client take a DISC assessment and her primary style was identified as an *S*. As we debriefed her assessment she let me know that she was disappointed because she wanted to be a *D*.

This reaction comes from a misperception that certain styles are more desirable than others. In reality, styles are neutral and each style offers something valuable and necessary in an organization.

That said, we are all subject to cultural biases. In American culture, an *I* style is the most favored. Think of a motivational speaker or a Hollywood celebrity. This is followed closely by the *D*-style.

The one that has the most negative bias is the *C* style because *C*'s can be unfairly stereotyped as “nerds” or “geeks.” This perception has recently changed somewhat thanks to people like Bill Gates. Now it is becoming cool to be a *C*!

In order to see the value of having the whole range of styles on a team or in an organization, just look at what would happen if all employees were the same style. An organization of all *D*'s would be constantly competing with itself, with everyone vying for control. With all *I*'s – it most likely would be a very social atmosphere; not much would get done, but it would sure be a fun place to work! If all *S*'s – no one would make a decision, there would be plenty of teamwork but little progress, especially into new frontiers. A business with all *C*'s – there would be lots of quality, accuracy and compliance, little risk-taking and many missed deadlines. Perfectionism would rule over completion.

The point is that all the styles make the world go ‘round. The best teams have a balance of all four styles.

By the way, in doing many seminars with actuaries and other technical professionals (e.g., CPAs, IT professionals, and scientists), I have found the distribution to be roughly as follows: 15% (*D*), 5% (*I*), 40% (*S*) and 40% (*C*).

2. Your primary style represents your “psychological home.”

Your primary style does not define who you are or even how you

behave. What it does identify is your natural comfort zone. It is not that an *S* will never make quick decisions. It is that it *takes a great deal more emotional energy* for an *S* to do so than it would for a *D*. If an *S* were in that position day-in and day-out over time it could take its toll emotionally. The *S* may even become physically sick.

In the same way, try putting an *I* in a situation in which detailed analysis needs to be performed with little human interaction (i.e., in “C-land”). The *I* could certainly accomplish the task and with excellence, but would expend a great deal more emotional energy than the typical *C*.

3. All styles have strengths and limitations.

As you examine the traits of each style, you see they all have strengths. If you were picking an All-Star team, you would want each style represented. You would want, for example, some *D*'s to make things happen and take action. You would also want some *I*'s to market your message, be persuasive and develop relationships. *S*'s would act as the critical glue, promoting teamwork, as well as happily performing fundamental repetitive tasks. Finally, you would want *C*'s to make sure the quality of your product or service was top-notch.

Strengths overused, however, can become limitations. A *D* may be too controlling at times. An *I* may care too much about being recognized. Instead of being nimble, an *S* may resist change and move too slowly. A *C* may take compliance to an extreme and prevent anything from getting done.

4. Everyone is actually a blend of styles, so use caution when reading people.

Understanding these behavioral models can be really powerful. Be careful, however, not to pigeon-hole people into a style. While it is amazing how often people remain true to their primary style, human beings are too complex to be one-dimensional. That is why you will notice that my descriptions include the words “may” and “tend.”

People are actually a mixture of all four styles in varying degrees. This is similar to a graphic equalizer with four channels. Two people with a primary style of *C* may seem different to you as shown in Figure 3.2. One reason is because of the way they “set” the level of their *D*, *I* and *S* channels.

