



Customer Service Action Planner

*DiSC[®]
Customer Service
Action Planner*



**Increasing
Effectiveness
in Customer
Service**

**FORTUNA INTERNATIONAL
LIMITED**

LEADING PERFORMANCE IMPROVEMENT



Re o de t Na e
Su day, Se te ber 25, 2 5

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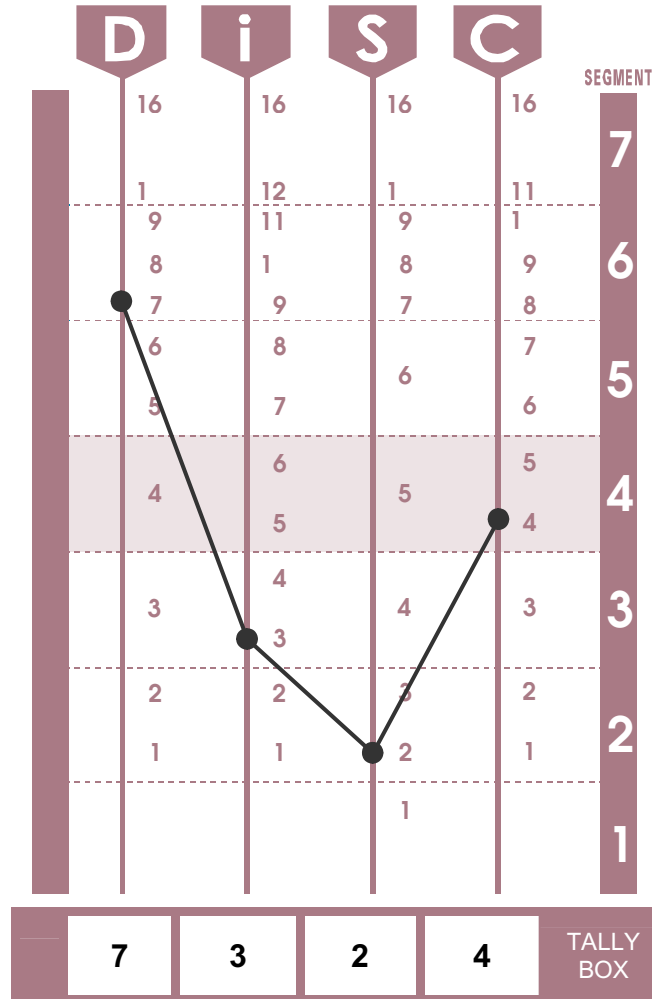
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Joey's DSC® Profile

Below is the DSC® Graph that shows Joey's behavioral role as you described your situation.



PROFILE DETAILS	
First Name:	Joey
Last Name:	Ryan
Gender:	Male
Customer Service Situation:	Exploring the need for a deductible

D SC® Style o Be av or

The art ve you t tot e oal a d ear o ea D SC® tyle o be av or. Jo ' e t D SC tyle ow t e aded box o you a better u der ta d w at ot vate .

The te ty boxe or ea D SC tyle at Jo ' ro le ra lott o t . To re e your u der ta d o Jo , r let e word t at you eel be t de r be .

