



Primary Communication DNA Style: **Goal-Setting**

Secondary Communication DNA Style: **Information**

A person who is focused on goals and is interested in opportunities to expand their world.

Specific Keys for Interacting with Chris Coddington (Based on Primary and Secondary Communication Style):

Communication strength for Chris:	<ul style="list-style-type: none"> • Comfortable speaking directly and candidly • Good at providing specifics and details
Keys for communicating with Chris	<ul style="list-style-type: none"> • Provide options • Get to the bottom line • Provide facts
Learns by:	<ul style="list-style-type: none"> • Taking action and discussion • Concrete examples and reading
Information requirement:	<ul style="list-style-type: none"> • Big picture • Provide research
Conversation starter:	<ul style="list-style-type: none"> • What has been a success for you recently? • What is a new idea you have read about lately?

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Customizing the Experience for Chris Coddington:

Overall Life Need	<ul style="list-style-type: none"> • Desire to influence people and situations • Desire for order and focus
Overall Financial Approach	<ul style="list-style-type: none"> • Goal driven • Follows budgets
Risk Management Approach	<ul style="list-style-type: none"> • Present risk/ reward • Show how risks are minimized
Meeting Conduct	<ul style="list-style-type: none"> • Make it formal • Make it structured
Office Setup	<ul style="list-style-type: none"> • Boardroom • Tidy, functional and practical
Information Requirement	<ul style="list-style-type: none"> • Present big picture • Provide research
Demonstrate Appreciation	<ul style="list-style-type: none"> • Provide opportunities • Send books
Presenting New Ideas	<ul style="list-style-type: none"> • Give overview. Get to the bottom line quickly • Make tangible
New Financial or Investment Products	<ul style="list-style-type: none"> • Show how will meet their goals and returns • Preference to minimize risk
Normal Business Entertainment	<ul style="list-style-type: none"> • Prefers formal events and to mix with influential people • Does not seek it out. May attend irregularly
Family Being Entertained	<ul style="list-style-type: none"> • Not needed • Will not influence decisions
Absorbing Technical Concepts	<ul style="list-style-type: none"> • Allow them to discuss • Need to see it in writing
Desire to Attend Technical Seminars	<ul style="list-style-type: none"> • Prefer to discuss the issues in a meeting or by phone • High where new product introduced
Recognizing Alternative Views	<ul style="list-style-type: none"> • They will like to know what influential people are doing • Accepted if recommended and backed up
Likelihood to Hold Grudges	<ul style="list-style-type: none"> • They tend to have long memories and may retaliate • Will be accepting if all the information was provided
Ability to Trust	<ul style="list-style-type: none"> • Low and trust needs to be earned. Don't do anything to compromise it in the future or complete reversal of trust will occur. • Likely to need more information and on consistent basis before giving commitment.
Pragmatism in Doing Business	<ul style="list-style-type: none"> • Like to be provided options and they will decide • Will be fixed on making the best choice
Likelihood of Changing Mind	<ul style="list-style-type: none"> • Will if the solution offered does not meet their goals • Honor agreements unless new information emerges
Engaging Topics of Conversation	<ul style="list-style-type: none"> • Their successes and world events • Their reading and research

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Guidelines for Creating the Client Workflow for Chris Coddington:

Service Delivery	<ul style="list-style-type: none"> • Be to the point • Be reliable
Preferred Style of Interaction	<ul style="list-style-type: none"> • Phone discussion • Email
General Service Requests	<ul style="list-style-type: none"> • Let them know within 24 hours the action steps • Email within 24 hours
Ongoing Advisor Interaction	<ul style="list-style-type: none"> • Discussion as needed • Send research updates
Pre Transaction Contact	<ul style="list-style-type: none"> • Introduce the idea and do not push • Give them regular online information flows
Post Transaction Contact	<ul style="list-style-type: none"> • Respond to questions as needed • Email within 1 week, provide confirming info
Commitment Time to Buy	<ul style="list-style-type: none"> • Short if aligned to goals • Slow until research performed
Fact Finder Completion	<ul style="list-style-type: none"> • Phone to respond to their questions • Will complete at home
Reaction to Negative Events	<ul style="list-style-type: none"> • Will be rational and want a solution to benefit from it • Will seek to analyze the cause then cut losses
Need to Meet Senior Executives	<ul style="list-style-type: none"> • Prefer to ensure their issues are heard at the top level • No need unless only way to overcome a problem
Dealing with Support Teams	<ul style="list-style-type: none"> • Will be respectful but will go over their head in a crisis • Will firstly respect chain of command to resolve issues
Length of phone calls	<ul style="list-style-type: none"> • Keep them short • Long enough to provide details
Managing Purchasing Risk	<ul style="list-style-type: none"> • Free trial • Independent validation
Buyers Remorse	<ul style="list-style-type: none"> • If goals/returns not met • If not all information provided
Technical Support Needs	<ul style="list-style-type: none"> • Will try to operate without it at first • Will want detailed information to solve the problem
Using New Systems	<ul style="list-style-type: none"> • Will if increases efficiency • Prepared to consider changes
Regulatory Compliance	<ul style="list-style-type: none"> • Will test the boundaries • Compliant and respectful

DNA Sales Style Adaptation Report™ for: Chris Coddington

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Guidelines for Adapting Your Sales Style When Selling to Chris Coddington:

Introduction	<ul style="list-style-type: none"> • Ask about their successes • Ask about a current event
Pace	<ul style="list-style-type: none"> • Proceed to the bottom line quickly • Proceed more slowly
Personal Approach	<ul style="list-style-type: none"> • Keep it business like • Keep it focused
Keeping Them Connected	<ul style="list-style-type: none"> • Address their goals first • Do not over embellish stories
Meeting Approach	<ul style="list-style-type: none"> • Allow them to direct the process • Be well prepared and structured
Presentation Style	<ul style="list-style-type: none"> • Explain the big picture • Explain how it will happen
Closing Style	<ul style="list-style-type: none"> • Give them options to decide on • Allow time to retreat and think
Sales Management	<ul style="list-style-type: none"> • Be specific on when the action steps will get done • Have additional information available
Negotiation	<ul style="list-style-type: none"> • Allow them to win • Recognize price sensitivity
Sales Conclusion	<ul style="list-style-type: none"> • Find out what else they want to know • Summarize the offering carefully
I will remember that my clients purchasing strength is:	<ul style="list-style-type: none"> • Will be decisive and change orientated • Will perform proper due diligence
I will remember that my clients purchasing struggle is:	<ul style="list-style-type: none"> • May be impatient and compromise quality • May seek to over analyze