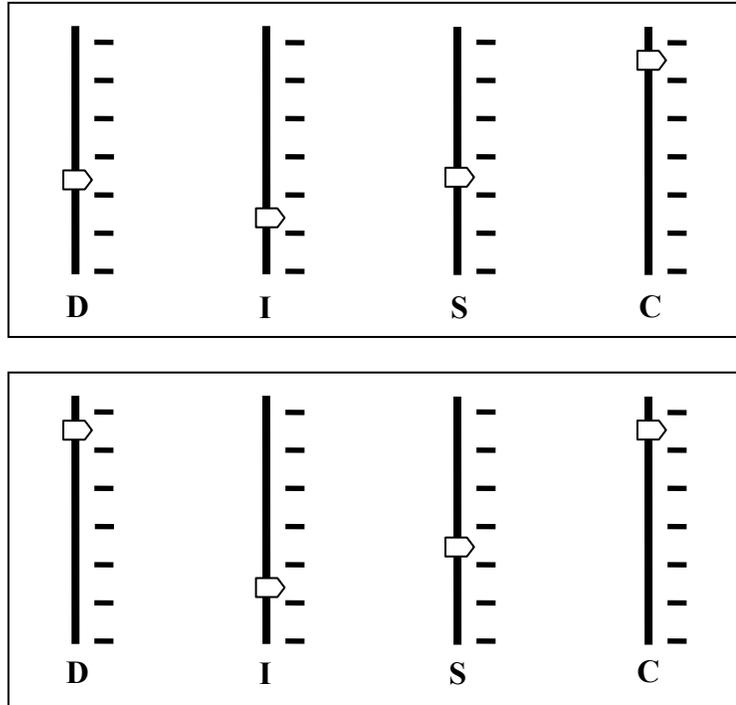


FIGURE 3.2

People will also exhibit certain behaviors that are uncharacteristic of a style because of their family upbringing, values, life experience, and the actual situation. For example, a client of mine, whose DISC profile showed him to be a high S, objected to the characterization that he tends to avoid conflict. In our debrief, he recalled how he learned to deal with confrontation over the course of his life and felt that he did not avoid it. Through his life experience, he had adapted his style. Another client with a high-*D* style claimed that she struggled over making difficult decisions (something that is typically easy for a “*D*”).

5. All styles can be more or less effective depending on how an individual modifies his or her *behavior* to meet the needs of others.

Because we do not live in a vacuum, our behavior has an impact on others. These interactions can be more or less effective depending on the combinations of styles – and resulting chemical reactions!

Style differences can cause tension in relationships. Style differences are often misunderstood as “real issues” in performance or relationship. Once we learn about these different styles, value these differences and learn how to adapt our own style, we can avoid these misunderstandings and the conflict that accompanies them. This will be the focus of the next chapter.

The first step in understanding what makes people tick is to develop awareness of your own style. You probably have a good sense for your preference just by reading the descriptions of each style and seeing which one resonates with you.

A second (and more robust) method would be to actually take a DISC assessment. You can find information on how to arrange for an online assessment at the end of this chapter.

A third method is to learn to “read styles.” If you can determine other people’s preferences with a little bit of information, you can apply the same approach to identify your own style.

Let’s explore this technique.

HOW TO READ STYLES

“I was a shoe salesman in college. I had no money. I worked on commission. No base pay. You had to sell. To be successful, you had to assess the person coming in. What is she likely to like? You had to know what they wanted, what made them look good. You had to show them that you truly care.”

- MIKE GULOTTA

The second step toward understanding what makes people tick is the ability to recognize their behavioral styles. The skill of “reading people” can come in handy, especially when you have little knowledge of the individuals and little opportunity to get to know them. When you are meeting a client or prospect for the first time or going into a meeting where you are trying to understand your audience, you have very little information available to determine their styles.

This skill is also handy just to get a sense of any colleague's style when you do not have access to a formal DISC report.

As the term implies, we are trying to get a quick read on a person's (let's call them the "subject") primary style by looking at elements, such as body language, voice tonality, pace of speech and words used.

One can zero-in on someone's style just by answering two basic questions:

Question #1: Are they more ENERGETIC or REFLECTIVE?

AND

Question #2: Are they more RECEPTIVE or CHALLENGING?⁴

The following diagram helps us identify these two dimensions:

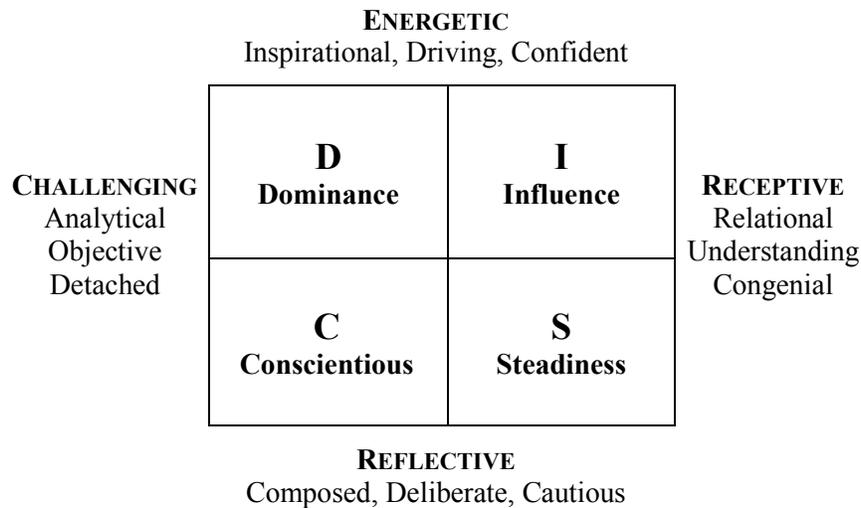


FIGURE 3.3

The north-south dimension is defined by Question #1, and captures the pace and level of assertiveness you observe in the person, from their body language, way of speaking and word choices. The northern hemi-

⁴ There are numerous adjectives one can use here. The key is to find the pairing that helps you best understand the various styles.

phere is where someone who is Energetic would reside. Additional descriptors to help you make this determination are: *Inspirational*, *Driving*, and *Confident*.

Alternatively, the subject that resides in the southern hemisphere would be considered Reflective. Other descriptors are: *Composed*, *Deliberate*, and *Cautious*.

These descriptors are congruent with Marston's model in that the north-south dimension measures one's perception of their personal power. If you see yourself more powerful than the environment, it stands to reason that you are more likely to be energetic, inspirational, and confident. Likewise, if you see yourself as less powerful than the environment, you are more likely to be cautious, reflective, and deliberate.

When using this method you *must* choose one side or the other. You may feel that your subject exhibits behaviors in both hemispheres. You must, however, pick the one that is most representative. This is a technique called "forced choice."

Next, for Question #2, we look at the east-west dimension. The eastern hemisphere is where someone who is Receptive would reside. Other descriptors are: *Relational*, *Understanding*, and *Congenial*. This is also consistent with Marston's model which deems someone here as perceiving the environment to be Favorable.

The western hemisphere is where your subject would be if you determined them to be Challenging, along with the other descriptors, *Analytical*, *Objective*, and *Detached*; again, consistent behavior for someone who perceives their environment as Unfavorable. Some people like to think of the east-west dimension as People-focused versus Task-focused. This can be helpful, but may be too limiting an interpretation.

Once we choose one side for our subject, we have four possible combinations:

- D = Energetic & Challenging
- I = Energetic & Receptive
- S = Reflective & Receptive
- C = Reflective & Challenging

This is a fairly simple technique to determine someone's primary style. With a little practice, you will be able to get a good gauge of people in the room in a matter of minutes.

I always use this approach in situations when I need to develop rapport quickly with people I just met. One time I was getting ready to begin a seminar with a group of executives with whom I had worked previously. This time we had a new participant, Olivia, who had just returned from maternity leave.

We had a few minutes before our session began and I simply watched how Olivia interacted with people. Most people were seated around the "U-shaped" configuration. Olivia greeted each person warmly, reaching out to shake his or her hand. I also noticed she grabbed their hand with both of hers. She was animated, energetic, laughing, and exuded positivity. I knew she must be an *I*.

My read was confirmed when I later saw her DISC Assessment and she was an "off-the-charts" *I*.

Now that we know the first two steps of mastering styles, we will take Step 3 in the next chapter.

ACTION STEPS

1. Identify your own style. Take a DISC assessment, if you haven't already. There are many places to get access to these. Contact me at www.TheInfluentialActuary.com to arrange to take an assessment.
2. Read and chart everyone in your division by their primary style. Then expand your chart to include more senior levels of the company.
3. Identify the styles of all your clients.
4. Think about those you work well with and with whom you have more difficult relationships. What role do you believe DISC styles have to play in these relationships?