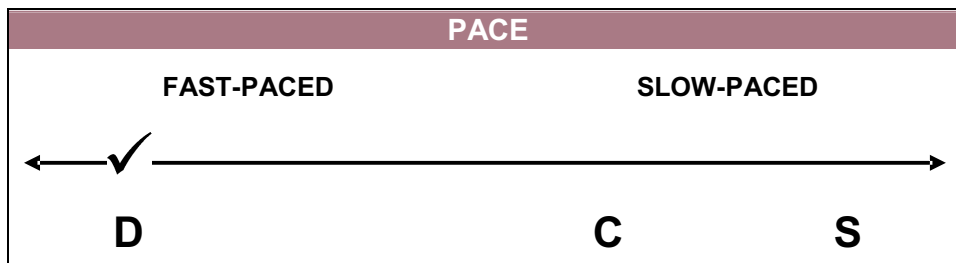
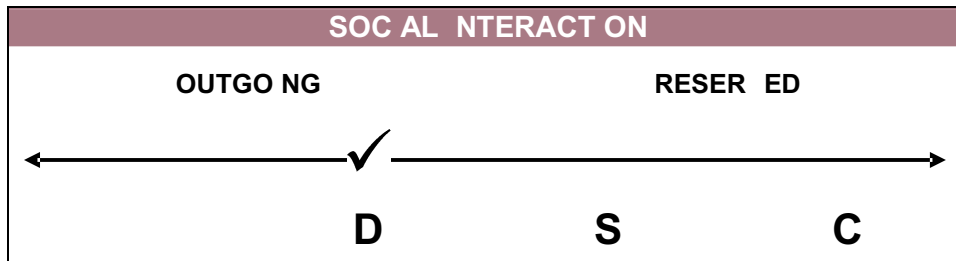
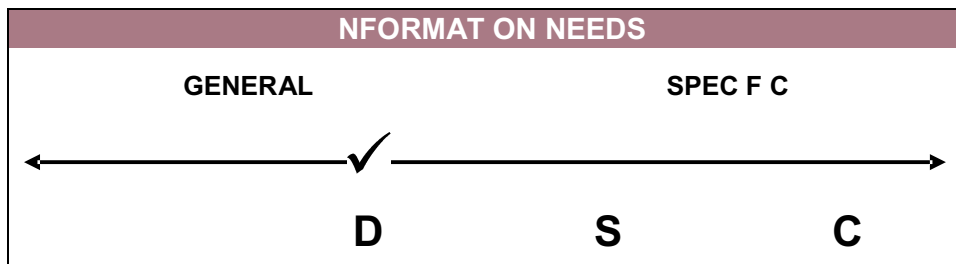
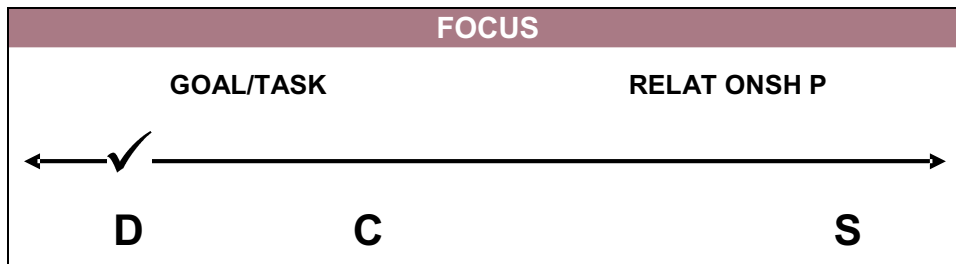
D SC Style	H GOAL Drive	H FEAR Drive	INTENSITY		
			H (Se e t 5, 6 a d 7)	Moderate (Se e t 4)	Low (Se e t 1, 2 a d 3)
D	Re ult ; o trol	Lo o trol o e v ro e t; be take adva ta e o	Dre t For e ul De ve	Co et t ve Sel -rel a t U a u	Caut ou MId Mode t
	Peo le volve e t; re o to	Ree to ; lo o a roval	E t u a t Sel - ro ot So able	Po ed Co de t Re le t ve	Co trolled Pe t W t draw
S	Se urty; tab l ty	Sudde a e; lo e urty	Pate t Pred table Coo erat ve	No de o trat ve Del berate Moble	Crt al Re tle S o ta eou
C	A ura y; order	Crt o er or a e; la ko ta dard	A urate Co e tou Re tra ed	A alyt al Eva ve Per te t	Arb trary De a t Ta tle

Adaptability to Different Style

The ourure be avoral tyle ex to o arative o t uu wt ea ot er. Te our be avoral te de e ale llustrate te de ree o ada tato t at required ore etve o u ato a t ey at your re o e to Jo ' be avoral tyle.

Jo ' tro e t be avoral tyle (.e., e t lott o t) arked wt t e ✓ y bol.

you ave o leted your ow **DSC® Profile**, lot your e t DSC tyle o ea o te our ale wt a "X." Te de ree o d ere e d ate ow u you will eed to ada t to o u ate wt Jo o ort zo e.



Su e to or tera to

Jo ' tro et be avoral tyle (.e., et lott o t) ow te aded olu . We develo your **A to Pla** (a e 6) or , rewet e u e to rovded below or ea a roa t e u to erv e ro e .

