

Customer Personality Types

Coaching Questions

“Can you describe the type of person that you normally sell to?”

Topic Introduction

Every business has a specific type of person who buys from them. This is part of your target marketing, but focused on more of a psychological description. Using adjectives will help you here.

Discussion Questions

1. What is the role or the job title within the organization that you sell normally sell to?
2. What is the person like that you normally sell to? Can you describe their personality? Their preferences?
3. Do you see commonalities between your customers? Do you see trends?
4. Are they more of drivers, influencers, steadiness, or conscientious? How do you know?

Key Learning

Typically a stereotype can be developed regarding your customers. Typically roles within the organizations have similar personality types. Or if you are working with different personality types, you can start to see trends of what to look for.

“How can you improve your communication with these people?”

Topic Introduction

Different personality types prefer to communicate differently. Each has its nuances it likes and dislikes. Knowing these can make your communication more effective.

Discussion Questions

1. What type of communication does your customer like? Do they prefer the phone? Face to face? Emails? Detailed attachments?
2. What duration of communication do they prefer? Short and to the point, personal, or detailed?
3. How can you change how you interact with them in order to improve your relationship and communication?

Key Learning

Drivers prefer direct, brief communication. A 5 sentence email or a 5 minute meeting is best.

Influencers prefer personal communication. Face to face or web conferences are the best.

Steadiness prefer emails to reduce their risk. They also like the phone to clear up issues and build the relationship over time. They need to be asked questions.

Conscientious prefer detailed emails with attachments. Handouts at meetings with more details are useful.

“Beyond DISC, what other influences affect your customers?”

Topic Introduction

DISC is an easy way to understand your customers quickly. There are many other influences beyond DISC that you may need to consider as well.

Discussion Questions

1. Are there other personality traits that you think that you might have to adapt for? Are there other models that make more sense for you?
2. Are there other parts of their role that may impact them? Does the corporate culture influence them?
3. Are there other decision makers that you also need to account for?

Key Learning

DISC is useful, but don't allow it to blind you to other factors that may influence your clients behaviour, preferences, and decision making.

Examples

As a sales consultancy, we saw customers in all different industries and in different roles within their organizations.

Real Life Example: Personality types by role

Stereotypes helped us to assign our sales people to the right client requirements.

If speaking to C level, you're normally speaking to Drivers. Talk about the Return on Investment (ROI) and payback on any investment.

If speaking to marketing, you're normally speaking to Influencers. They need to have humour in the conversation and think that something is really 'neat'. Another note, marketers usually work late and not early.

If speaking to IT, procurement, or HR, you're normally speaking to Steadiness. They need to reduce their risk and ask lots of questions. You also need patience and have the ability to listen yourself.

If speaking to finance, legal, or IT, you're normally speaking to Compliance. They need to know that you are credible, you need more training to know all the details, and the email that you send out needs to be thorough.

Real Life Example: Identifying DISC on the phone

On the phone, you can tell someone's personality type just as quickly as face to face. How?

When in doubt, start with too friendly yourself. You can always turn serious quickly. But it is tougher to start serious and to turn friendly/ humorous.

If the person is abrupt on the phone and direct in asking "why are you calling?", they are a Driver. You need to be direct back, speak about what's in it for them, and use numbers.

If the person laughs at your friendly opening, they are an Influencer. You can carry on the personal chat for a minute, then jump into the pitch saying something like "This is fun. I'd love to talk all day, but we should probably get some work done today!". Then jump into why you are calling.

If the person pauses, thinks about what you said, and then hesitantly says "okay", they are Steadiness. You need have patience, ask questions, and go slowly.

If the person pauses and then answers with a detailed or specific question, they are Compliance. You need to give them the details that they asked for and offer to send them information further elaborating on the question that they just asked. Now that you know they are Compliance, ensure that you continue giving details. If you don't know an answer, don't make up the answer. Let them know a precise time that you'll get that to them.

Real Life Example: A room with multiple personality types

If you are running a meeting and know the people who are coming to the meeting, make sure that you are addressing all of the personality types that will be there.

If you don't know the people in advance, here is the typical make up of the team who makes a decision.

1. Leader is typically a Driver. Creating a presentation for the Driver is a good practice as they will want a summary of the key points. Stick to whatever timeframe you are given. Usually make it shorter, no one is upset about a shorter meeting.
2. Owner of the budget is typically Compliance. You need to have hand-outs of the financials and details to ensure that they are satisfied. Otherwise they will not pay the bill.
3. Focus on overcoming risk. This is great for the 40% of the population which is Steadiness.
4. Crack a few jokes and show up early with coffee/donuts for the Influencers.

The best sales presentations ensure that you have a way to communicate with everyone in the room.