	D STRONGEST		S	C
▼ Pro e	Do a e	lue e	Stead e	Co e tou e
PLANN NG Develo a overall la ou o be avoral tyle a t relate to your erv e.	Develo a trate y o e trat o ear o be take adva ta eo a d oal o er o al o trol.	Develo a eo le-ore ted a roa . E a ze ow your rodu tor erv e rea e lue e a d a roval ro ot er .	Re ear ow your erv e will rovde u ort. E a ze ow t will l ya d tab lze ex t relat o a d ra te .	Be re ared to addre your rodu tor erv e er or a e re ord. A ure a ura ya d a eal to qual ty o er .
N T AT NG U e te a ou ta d ty eo tera to eeded to ut at ea e.	L t o al z . Get to te o t. Re o d to ta k-related eed.	Be a ual a d re dly. Relate to eel a d a rato .	Be or al a d low re ure, but et od al, your tera to .	Get dow to bu e w tly but ta tully. Re e t rva y. Let be te ex ert.
NTERACT NG Clar y ow you a el at y ex e tato .	Be bu e lke. A k "w at" que to t at ou o er or re ult .	Be e t u a t . A k "w o" que to t at reveal otvato .	Be ere. A k "ow" que to t at ow o er or bot ta k a d relat o .	Be bu e lke. A k que to t at let ex re k owled e, trate e , a d a re e o . Re o d to "w y" que to .
RESPOND NG TO CONCERNS Addre o er ba ed o tyle eed .	A e t blu te . Sow your de re to el a eve added re ult .	Re o d w t e at y to eel or doubt . U e eel tate e t a d ve te t o al o ot er ' u e .	A e ta d are eel . O ero o u ort. Probe or real o er , ee ary.	Seek a d re o d to ot re que to . Re or e o er or lo by rov d rea ur ev de e.
GA N NG SHARED COMM TMENT Kee tyle d, lue e te u to er relat o to a a ro rate o t e t.	H l t key o to . A k owled e te de o to ake.	U e a u be a roa t at re to a to . A k ort e a to t at let you eet bu e eed .	Detal ow e a ra te a to . S erely u ort de o . Seek a r o t e t wt out u .	O ero to a d lar y rorte ak a rodu tor erv e de o . Su ort de a d or lo al a to .
SER CE FOLLOW-THROUGH Stre te your w -w relat o by at y ex e tato a d o er .	He te d to ex e t e e ya da reed- u o del very. Prov de re der o your rove tra k re ord. Stre te your o to by a ev de red re ult .	He ay ex e t your ollow-u to are er o ale ort or o l ato . Meet eed to "look ood." Be re o ve, or al, a d o e your deal .	He te d to ex e t er o al atte to , ava lability, a d a ta e. Prov de re eat, red table ollow-u to a ure te tab lity e de re .	He ay ex e t e a ura e or relab lity a d qual ty ta dard . Su arze your bu e relat o verbally a d wrt , a d rew er od ally.

Make it a to Pla

PLANNING: Give Joe's DSC® style of behavior, what are you sure you do and avoid do ?

NOTING: How would you rate or Joe ?

INTERACTING: What questions will you ask or answer orally or a zational ue ?

RESPONDING TO CONCERNS: What are the likely order (.e., obey, ear) they have, and how a you reduce it ?

GAINING SHARED COMMITMENT: What is the most likely to be effective or a Joe's ?

SERVICES FOLLOW-THROUGH: What follow-through expectations Joe likely to have, and how a you effectively reduce it?

What did you learn from your meeting? How did you improve your next conversation with Jo?

PLANNING: What is the DSC® title of the person you called out the Customer Profile? What have you included in the title of the person?

NOTING: How was the rapport level between you? What would you do next that would react to the rapport level of the person?

INTERACTING: What customer needs were discovered? What questions did you ask during your next meeting?

RESPONDING TO CONCERNS: What were the customer's concerns? What responses would you make next that address the concerns?

GAINING SHARED COMMENT: Did you ask the person to let you know what they were thinking? What strategies will you use to help them build on their next step?

SERVICES FOLLOW-THROUGH: How does the person need to be served your follow-up business? What are the relevant business objectives to expand your business with?
